

The
Whitsundays

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Destination Marketing | Industry Development | Visitor Services

Event Fundamentals Toolkit 2021



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Disclaimer

This edition was compiled in 2020 in the interests of assisting and developing events in the Whitsundays, Queensland. The author and organisation have endeavoured to ensure that the information contained within this document is correct at the time of publication. However, the author and Tourism Whitsundays, their employees or agents, accept no responsibility or liability in respect of the said information.

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Introduction

Tourism Whitsundays, together with Tourism and Events Queensland, seeks to further develop regional events and facilitate the introduction of new events in an effort to drive greater visitation to the Whitsundays region and, ultimately, generate increased economic activity and development that benefits the community.

The key to a successful event is planning and preparation. From developing an event concept and securing funding, to executing a winning event marketing campaign – this Event Fundamentals Toolkit covers it all.



Initial Considerations and Event Concept Planning

Whether your event is new or existing, developing your event concept is important and the following tools have been developed in order for the event concept to be extracted from just being that, a concept.

The below is a 'quick' list of some general event elements that must be considered:

- Stakeholders in the event identified
- Date/s of event determined
- Key Timings determined
- Location/venue for event booked
- Venue Plan/ Site Map completed
- Event Contact List developed
- Food and Beverage/ Vendors List created
- Licenses approved
- Target audience determined
- Message determined
- Objectives set
- Event listed through Australian Tourism Data Warehouse
- Merchandise ordered
- Audio, Visual and Technical Requirements determined
- Security Plan developed
- Waste Management Plan developed
- Risk assessment completed
- Emergency Management Plan/ Risk Management Plan developed
- Ticketing/Registration Plan developed
- Alcohol Management Plan developed
- Parking Plan and Traffic Management Plan overviews developed
- Media Plan developed
- Evaluation criteria established

Example Event Concept Planning Template

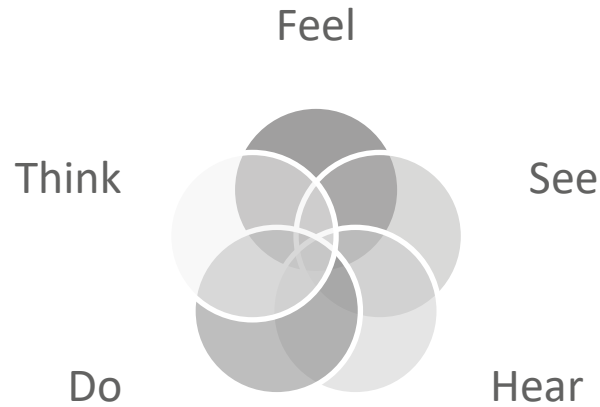
Use this example template to outline the 'concept' of your event and add in as much detail as possible.

Name of Event	Whitsunday Fun Day
Date of Event	14 - 15 August 2018
Time of Event	Saturday: 9:00am - 10:00pm Sunday: 9:00am - 1:00pm
Location of Event	Various events across Bowen, Airlie Beach, Proserpine, Collinsville
Organising Organisation	Whitsunday Fun Day Committee
Event Coordinator/Contact Person: <i>Include best contact details</i>	Mary-sue Smith Marysue.smith@whitsundayfunday.com.au
Event Description: <i>Give a brief overview of the event</i>	The event will celebrate all things fun in the Whitsunday region with a number of activities, games, and festivities that will showcase our regions many fun and exciting products and natural assets.
Target Audience (Who): <i>Who is this event targeted at?</i>	Families
Message (What): <i>What does the audience need to know? What do you want the audience to know? What will hold their interest?</i>	Name of event, dates, location, individual event timings, raising funds for a charity, sponsors/supporters, contact details. Dedication to supporting local charities, clubs, etc.
Objectives (why): <i>What are you trying to achieve by holding this event?</i>	<ul style="list-style-type: none"> • Hold an event that the whole family can get involved in; • Promote the Whitsundays region as a family friendly area with activities for the whole family; • Provide a fundraising opportunity for local clubs and organisations.
Finance (How): <i>How do you plan on financing the event? Do you know how much the event will cost?</i>	<ul style="list-style-type: none"> • The event will generate income through ticket sales, sponsorship, potential grant funding, merchandising, site fees (for on-site stall holders). • The budget has been created with a predicted profit.

<p><i>Have you created a budget for this event? Will you be trying for grant funding and/or sponsorship?</i></p>	<ul style="list-style-type: none"> • A value of \$100,000 worth of sponsorship will be required • Grant funding for strategic planning and marketing will be applied for to the value of \$30,000
<p>Risk Assessment: <i>Identify the potential risks involved in the event and develop strategies to minimize risks. E.g. Collapse of staging area</i></p>	<p>* Please see Risk Assessment/ Risk Management Plan</p> <p><i>Or list the risks involved with this event – e.g. Lack of sponsorship dollars will affect the success of the event, power failure, injured participants, etc.</i></p>
<p>Evaluation criteria established: <i>Did we achieve what we set out to do? Did it come in on budget? What were the intended/unintended outcomes? How do we measure effectiveness? What tools do we use to measure our success?</i></p>	<ul style="list-style-type: none"> • De-briefing sessions will be organised with relevant stakeholders. • A survey will be distributed to as many participants as possible with an incentive to increase response level. • Budgets will be reviewed to see if the event met the financial targets. • A review of the planning processes will be completed to assess the areas of success and those requiring improvement.

Event Connection Model

The Event Connection Model identifies how event stakeholders will perceive the event in regards to how they will feel, think, hear, see, and what they will do at the event. This model can be used in your event planning, for event participants, competitors, stakeholders, committee members, volunteers and more. Some examples have been given below:



Stakeholder	Feel	See	Hear	Think	Do
Participants	Happy	Favourite music artists	Live Music	I need to come to this event next year!	Dance
Sponsors	Excited	Sponsorship signage	Their company being acknowledged	The event was worth the sponsorship!	Sign up for following year Meet new clients/partners
Volunteers	Knowledgeable Confident Supported	People having fun	Questions from the participants	I know how to answer this question!	Help participants

Establishing the Organising Committee

The event organising committee should be formed early so it can be part of the planning, from start to finish.

Before forming a committee you should consider the purpose of the committee and the responsibilities of each committee member, how often you would like to meet, where you will meet, and if there is any catering required for each meeting. Once you have a better understanding of the committee that you'd like to create, you are then ready to invite people to join the committee.

You should invite people who share an interest in your event or have experience in planning similar events. You could ask in person or via email, place an ad in the paper, or use various social media channels to reach out to the community. Community noticeboards (electronic and traditional) are also a great tool for promoting these opportunities.

Once you have your organising committee together, you will need to determine the structure of the committee (formal/informal) and the role each person is to play – i.e. Chairman, Deputy Chairman, Secretary, Treasurer, etc. Aside from the official committee roles, you will need to establish support roles for each important element of the event, e.g. Sponsorship Officer, Entertainment Officer, Public Relations Officer, Risk Management Officer, etc. For larger events, you may wish to allocate funding for these support roles and appoint professionals to assist your committee in executing these tasks with ease.

Finally, it is essential to document the discussion and outcomes of each committee meeting, and provide the minutes of each meeting to all members – this will ensure your event planning is managed appropriately and nothing is accidentally overlooked.

Budgeting and Financial Management

The Event Budget will fundamentally be one of the most important parts of your planning process. The event budget is a projection of the expected income and expenditure elements your event will incur based upon the plans made and the information gathered such as quotes or costing from previous years.

All event costs should be documented, especially within the first year of an event and it is important that all predictions are made with reasonable accuracy or over estimating, and equally, all income should be reasonably estimated (don't estimate the generated ticket sales of 5,000 people attending your event within the first year if you are only really going to be getting 1,000). As a result, you will be able to predict whether the event is set to result in a profit, loss or break-even and forecast the financial outcome of the event.

The Event Budget is one of the earliest tasks that must be undertaken whether you are designing your event concept, or you are in your tenth year

of the event. It is important to note that if within the event concept planning stage, you may be required to spend time getting quotes, estimates or find costs to get an idea on how much your event will cost. It is then crucial, whether you are in early event concept planning stages or, as mentioned above, an annual event, that your budget is kept up to date by amending the figures as the event planning continues. This will ensure that for the next year, you will have a more accurate idea of how much the event will cost and how much income you may receive. It is not possible to accurately predict *exactly* how much income and expenditure will occur, so it is vital to keep the following rules in mind:

- Budget to avoid making a loss
- Be realistic about event incomes
- Have a contingency plan i.e. what happens if the sponsorship is not forthcoming?

Typical Event Income

- Ticket, registration or gate sales
- Sponsorship (cash and in-kind)
- Grant funding
- Merchandise including profit made from event programs
- Site fees (e.g. coffee vans)
- Raffles or prize draws

Typical Event Expenditure

Administration

Events usually require considerable communications with participants and the event management team including postage and telephone expenses. Stationery, printing and photocopying are also ongoing expenses.

Finance

Financials may include auditing, consultants, budgeting, registration/booking fees incurred by event registration systems, merchant fees, etc.

Insurance

Additional insurance can be taken out to cover risks of injury and/or financial losses associated with events.

Travel and Accommodation

Costs associated with officials needed to run the event may have to be borne by the event organisers. Event participants are generally responsible for their own travel and accommodation costs. In minor or local events, travel and accommodation costs are unlikely.

Trophies, Awards and Prizes

The cost of medals, trophies and other awards requires detailed knowledge about the number of competitors, the categories of divisions of the competition and the format of the competition.

Medical Fees

Events require persons with at least First Aid training to be in attendance. Larger events may also warrant the employment of a doctor, physiotherapists, ambulance, etc.

Venue and Equipment Hire

Information about the probable cost of the venue needs to be obtained as early as possible. Some events will be lucky enough to secure an in-kind venue; however, beware of hidden costs such as cleaning, heating, and lighting costs. Equipment hire includes equipment directly used by participants in the event and any equipment used by the event team.

Marketing and Promotion

Expenditure on promotion may be considerable dependant on the financial position of the event and the prioritisation of marketing and promotion efforts. Promotion covers items such as advertising, giveaways, costs associated with promotional events and sponsors' signage.

Volunteers

Although their work time is voluntarily free of charge, if they are to incur expenses as a result of volunteering, the responsibility is of the event to cover those expenses.

Bits and Bobs

Lastly, it is always important to put a collateral fund together that includes small expenses including stationery items, extension cords, insect repellent, first aid kits, batteries, etc.

Grant Funding

Each year, millions of dollars are distributed to events to help pave the way to a more successful event. There are also a variety of government organisations, foundations, and businesses that can be a potential grant funding source. In regards to events, it is usually the community based projects that attract the interest of these ‘grant funding pools’. It has also been found that grants are particularly useful and successful during the early years of an event, or an event that is looking to reach new goals and objectives.

Grants typically range from \$5,000 to \$2,000,000, some requiring your business to provide part-funding and others not requiring additional funds. However, the process is often time consuming and most events simply cannot afford to spend valuable time and effort trawling through government websites or reading hundreds of pages of program information. But in some cases a grant may mean the difference between success and failure for many event organisers.

Hot Tips for Grant Writing

- List your event for free on the [Australian Tourism Data Warehouse \(ATDW\)](#) first. Most major event grant funding bodies require you to list your event and show evidence as support material
- Never underestimate the amount of time it takes to complete a grant funding application, always try to find out when the funding rounds open and close to make sure you have enough time to submit your application
- **Always read the Grant Funding Guidelines**, make reference to how your event meets the guidelines in your application, and then check those guidelines again after you have finished writing the application to make sure you have covered all eligibility criteria. Additionally, always check the funding restrictions and limitations

- Contact the grant funding body and ask as many questions as you can think of, this may give you more clarity about what you are applying for
- Research the organisation’s mission and areas of interest to obtain a better understand of what the organisation is about
- Never change your event or event needs to suit the eligibility criteria of the grant fund, rather find a grant that suits your event and your needs
- If outsourcing a grant fund writer, ensure the content the writer submits aligns closely with what the event is about. At the end of the day, grant fund writers know how to write grants, but they may not understand the concept, goals and objectives of your event
- Business plans, marketing plans and event plans are all strong support material; a lot of grant fund bodies request these documents be attached to your application
- Support letters are almost always a requirement. Make sure you ask for a support letter from Whitsunday Regional Council and your RTO, Tourism Whitsundays
- Find out before you submit a grant funding application what acquittal details are needed
- To view an extensive Grant Funding Writing Guide for great information on applying for grants, head to [Click Here](#).
- To view and/or find more grant funds head to [Grant Guru Community](#)
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Grant Funding Options

The following grant funding programs have been chosen due to their compatibility with the Whitsundays region specifically, however may not suit all event needs. Be sure to check when the grant fund opens at least 2 months before the closing date.

Name of Grant	Provider	Contact Details
Event Specific		
Minor Event Funding/Major Event Funding	Whitsunday Regional Council	www.whitsunday.qld.gov.au
Queensland Destination Events Program (QDEP)	Tourism and Events Queensland	www.eventsqueensland.com.au
Major Events Investment	Tourism and Events Queensland	www.eventsqueensland.com.au
Arts and Culture		
Festivals Australia	Australian Government	www.australiacouncil.gov.au/grants
Regional Arts Development Fund (RADF)	Arts Queensland	www.whitsunday.qld.gov.au/radf
Sport and Recreation		
Get in The Game	Australian Government/ Australian Sports Commission	www.nprsr.qld.gov.au/funding/getinthegame
QLD Sport and Recreation Industry Development Program	Department of National Parks, Recreation, Sport and Racing	www.nprsr.qld.gov.au/funding/getinthegame
Community Partnership Programs		
SITA Community Grant	SITA Australia	www.sitacommunitygrants.com.au/
Gambiling Community Benefit Fund	Queensland Government	www.olgr.qld.gov.au/grants/programs/community/
Breakwater Island Casino Community Benefit Fund (BICCBF)	Queensland Government	www.olgr.qld.gov.au/grants/programs/community/
Corporate Community Program Opportunity	North Queensland Bulk Ports Corporation	www.nqbp.com.au/communities/
Community Enterprise Foundation	Bendigo Bank	www.bendigobank.com.au
Volunteer Grants		
Volunteer Grant	Department of Social Services	www.dss.gov.au/grants-funding/

Sponsorship Recruitment, Management and Retention

Hot Tip 1

Identifying benefits – value adding without the cost!

Providing an exclusive opportunity for sponsors is also considered a benefit, it does not mean that they have to take you up on that benefit and is at their own cost if they do. E.g. provide an exclusive opportunity to be listed in the event program, it is not a cost, but it is something a sponsor has the opportunity to use that their competitors cannot.

Hot Tip 2

Communication is key!

There are so many ways to communicate effectively with a sponsor, but be creative and efficient; Coffee Catch-ups with sponsors gives them a credible reason to get out of the office, detailed bump in/out brief's give them information they need on the day to ensure their movements don't cause a disruption to your management of the event (and keeps them calm!), VIP Lanyards with contact information of who they need to talk to if they run in to an issue on the day on the back, not only gives them a sense of purpose and importance, but is useful!



Hot Tip 3

Always say 'Thank You'!

Sponsors often say that they feel like once the event is over, they don't hear from event organisers after the event, here is an effective timeline of excuses to talk to your sponsors after the event:

- A quick but genuine call to say 'thank you' after the event
- Send them a certificate that says 'thank you for your support'
- Send them a report after the event about the success
- 'General catch-up' to see how things are going and what their plans are for their organisation in the next year.

Hot Tip 4

Find out what they want, and how you can meet that need!

Ask questions, lots of them! Who is their target market, have they sponsored an event before, what do they enjoy about events marketing, what do they not like, what do they try or would like to achieve through sponsoring an event, what is their favourite colour? The more you know about the sponsor, the more opportunity you have to come up with creative ideas in helping them achieve their goals and objectives.

Hot Tip 5

Be prepared!

Know what your event is about, who it attracts, the history, the purpose, the goals and objectives, dates and times, where people come from –

everything. It is important to know your event back to front - you don't want to lose a potential sponsor, because they may not give second chances.

Hot Tip 6

Pick your potential sponsors carefully!

Potential sponsors deserve one-on-one time. Start with 10 key businesses that you believe would best suit your event and prior to meeting with them find out who the decision makers are and make contact with them directly if possible - be ready to sign off on an agreement at that meeting. It is unlikely but if you're prepared, it shows you're committed, ready and also the decision maker for the event.

Sponsorship Overview

If you have ever organised an event, you probably know what an important role sponsors play in the success of the event. Sponsors can help with generating the income required to hold the event, getting the word out, and sometimes with the production of the event (e.g. in-kind donation of infrastructure). To secure the right sponsor takes a mix of an irresistible sponsorship offering mixed with *creative thinking* and *relationship building*.

Examples of Sponsorship Benefits

Target Audience	<ul style="list-style-type: none"> • Access to event database (if your database allows it) • Ability for sponsor to advertise through event e-newsletter • Provide event report surveying attendees on sponsor based questionnaires
Brand Loyalty	<ul style="list-style-type: none"> • Provide product to event attendees (rewarding their use of your product/ attending the event)

Event sponsorship makes perfect business sense for your event and also the potential sponsor, however there are some very important key points to remember.

- The sponsor will never think of your event's needs before their own;
- A sponsor considers sponsorship a marketing opportunity;
- The event will satisfy their need to 'contribute to the community as part of their corporate responsibility policy', but that is considered a *bonus* as part of the sponsorship;
- Sponsorship should be treated as a business deal and all promises must be kept.

From the above key points, it is easy to identify that sponsorship really is *all about the sponsor* so why do organisations sponsor?

- Enhances the reputation and image of the sponsoring company through association.
- Gives product brands high visibility among key audiences.
- Provides a focal point for marketing efforts and sales campaigns.
- Generates publicity and media coverage.

Develop/Enhance Relationships (with event attendees or other sponsors)	<ul style="list-style-type: none"> • Allow a stall at the event where businesses can talk one on one with attendees • Staff of business at entry of event/part of entry process for one on one time • Allow networking opportunities for sponsors i.e. a sponsor night • Allow discounts/ deals that can only be distributed between sponsors
Brand Image	<ul style="list-style-type: none"> • Naming Rights sponsor's logo be attached to event logo • Sponsor logo on all event advertising to encourage brand association
Display/Sample Product or Service	<ul style="list-style-type: none"> • Sponsor's free product in registration bags • Allow sampling stall of sponsor at event
Corporate Image	<ul style="list-style-type: none"> • Media/PR opportunities to acknowledge partnership
Brand Differentiation	<ul style="list-style-type: none"> • Exclusivity rights so competition cannot also sponsor event • Offer an exclusive media opportunity or branding opportunity that no other brand could copy unless they were a sponsor (i.e. branded inflatable arch at event/ signage on a boat)
Stimulate Sales, Trial or Traffic	<ul style="list-style-type: none"> • List logo and link to sponsor's website on event website • Allow event attendees the option of purchasing a particular item of the sponsors when registering for the event (i.e. magazine subscription)
Corporate Social Responsibility (CSR) and Foundation Objectives	<ul style="list-style-type: none"> • Media release of sponsor signing up
Experience the Brand	<ul style="list-style-type: none"> • Allow opportunities to give away sponsor's merchandise
Counter the Competition	<ul style="list-style-type: none"> • Exclusivity rights so competition cannot also sponsor event
Brand Awareness (Top of Mind/Accelerate Acceptance)	<ul style="list-style-type: none"> • Sponsor logo on all advertising • Sponsor logo inclusion in 3-6 month advertising campaign
Brand/Product Credibility	<ul style="list-style-type: none"> • Alliance between credible event and sponsor
Attract and Retain, Motivate and Reward	<ul style="list-style-type: none"> • Free entry/registration to event • VIP access for sponsor's employees

Employees	<ul style="list-style-type: none"> • Free event merchandise for participating employees
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Evaluation

Sponsors know how important it is to make sure you are constantly working at improvement, they do it every day, it's why they are sponsoring you, and so it is important to evaluate the success of your sponsorship plan.

Pre-recruitment

Human Resources

It is extremely important to scout the right person or people to handle the event's sponsorship and there are numerous ways to have your sponsorship handled.

Events can either be run by a professional event management company, or be run by a committee and dependant on the financial standing of the event. The event organisers can either choose to outsource, or use one of their own committee members to take on the sponsorship management role.

Sponsorship Manager Position

It is important that no matter who takes on the responsibility of the sponsorship manager they must have some key qualities and skills that will ensure they have the ability to secure sponsors, manage the relationships and evaluate the process.

Succession Planning: Sponsorship History

Event organisers and committee members often have a high turnover, whether it is a couple of months, or a couple of years, there is always new

people involved in the event. Sponsorship history is therefore important to document for a number of reasons, including:

- *I haven't heard from the event organisers for 6 months!*
If a sponsor is loyal, they will have a certain standard that they expect, whether it is a regular 'social coffee', a certain level of professionalism or special treatment (specific benefit that nobody else gets), it is important to have all these details on hand.

- *Those who fail to learn history are doomed to repeat it!*
If a sponsor has been mistreated in the past or forgotten about when it came to a specific benefit that they were meant to receive, it can often lead to them not returning as a sponsor the following year. If you are able to fix the relationship, then that is fantastic news, but don't expect that if it happens again, you would be able to fix it again even if you have a new person as the sponsorship manager. It is important to know the mistakes so that you can pay special attention in not repeating them!

- *I've been approached numerous times, but I can't commit!*
Often there will be sponsors that are constantly having requests for sponsorship, save your time by knowing who has said no in the past and why. There is a fine balance between being proactive and going back to sponsors who have rejected sponsorship proposals in the past to try and get them on board in a new year, and hassling sponsors who said they won't be able to sponsor for the next three years.

- *We never do cash, only in-kind!*
Some sponsors are on board for a certain reason and will give only certain benefits to the event. It is important to know what your sponsors give. You may have spent the last two months organising traffic control and trying to

re-balance the budget due to the cost, not knowing that the last sponsorship manager of the event organised a very good deal with a traffic control provider that sponsors the event by providing traffic control in-kind.

Specific Partnerships (Your VIPs)

There will be certain partnerships and relationships that are confirmed every year due to the nature of the event. These partnerships and relationships should be maintained even if there is no real ‘sponsorship’. Event organisers typically maintain partnerships with their local council, regional tourism organisation, grant funding bodies (e.g. Tourism and Events Queensland), and established local industries.

These partnerships often have strong connections and may have insights and information that your event could benefit from. They also form part of your ‘VIP group’ which you should keep in mind for any event launches, particular media opportunities, or special treatment opportunities at your event.

The ongoing management of these relationships will provide greater opportunity to give credibility to your event, acquire support letters for any potential grant funding applications, and/or attract other personalities, sponsors, or partners to your event.

Your VIP Quick List

This quick list aims to give you direction about who you should invite to your event, each of the organisations are linked to the website so you are able to access the contact details. It is important to make contact with the organisation to ensure you have the right contact information and are following all processes in inviting VIP as some have online invitation systems.

Hot Tip: Just because you may invite all of these VIPs does not necessarily mean they will all attend.

Organisation	Position
<u>Queensland Government</u>	Premier of Queensland
<u>Tourism Australia</u>	Senior staff representatives
<u>Tourism and Events Queensland</u>	Chief Executive Officer, other senior staff representatives (particularly those aligned with the Whitsundays/Mackay region)
<u>Whitsunday Regional Council</u>	Mayor
	All Councillors
	Chief Executive Officer
<u>Tourism Whitsundays.</u>	Chairman
	Chief Executive Officer
	Tourism team
<u>Chamber of Commerce (Airlie Beach)</u>	Chairman

<u>Chamber of Commerce (Proserpine)</u>	Chairman
<u>Chamber of Commerce (Bowen)</u>	Chairman
<u>Tourism Bowen</u>	Chairman, Tourism Manager

Event Sponsorship Needs

What does your event require to be successful? Event organisers need to go through their event plan and the budget and identify what they need (resource wise) and how much money they need (cash wise) to be successful. The needs identified will form what goals and objectives must be achieved. E.g. the event requires a minimum of \$150,000 in sponsorship value, or \$100,000 in cash and \$50,000 in in-kind partnerships.

Your identified needs will also be used to help formulate how your sponsorship packages will be packaged in regards to value and cost.

Sponsorship Goals and Objectives

Before identifying what the event can give to sponsors, it is important to identify what the event needs first.

Goals and objectives should be a vital part of the sponsorship plan and be used to ‘benchmark’ progress of the sponsorship. The goals and objectives will differ, with goals identifying ‘general’ ambitions, while objectives should identify the cold hard facts based on the SMART principle (Specific, Measurable, Achievable, Realistic and Timely).

Goals example:

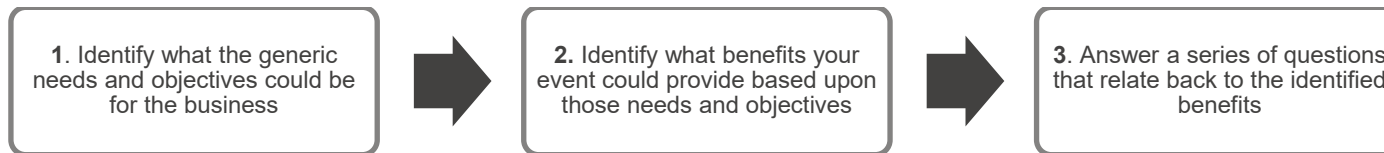
- Recruit sponsors nine months prior to event to ensure effective sponsorship lead time
- Replace cost of fencing with an in-kind sponsor

Objectives example:

- Confirmed five new sponsors (signed agreements) valued at \$5,000, six months prior to the commencement of the event
- Develop a 90% sponsorship satisfaction rate in regards to how the sponsorship process was handled for current sponsors

Sponsorship Message and Opportunities

The sponsorship message will be unique to every event. Although the basic principle is, “We need something, you have that something”. This type of message won’t get you sponsorship. There is a three stage process in which this message can be created and opportunities identified, which can then easily be tailored for whatever business you choose to approach:



Companies typically consider the following when reviewing a sponsorship proposal:

Will this partnership target our audience?	Will this partnership enhance brand awareness/credibility?	Will this partnership provide an avenue to promote our product/services?
Will this partnership fit with our brand/develop brand loyalty?	Will this partnership assist us in meeting our Corporate Social Responsibility (CSR) objectives?	Will this partnership assist us in differentiating our brand from others and counter the competition?
Will this partnership enhance our corporate image?	Will this partnership assist us in attracting, retaining, motivating and rewarding employees?	Will this partnership stimulate sales/increase traffic?

Before even thinking of approaching any businesses regarding sponsorship and the opportunities, you must take off your "selling" shoes and put on your "buying" shoes and see yourself as the business owner about to be approached for sponsorship. To truly create an irresistible sponsorship offer, it's critical that you see the opportunities from their point of view. Once in your new "shoes" ask yourself per opportunity:

What's in it for me (W.I.I.F.M)?

- What is unique about this opportunity over others?
- How is my company directly engaging the audience at this event?
- What kind of return could I see from sponsorship? (doesn't necessarily mean monetary)
- Do I like this event and does the audience fit my target audience of my business?

Answering these specific questions will also differ for each sponsor, so change your shoes around when thinking about the different types of sponsors and what their business comprises. A clothing store might want to use the sponsorship opportunity to market their clothing brand or sell clothes at your event, whereas a mining company might be interested in the public relations campaign to promote that they are supporting a community event, or the VIP experience to reward their staff. Once you have a range of answers, you have the ability to go to the potential

sponsors and not only tailor your message but say that you can tailor your proposal to satisfy their needs.

Identifying Value

A very common question is - how do I measure what my sponsorship package is worth?

A sponsorship package is a bundle of opportunities that has a perceived value attached to those benefits. Here are some considerations of ways to calculate your sponsorship package value based on what you can and cannot calculate:

- As you are in a regional location, what is the approximate cost a local/small business could afford in sponsoring your event?
- What is your target for sponsorship and how can you break that down in to achievable amounts?
- What are other events offering as part of their sponsorship and for what price?
- What costs do you have to cover in order to attract sponsorship (your sponsorship must cover costs and give you profit).

- What is the total value of the tangible benefits (i.e. if you are offering a free ticket to the value of \$100)?

Potential Sponsors

It is important to identify potential sponsors that have a likelihood of being interested in your event and an important part of this process is identifying who is involved in your event. When preparing a list of potential sponsors, consider the following:

- How big the organisation is (e.g. are they a small local business, a national, or international business)?
- How much revenue does the organisation make each year?
- What other events does the potential business sponsor?
- What is the business' Corporate Social Responsibility strategy?
- Does the business have a sponsorship process?
- When does the business operate (is it seasonal, i.e. builders/tourism operators)?
- Who do they want to build a relationship with?
- What are they interested in using sponsorship for?

Research Mediums

- Corporate website (specifically look for community related content)
- Previous media releases/ media portfolio
- Meet with the sponsor and ask the questions

Sponsorship Agreement

Before proceeding with a sponsorship arrangement, it is essential that an approved contract is created and agreed upon between the event and the sponsorship partner. The agreement should cover off on the benefits that both the sponsor and the event will provide.

Hot tip: Ideally it would be a good idea to attract a law firm representative as a committee member to assist you in the development of the agreements with sponsors, or if you have an opportunity to source a law firm as a sponsor, they may provide you with the service as part of their in-kind value.

Management of Sponsors

Once sponsors have been recruited, the management of the sponsors is crucial as it is part of the entire process that may make or break future sponsorship attraction and retention.

Developing a number of tools to help manage your sponsors is a great way to document your process correctly and implement into your strategic planning.

Sponsorship Database

A sponsorship database is a key management tool for sponsorship management. There a number of key benefits for event organisers in keeping the database up to date and also using it to reflect on. Key information that would be included in the sponsorship database includes:

- Contact list – Business/organisation name, first name, last name, position of contact, contact information such as email and phone number, physical address of business location, as well as the reason for contact and any additional details
- Sponsorship budget – how much monetary value they have contributed, how much in-kind, total balance or estimated vs. actual vs. in-kind
- Promised deliverables for each sponsor outlined
- Potential sponsorship benefits that you can offer to sponsors to have on file

How to Make Sponsors LOVE YOU

by *Merry and Storey (2013), Exhibiting and Sponsorship Institute.*

Being a sponsor is tough. They invest significant money on the event. They have to spend more money getting their team, their marketing material, their giveaways and their technology onsite. They then have to get to the event early, stay late, always be nice to people, try to attract business and then head back to the office after the event with a load of work to catch up on as well as following up their new leads.

- **Use their name and make it personal**

While it may be the company that is sponsoring your event, make sure you know the key people behind the sponsorship. When you are talking about your sponsor (the business), be sure to mention the people too – and be sure to get their names right!

- **Make them sound fantastic**

Typically the MC will acknowledge the sponsors, ask for a round of applause and let everyone know how important they are. Then they seem to be forgotten. Brief the MC with some detail on each of the sponsors. It is the difference between a TV advert that screams “buy my stuff, buy my stuff” and a storyline that engages the audience and calls them to action.

- **Check their satisfaction frequently**

You have a thousand and one things to do. Make sure that one of the high priority things is to catch up with your sponsors frequently. Frankly, this is where a huge chunk of your funding comes from so you need to pay attention to them. Listen to any issues they may be having and get one of your team to address them. Discover any great results that they may have achieved and put it in your file to use for next year’s marketing. You can also let them know what is

happening soon or what other things are going on in different areas to make them feel more a part of the event.

- **Help them with bump in and bump out**

While you don’t have to physically help your sponsors carry their equipment in, they would truly appreciate it if you had a few people on hand to assist them. At the very least, a check list of items that they may need or things that they have to consider would go a long way. If you do provide a check list make sure that it is easy to read with tick boxes so they can tick it as they go. This is all about making it easier for your sponsor.

- **Have a single point of contact**

We love the idea of having a dedicated sponsor manager for your sponsors. We would encourage each event to have someone trained in managing sponsors. Not just in how to sell to them but how to look after them. It is a different skill set to organising and running an event and in all honesty, some people should not have anything to do with sponsors as they are ill prepared to deal with them. The single contact person means that there is clarity in communication and less chance of missed or mixed messages.

- **Send them customers**

Nothing says “I love you” to a sponsor like sending customers their way. As an event organiser you will often come across people who may need your sponsor’s products or services. Why not refer them to your sponsor? On-site you can walk them up to the stand and introduce the client. Outside your event a simple phone call or email is great.

- **Make them feel special**

Nobody wants to be “just another one of the sponsors” so make sure you talk each sponsor up when you are chatting with them. Be

genuinely enthusiastic about what they are doing, the impact they are having on your event and their presence.

- **Say thank you**

Too often the sponsors get forgotten. Many sponsors we have dealt with feel that people only pay attention to them when there is money to be collected. It wouldn't take much to send a post conference thank you card, maybe a thank you basket or perhaps something uniquely matched to their taste.

Showing the love to a sponsor will pay back dividends time and time again. It will help them become lifelong event partners rather than a short-term grab for cash.

Sponsorship Evaluation

Surveying sponsorship satisfaction is important in identifying not only where the event's strong points are within the sponsorship process but also where the event has an opportunity to further improve. Event organisers may be surprised where their process needs further improvement or innovation to increase the sponsorship experience. The survey and evaluation process should remain similar each year to develop comparable data, so you are able to see how your event is evolving each year.

Sponsorship Survey

Two types of surveys should be utilised when evaluating sponsorship; one should be distributed to the event participants questioning their perception and awareness of the event's sponsors, and the other survey should be distributed to sponsors to gauge their satisfaction of their experience as sponsor of the event.

The sponsorship survey for the participants should assess if they recognised sponsorship branding attached to the event and what that means for the participant. Questions should be based upon the sponsorship outcomes that were promised to the various sponsors.

E.g. For a sponsor that was looking to increase sales through sponsorship of the event, you would ask the event participant the following question:

“If applicable, would you be more inclined to buy off the sponsor because they have sponsored this event?”

The answers to the questions provide greater support material when trying to keep current sponsors on board for the future years and also when attracting new sponsors.

The sponsorship survey that would be distributed to the sponsors would be focused on assessing their satisfaction levels of the sponsorship management process. Questions should be based around assessing all parts of the process from attraction to retention and whether the promised benefits were delivered as below.

E.g. “Were you satisfied with the media coverage of the event's Launch Party?”

Sponsorship Reporting

Once you have distributed the survey, and collected and evaluated the results, it is important to develop a report that you can provide back to sponsors. There are a number of key benefits that the sponsorship report can do for your event:

- Provides support material when trying to attract new sponsors
- Provides support material when trying to retain current sponsors
- Provide a presentable insight for committee members
- Provides a document that future sponsorship managers can use

The report should include information that will provide insight on how successful the sponsorship was for the business:

- Who attended your event (e.g. were they female/male, what age, etc.)
- Event success (e.g. did you attract as many as you anticipated?)
- Sponsorship satisfaction rates
-
- Event images of event attendees and people around any sponsorship signage
- Overview of marketing collateral and estimated value of all marketing
- Expression of interest to sign on/re-sign for the following year's event

Volunteer Recruitment, Management and Retention

The importance of volunteers in the event industry is well known. Their contribution in both economic and social terms is extensive and much of the activity of the industry would not happen without their support.

Volunteer Organisation Goals

Strategic plans must have a clear focus; the purpose of a volunteer management plan would aim to achieve all or some of the following goals and objectives dependant on what the even organisation wanted to achieve:

- To recruit required amount of volunteers
- To give the volunteers a positive experience
- To retain volunteers
- To have a successful event which runs 'smoothly'
- To provide a platform in improving volunteer management for future events
- To respect and value the volunteers experience and opinion of the event

What Defines a Volunteer?

“Volunteers are representatives from the community who freely choose to give their time and skills to support event activities for no payment other than reimbursement for out of pocket expenses”

Ausport. (2004). *Club Management Program*.



Volunteer Background Research

In order to successfully recruit and retain volunteers, it is imperative that thorough research is conducted. Research will help organisers in learning how to recruit volunteers, where to look for volunteers, what demographic would most likely be willing to volunteer for a particular event and why they are willing to volunteer. It is also important to look at the cost of volunteers and reimbursement in order to appropriately justify the need for volunteers.

Costs and Reimbursement

Although volunteers are important because of the lack of cost involved in obtaining their services, it is important to understand potential costs and their out-of-pocket expenses so they can be avoided if possible.

Volunteer Resources

There are a number of great resources available to event organisers.

Position Descriptions

The outline of the volunteer positions that are required for the event is crucial. It allows for an understanding of where volunteers are needed throughout the event and what the key job descriptions are for each volunteer. It is important to have a basic understanding of the volunteer positions before recruiting the volunteers. A good idea is to ask volunteers to fill out a form describing what they did while the event was on.

Volunteer Organisational Structure/Hierarchy

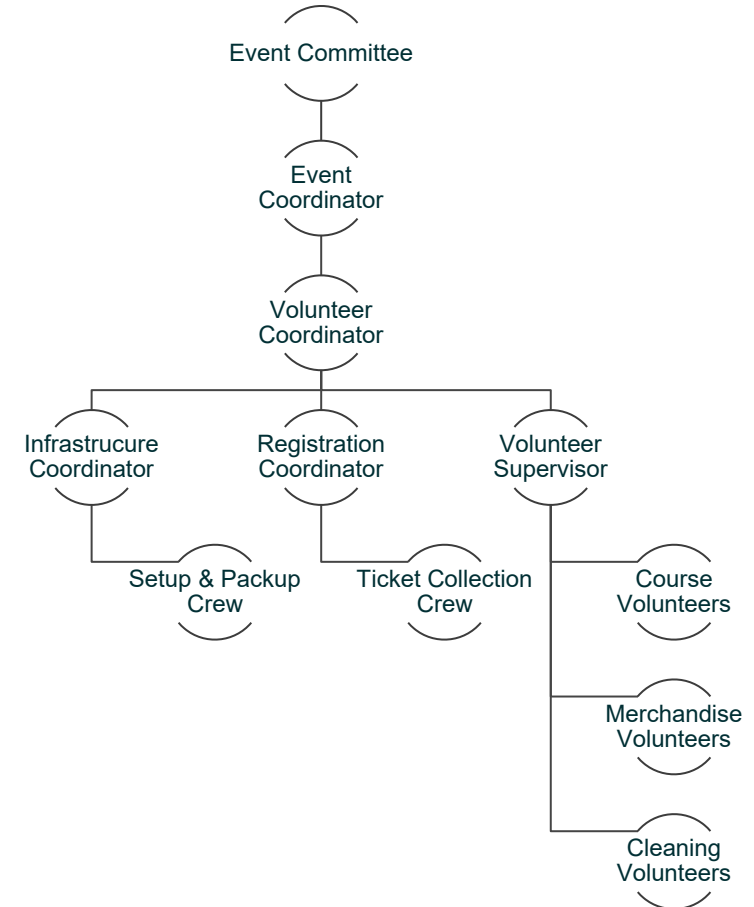
Events have the ability to have very minimal amounts of volunteers, or often can have hundreds to thousands. In either circumstance, event organisers may opt to create a Volunteer Organisational Structure (VOS).

A VOS provides a framework for not only event organisers and volunteer coordinators, but also the volunteers themselves. The VOS allows all levels of the structure to clearly identify who they report to, who has the final responsibility of what task and also the ability to show what roles are delegated by whom.

Woodford Folk Festival is a clear example of why it is so important to have a volunteer organisational structure, especially when organisations have many people involved.

Volunteer Position Map

If your event has a site map, it is possible to draw the locations where volunteers may be required – this will then create the Volunteer Position Map. This tool gives volunteers a clear direction as to where they are required within your site, venue or course.



Volunteer Coordinator Position Description

The volunteer coordinator's position is important to the overall success of the event. It is important to annually evaluate the role to make sure that the coordinator knows what their role within the committee is, and what

Position

The volunteer coordinator holds a position on the general committee acting as a link between the management committee and the volunteers themselves. The volunteer coordinator supervises and manages the volunteers, and manages the volunteer program and policies of the organisation.

Job Description and Responsibilities

- Assist in the development of the Volunteer Management Plan
- Promote volunteering through community meetings and the media
- Develop a budget for the volunteers in consultation with the treasurer
- Ensure that volunteers are reimbursed for their approved out-of-pocket expenses
- Assess the human resource needs for the event
- Source volunteers from the community and help to create educational opportunities
- Recruit and recommend the appointment of volunteers to roles that suit their skills and knowledge

their responsibilities are. This will enable them to effectively delegate to the volunteers. The volunteer coordinator position description will change from event to event, however the following is a generic outline of duties carried by a volunteer coordinator.

- Organise the orientation and the induction of volunteers
- Identify and organise the training and education opportunities for volunteers
- Ensure all volunteers have appropriate qualifications, licenses and/or certifications, including Blue Cards when children are involved in the event
- Work with the Secretary organising volunteer rosters and maintaining records
- Ensure all volunteers are recognised for their efforts
- Submit regular reports to the club/group committee
- Assist in the ordering of Volunteer gear – e.g. shirts, hats, name badges, etc.

Skills Required

- Can communicate effectively
- Demonstrates leadership skills
- Good interpersonal skills
- Is positive and enthusiastic
- Is well organised

Individual Volunteer Position Description

The outline of the volunteer positions that are required for the event is crucial. It allows for an understanding of where volunteers are needed throughout the event and what the key job descriptions are for each. It is important to have a basic understanding of the volunteer positions before recruiting the volunteers. This information can then be distributed to

volunteers during briefing.

Below is a template of how you can simply state the positions of each type of volunteer, relevant duties and, for organisational purposes, also state how many are required.

Position	Description	Recommended No. of Volunteers Required
Set-up Crew	<p>Volunteers are required for initial set up of the event. This includes:</p> <ul style="list-style-type: none"> • Setting up of water stations, tents, tables and course • Putting sponsorship signs up • Registration/volunteer/cloak room equipment 	15

Volunteer Dates/Times

Volunteer dates and times will vary every year depending on the needs and schedule of the Event Coordinator and Committee. It is important to identify when volunteers are required and then break those times down into groups

of hours, so that volunteers aren't required to work tiring hours. An example of how the volunteer dates and times could be set out is shown below.

Thursday, 09 March 2019	<input type="checkbox"/> 8am-12pm	<input type="checkbox"/> 11.30am-4pm
Friday, 10 March 2019	<input type="checkbox"/> 8am-12pm	<input type="checkbox"/> 11.30am-4pm
Saturday, 11 March 2019	<input type="checkbox"/> 5am-9am <input type="checkbox"/> 8.30am-1pm <input type="checkbox"/> 12.30pm-3pm	<input type="checkbox"/> 2.30pm-6pm <input type="checkbox"/> 5.30pm-8pm <input type="checkbox"/> 7pm-10pm

Key Principles for Effective Volunteer Management

There are four important stages relating to developing and implementing a successful volunteer management program:

- Stage 1- Pre-recruitment
- Stage 2- Recruitment
- Stage 3- Retention
- Stage 4- Review

The information provided in the four stages outlines the necessary structures, resources, process and information and should be used to ensure success of the volunteer management plan. Each stage is broken down with information that will provide a better understanding of the importance each stage plays.

Pre-Recruitment

Pre-recruitment involves the process of deciding how you will attract volunteers, how many are needed and for what they are needed. This stage involves the creation of documents such as a volunteer database, flyers to advertise for volunteers, an application form, a recruitment information flyer email, and feedback surveys. If these documents are created in this stage, organisers will have a much more organised and successful event.

The pre-recruitment strategy involves not only creating certain documents that will inevitably create awareness that there are volunteer opportunities available, but also help to control those volunteers that are recruited.

Volunteer Database

The creation of a database for volunteers is very important. It is the starting point in recruiting volunteers. The database has all previous volunteers' information in it and is a great tool to source volunteers for the current year.

Volunteer Application Form

The application form is extremely important. It is the backbone in keeping in contact with the new volunteer. Distributing the Volunteer Application Form is completely up to the event's budget and ability to distribute.

Volunteer Flyer

The volunteer flyer needs to stand out to capture the targeted audience. It is essential to have **COLOUR** and **BOLD** writing to ensure the important information is noticeable. Basic information that needs to be included:

- Event dates
- Event logos
- Brief overview of the event
- Brief overview of what the flyer is trying to attract
- The list of positions volunteers are required to fill - optional
- What they receive (e.g. volunteer bag) - optional
- Contact information on who they contact if interested in volunteering - A MUST

Recruitment

The volunteer recruitment process is important to a particular event as the event coordinator is identifying and 'hiring' a job vacancy in a most cost effective manner; however it is for unpaid service.

Recruitment Strategy

This part of the pre-recruitment stage looks at where to recruit volunteers from. Event organisers need to look at what the event has traditionally done and what has worked in the past. Here are a couple of ideas to find your volunteers:

- Banks such as NAB have an Employee Volunteer Program where they provide two days paid volunteer leave each year for its employees.
- Committee member's place of work may have staff that enjoy volunteering their time;
- One-on-one approach: Ask your family, friends, and then ask them to pass along the message!;
- Teachers and parents will often volunteer their time if children are involved in the event;
- Print flyers and post them on local notice boards, cafes, gyms, shopping centres, food outlets – just make sure you have permission;
- If you've got a budget, local newspapers, radio and television stations can get the message out there;
- Send emails to local organisations, business, clubs and or education facilities;
- Social networking through the event website, Facebook, Twitter, LinkedIn.

Volunteer Groups/Stakeholders

There are a number of volunteer groups and stakeholders involved in events - through the provision of resources in the recruitment, retention and review processes.

Volunteering Queensland

Volunteering Queensland is Queensland's peak body for volunteering. It is also the state's member of Volunteering Australia. It provides a state-wide volunteer referral service as well as education and training programs for volunteers and volunteer managers.

The centre provides a wide range of support information including:

- Code of practice and Standards for Volunteer Organisations;

- Volunteer Rights and Responsibilities (for volunteers and organisations);
- Volunteer Recognition Events, e.g. National Volunteer Week, International Volunteers Day;
- Volunteer Resources;
- Volunteer Insurance; and
- Volunteer Targeted Programs.

Website: www.volunteeringqld.org.au

Volunteer and Task Needs Matched

With volunteers having a major impact on the success of an event, it is important to make them feel confident and happy with the job they are doing and that they feel they are contributing to the event. The direct impact of placing an inappropriately skilled or unmotivated volunteer in the wrong role can have negative consequences for the event and its overall success. To ensure this doesn't happen, a good knowledge and understanding of the position preferences in the volunteer database and matching those particular people to their required role will have a positive outcome for both the event and the volunteer.

Applications to Database

It is important that all volunteers fill out the Volunteer Application Form so the information can be used for contacting the volunteer and also assigning them to positions.

Retention

The retention of volunteers is an important component of the continuity and stability of the event. Volunteers want to feel valued, supported, recognised and rewarded for their time and effort they have given for the event and it

cannot be stressed how important this is. If they feel like this has occurred in their interactions with the volunteer co-ordinator and other event organisers, there is a strong chance that they will continue to volunteer for the event in future years. This will mean that the event has the potential to gain loyal, reliable and effective volunteers.

Recognition and reward systems do not need to be complex, expensive or hard to implement and manage. The committee should be encouraged to brainstorm and create ideas and utilise resources to provide recognition and a reward system that makes volunteers feel that the amount of effort they put into the event is equal to the recognition and reward.

Reward and Recognition System

Acknowledgement and appreciation needs to be given for the time given or 'service'. It is essential that the type and level of recognition is relevant to the level and type of involvement. This will ensure the recognition won't lose its impact.

Be Consistently Applied

Any program or process must be administered consistently to get results in which you are looking for. Therefore, monitoring the volunteers and having processes in place to ensure programs do run smoothly are strongly recommended.

If a program is not monitored, the chances are it will not be successful or work to its full potential. For example, having volunteers recruited and not briefing them on what they are required to do is simply going to lead to an unsuccessful event.

Volunteer Thankyou/Recognition Certificate

A certificate of recognition will allow volunteers to feel appreciated and that they as an individual were recognised. This can be done through

completing a Thank You certificate and personalizing it to their name and sending it to their specified postal or email address. It is also important that the signatories are relevant. The signature on the certificate is that of the Volunteer Coordinator (as superior) and that of the Event President (from a higher respect). Completing this process will give them a sense of recognition and potentially motivate them to continue volunteering for the event in the future.

Volunteer Briefing and Training

Volunteer briefing is educating volunteers on the event itself, while volunteer training is about their role specifically.

Volunteer training can be described as educating volunteers to do be efficient, knowledgeable, and skilled at the role they have been assigned to. While, volunteer briefing can be described as educating volunteers by providing information about the event, how volunteers are expected to conduct themselves, what their role involves and what responsibilities this includes.

Volunteer training often comes first (although not always necessary), with volunteers enrolling in the relevant training and being provided with the information and resources required. This kind of training could include being assigned to registration at an event, and the volunteer must be educated on the relevant processes this involves.

Volunteer Training

Providing volunteers with the resources and information they need, not only to do their role effectively and efficiently but also to become an essential part of the team, is a rewarding experience for both the volunteer and event organisers.

The volunteers that event organisers train vary from the volunteers that provide first aid during the event to the event's management committee.

There are a number of organisations and support networks that help event organisers to identify what resources, steps and processes are involved in adequately training a volunteer. Alternatively, there are also funding opportunities available to event organisers that aim to help up-skill volunteers and provide the resources necessary.

Information on relevant grant funding sources can be found on the [Volunteering Queensland](#) website (check for open Volunteering Grant Funding rounds). Additionally, event organisers can also visit the [Volunteer Grants website](#).

Volunteer Briefing

Briefing volunteers is the key to success for any volunteer recruitment program, because if volunteers are not briefed adequately they will not have a clear understanding of what is required of them for the event. Therefore, inductions should be held which will allow the volunteers to be provided key information about the event so they know what to expect. Key information which should be covered in the induction includes;

- Dress codes
- Procedure for checking in on the day
- Site maps of the event and race course if it applies
- Description of positions
- Where facilities are such as toilets, administration, volunteer tent, etc.

It is vital that volunteers are given a clear direction and enough information that they feel adequate to answer questions that participants of the event may have. If volunteers feel able to answer enquiries about the event, this is an indication that the briefing information has been suitable.

Review

The review stage in the event involves the feedback and evaluation of the Volunteer Management Plan. Throughout this stage event organisers or the volunteer coordinator are required to evaluate how the event went and whether or not it was successful. This stage also allows management to create an understanding and knowledge of what needs to be improved in the following years for the event to continue to be a success. This can be determined through surveys in particular, which should be filled out by all volunteers.

Volunteer Survey and Results

Developing a volunteer survey should be carried out annually after the event to measure volunteer satisfaction and to also obtain feedback on positive and negative aspects of their experience.

Volunteer Policy

A policy is a set of rules decided on by an organisation. Everyone within the organisation must abide by the policies at all times, including volunteers. Volunteers are a huge part of an event and are often perceived as the 'face' of the event for participants, as they are the first to be contacted when an enquiry arises.

Rights and Responsibilities of Volunteers

Volunteers, although not paid, have rights and responsibilities which they should be made aware of, particularly when they first start their services. It is imperative that these rights and roles are understood and complied with by both the event organiser and volunteer.

<p>Volunteers have the right to:</p>	<ul style="list-style-type: none"> • An orientation to the event • A clear job description • Experience satisfaction • Support and respect from the event personnel and co-workers • Guidance from Volunteer Coordinator and/or team leaders • Insurance and safety • Know who they are accountable to and have defined channels of communication open to them • Know what tasks they will be expected to perform and say 'no' to tasks they are unable to do or do not want to do
<p>Volunteers have the responsibility to:</p>	<ul style="list-style-type: none"> • Be sure they have time to take on the position/task • Be loyal – offer suggestions, but don't 'knock' other people's ideas • Be willing to learn • Be willing to be directed • Welcome supervision – you will do a better job and enjoy it more • Speak up – ask about things you don't understand • Be dependable – do what you agree to do • Be a team player – respect the function of other staff and treat them fairly • Provide feedback on the work being done

Code of Conduct

The Code of conduct is a set of principles and expectations binding every volunteer who is part of the event. The purpose of a Code of Conduct is to:

- Ensure all volunteers are aware of what is expected of them, and also how they should expect the organisation to behave
- Ensure that all volunteers contribute to the goals and objectives of the event by making them aware of all relevant policies and aims of the event

Topics covered in the Code of Conduct should include confidentiality, non-discrimination and equity, conflict management, alcohol and drug use, limitations, non-compliance, and dismissal processes of the volunteer if they fail to adhere to the code of conduct.

Dismissing a Volunteer

In a situation where the volunteer has breached the code of conduct or there is no other reasonable action but to dismiss a volunteer, there are a number of steps in which the volunteer coordinator or member of the management committee must take.

Firstly, a certain attitude towards the problem should be upheld. The following guidelines can be used:

- Approach the problem as soon as possible
- Discuss the issue in a calm and objective manner
- Keep the discussion focused on the behaviour, not the person involved
- Allow the volunteer to explain their position
- Obtain agreement on how mistakes/behaviour can be prevented in the future
- Give a warning before any disciplinary action is taken
- Consider the effect on the disciplinary action and any mitigating circumstances
- Ensure all disciplinary action is consistent – use precedents if possible

The decision to dismiss a volunteer should not be taken lightly and should never be done by a single individual. The event committee in perfect circumstances should be involved in the following process:

- Approach the committee and speak to the event chairman/CEO/manager/president
- The president's approval to dismiss the volunteer should be obtained
- Dismiss the volunteer in person and in private – always be honest, sensitive and firm
- Document the dismissal and file it in a way that the volunteer is not unwittingly taken on again
- Follow up with a short, neutral report confirming the dismissal and reason for dismissal to be evaluated for all concerned parties

Risk Assessment and Management

Risk has been defined as “the possibility that human actions or events lead to consequences that harm aspects of things that human beings value” (Klinke and Renn, 2002). This definition in terms of event management will change to “the possibility that human actions or events lead to consequences that harm aspects of things that the event values” which would include competitors, attendees, spectators and other stakeholders, as well as creating a financial detriment and negative reputation.

Risk Management Process

Risk Management Organisational Structure and Responsibilities

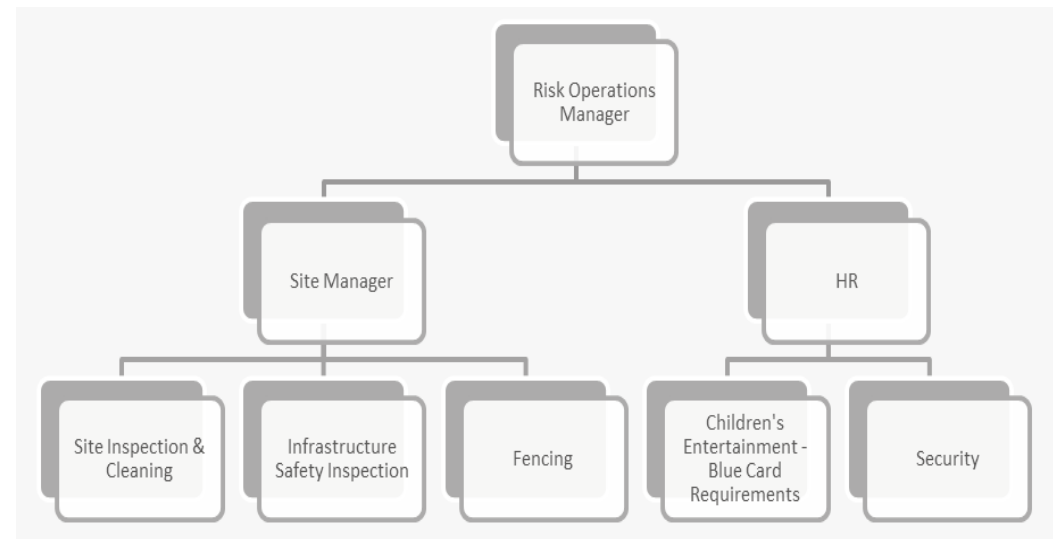
An organisational structure is a great way to show who will be in charge of the whole operation, who will be responsible for each area, who will be in charge of security, site cleaning/inspection, setting up safe infrastructure, etc.

The purpose of an organisational structure is to provide guidance to all event staff by laying out the official reporting relationships that govern the workflow of the event.

Without a formal organisational structure, event staff may find it difficult to know who they officially report to in different situations, and it may become unclear exactly who has the final responsibility for what. Organisational structure improves operational efficiency by providing clarity to employees at all levels of an event. By paying mind to the organisational structure, departments of an event, such as volunteers, marketing, sponsorship, logistics, and so forth, can work more like well-oiled machines, focusing time and energy on productive tasks.

In regards to Risk Management, it is essential a structure if formed so that if a volunteer (who has no previous knowledge of how the event is structured) comes across a problem, they know who is the most appropriate person to call to ensure the problem is resolved as quickly as possible.

At right is an example of an organisational structure an event might implement. Other example positions that could be listed in the structure could be communication coordinator (the person that will be responsible for contacting emergency services), the volunteer coordinator (listed to brief volunteers on what their safety responsibility is), first aid officers, and the logistics coordinator.



Risk Management Process - Flow Chart

The Risk Management Process is a very simple concept, in terms of how you come to the identified risks. The below flow chart shows the different elements in which a risk is identified and how this forms into an action plan, which is then implemented at the event.

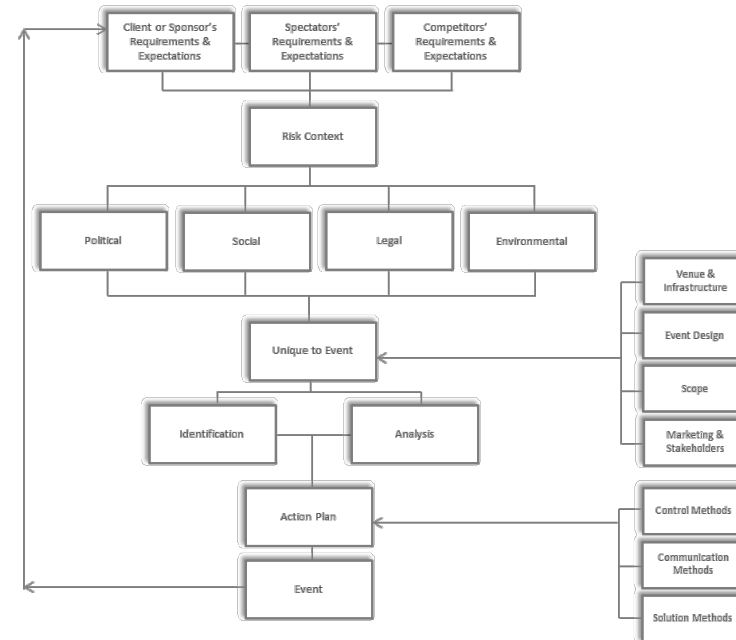
What is it that your sponsors, spectators and competitors are expecting from your event?

As an example, there are certain requirements and expectations sponsors, spectators and a crowd may want when competitors have finished a race and are presented their awards:

- Sponsors want to see their logo/signage up on the stage, and a large crowd facing that signage
- Spectators want to see a stage that is viewable no matter where they are in the crowd
- Competitors want to be up on the stage and for everyone to see them get an award

In terms of process, you now have a large stage that is considered an expectation of your stakeholders, so what then would you consider to be the political, social, legal and environmental risk factors that have come from those expectations?

Political	Have you got the signage up on the stage of your local council if they have sponsored you?
Social	What happens if you give the award to the wrong person and it is later made public, how will that impact your event?
Legal	What happens if somebody falls off the stage and decides to take legal action and sue you?
Environmental	Does that staging impact on the grass it is located on – if it is there for too long will it kill the grass?



Key Contacts

The key contacts are the relative stakeholders that are part of the Risk Management Process, such as:

- Safety services – e.g. Ambulance, St Johns, Lifesaving club, Police, Fire Brigade.
- Permit stakeholders – e.g. Local/State/Federal Government, Maritime Safety, Police.
- Event stakeholders – e.g. event manager, event coordinator, site manager, logistics manager.
- Transport services – e.g. taxi and bus companies

A simple list of contacts like the below should be an essential part of your Risk Management Plan. You can add more or have less contacts or details depending on your event needs.

Contacts		
Event Organisers/Main Contact: Telephone (Mobile): Email:		
Site Manager: Telephone Number: Email:		
Site/Infrastructure Coordinator: Telephone (Mobile): Email:		
Event Security: Telephone (Mobile): Email:		
Traffic Control: Telephone (Mobile): Email:		
First Aid/ St. Johns: Telephone (Mobile): Email:		
Bus Company Telephone (Mobile): Email:		
Emergency Services:	Emergency: Non-Emergency: Ambulance: Telephone (Mobile): Email:	Dial 000
	Fire Brigade: Telephone (Mobile): Email:	
	Police: Telephone (Mobile): Email:	

Insurance

Events, no matter what is involved must have insurance to cover anything from the participants, infrastructure, weather, finances and much more. What insurance do you currently have in place, or require, ensuring risks to the event and relevant stakeholders are safe?

List all of the types of insurances you currently have in place to cover your potential event risks, what your insurance covers (be as specific as possible), what your insurance does not cover, who your insurance is covered by and the relevant contact details for the person who has issued the insurance, what timeframe the insurance is valid for and when the payments are due inclusive of how much the insurance is and the frequency of payments.

Insurance type	Policy coverage	Policy exclusions	Insurance company and contact	Insurance Coverage timeframe	Payments due
<i>[e.g. Public Liability Insurance]</i>	<i>[e.g. event attendees, partners, sponsors, organising body, committee]</i>	<i>[e.g. Fraud, terrorism, tsunami, landslide]</i>	<i>[e.g. XYZ Insurance, D.Higgins (Area code) Number]</i>	<i>[Day/Month/Year] to [Day/Month/Year]</i>	<i>[Amount you pay and frequency. e.g. Monthly, yearly]</i>
<i>[e.g. Supplier's Insurance]</i>	<i>[e.g. Food, alcohol, infrastructure]</i>	<i>[e.g. Event attendees]</i>	<i>[e.g. ABC Insurance, C.McCormack (Area code) Number]</i>	<i>[Day/Month/Year] to [Day/Month/Year]</i>	<i>[Amount you pay and frequency. e.g. Monthly, yearly]</i>
<i>[e.g. Event Cancellation, non-appearance, weather insurance]</i>	<i>[e.g. Cyclone, flood, drought, failure to show, financial failure]</i>	<i>[e.g. Registration reimbursement]</i>	<i>[e.g. 123 Insurance, S. Mitchells (Area code) Number]</i>	<i>[Day/Month/Year] to [Day/Month/Year]</i>	<i>[Amount you pay and frequency. e.g. Monthly, yearly]</i>

Risk Management Tools

This section of the guide introduces a number of tools that you can be using to develop your risk management plan. These tools can be the answer to what ways will you communicate to your team, suppliers and emergency services if required, how will you assess your risks and how will you evaluate your risks.

Risk Management Communication Plan

Ensure you list the channels in which you will communicate with your event team, such as mobile phones, two-way radios, sirens, or another creative method.

If using two way radios, a list of phrases or words that will be used should be outlined below in the table provided. The radio channel your event stakeholders will use must also be noted.]

[Find more popular words/phrases and their corresponding meanings by clicking here](#)

Word/Phrase Used:	Meaning:
E.g. Over	I have finished talking and I am listening for your reply

Two-way Radio Channel Plan

Note those stakeholders listed in your organisation structure and which channel they will be using, it is also important to note which channel they will be responsible for e.g. The Event Organiser or the Course

Manager will be responsible for both channels as they are the one communicating.

Stakeholder	Main Channel	Responsible for:
Event Organiser	13	13,14
Traffic Control	14	14
Police	13	13

Precedent Cases

Exploring case studies of similar events that have experienced some kind of event risk, tragedy or harm is an effective way in identifying potential risks that may not have been identified.

Risk Assessment Tool

As part of any Risk Management Plan, it is important to accurately identify and assess the risks involved with the specific event. The risk assessment will form the most important part of your event's Risk Management Plan.

It is important to identify the difference between the hazard, the risk, and the result.

Hazard: *this is anything that has the potential to cause harm (a peg in the ground)*

Risk: *this is the chance that someone could be harmed by the hazards you identify (tripping on peg)*

Consequence: *this is how the receiver may be harmed (broken toe after tripping on peg)*

Spot the Hazards

Plan your event on paper. Then think about the hazards relating to the individual activities and don't forget any equipment. A hazard is something with the potential to cause harm. Only note hazards that could result in significant harm. The following should be taken into account:

- Any slipping, tripping or falling hazards
- Any vehicles driving onto the site
- Poor lighting, heating or ventilation
- Hazards relating to fire risks or fire evacuation procedures
- Electrical safety e.g. use of any portable electrical appliances
- Any possible risk from specific demonstrations or activities
- Any chemicals or other substances hazardous to health e.g. dust or fumes
- Manual handling activities
- Traffic control
- Moving parts of machinery
- High noise levels and Crowd intensity and pinch points

Decide if someone could be harmed and how:

For each hazard identified, list all those who may be affected. Do not list individuals by name, just list groups of people. The following should be taken into account:

- Stewards
- Vendors, exhibitors and performers
- Potential trespassers
- Employees
- Members of the public
- Expectant mothers
- Volunteers
- Disabled persons
- Local residents

- Contractors
- Children and elderly persons

Areas to consider:

- Type of event
- Crowd control, capacity, access and exit and stewarding
- Fire, security and cash collection
- Potential major incidents
- Provision for the emergency services
- Health and safety issues
- Site hazards including car parks
- Provision of first aid
- Exhibitors and demonstrations
- Types of attendees such as children, elderly persons and the disabled
- Provision of facilities
- Amusements and attractions
- Structures
- Waste management

This list is by no means exhaustive - event organisers should consider what hazards will be presented at the particular event.

Risk Assessment Tables and Matrix

Once a risk has been identified, it is important to estimate the likelihood of the risk occurring, and then whether it has the potential to do substantial damage. The likelihood and the impact must then be standardised into a rating. The rating will then help organisers to prioritise risks and then minimise the risk as much as possible. Use the tables below when assessing the risks.

LIKELIHOOD – What is the likelihood of the situation occurring?

Level	Descriptor	Example Detail Description
A	Almost Certain	Is expected to occur in most circumstances
B	Likely	Will probably occur in most circumstances
C	Possible	Might occur at some time
D	Unlikely	Could occur at some time
E	Rare	May occur but only in exceptional circumstances

CONSEQUENCE – What is likely to be the impact of the situation occurring?

Level	Descriptor	Example Detail Description
1	Insignificant	No injuries Low financial loss.
2	Minor	First aid treatment Temporary halt of event Medium financial loss.
3	Moderate	Medical treatment required Temporary halt of event requiring outside assistance (e.g. specialised maintenance, fire, police) High financial loss.
4	Major	Extensive injuries - hospitalisation required Loss of production capability Half of event requiring investigation and outside assistance (e.g. fire, police, and ambulance) Major financial loss.
5	Catastrophe	Death Halt of production with investigation and potential prosecution (e.g. fire, police, ambulance) Catastrophic financial loss Event likely to cease.

Using the tables above, the risk rating matrix can be used in the Risk Management Assessment to categorise the likelihood and impact of the risks listed (the risk management assessment can be seen below).

LIKELIHOOD	Consequence				
	Insignificant 1	Minor 2	Moderate 3	Major 4	Catastrophe 5
Almost Certain - A	H	H	E	E	E
Likely - B	M	H	H	E	E
Possible - C	L	M	H	E	E
Unlikely - D	L	L	M	H	E
Rare - E	L	L	M	H	H

Risk Ratings (to be used in Risk Assessment Table):

- E = Extreme Risk – Immediate action required
- H = High Risk – Senior management attention needed
- M = Moderate Risk – Management responsibility must be specified
- L = Low Risk – Manage by routine procedures

Risk Management Plan

The Risk Management Plan (RMP) is an important document outlining the risk, stakeholders involved, responsibility, control method, risk category, strategy plan, and backup plan. After identification and analysis tools have been used, the Risk Management Plan can be developed and effectively implemented. The RMP can be implemented into a simple excel table and will be an effective way of displaying the information.

will the event team handle risks, what communication will you use, what steps must be taken. Below is an example of a potential contingency plan.

Contingency Plan

It is important that when an incident occurs, stakeholders and those responsible understand the process in which the incident will be identified, controlled, and then noted for review and evaluation. How



Documentation Required

The following is a checklist and all documents are recommended to be finalised prior to the commencement of an event. This is not an exhaustive list; it should be modified for each event and the requirements of that event

Public Insurance	Liability	<input type="checkbox"/> Public Liability Insurance cover (Certificate of Currency) for the Event and/or Event Organiser to the value of \$10 million; <input type="checkbox"/> Public Liability Insurance cover (Certificate of Currency) for all Food Vendors; <input type="checkbox"/> Public Liability Insurance cover (Certificate of Currency) for the Licensed Children’s Entertainment Equipment/ infrastructure/ general suppliers/ contractors/ consultants.
Risk Management and Event Safety Plan		<input type="checkbox"/> Risk Management Plan including Evacuation Plan and Wet Weather Plan; <input type="checkbox"/> Event Safety Plan.
Traffic Management Plan		<input type="checkbox"/> Public Transport/Traffic Management Plan; <input type="checkbox"/> Letter of No Objection from Infrastructure Services of The council for Road Closure – Road Closure Permit.
Temporary Infrastructure		<input type="checkbox"/> Temporary Structure Certificate/Interim Certificate of Classification for staging – if structure is over certain height and weight – council building permit is required
Park Hire		<input type="checkbox"/> Community Event Agreement from Community Services of the council for Park Hire – Park Hire Permit
Police		<input type="checkbox"/> General Permit (Transport Operations – Road Use Management Act 1995) from Queensland Police Service.
Others		<input type="checkbox"/> Run Sheet <input type="checkbox"/> Event Site Map <input type="checkbox"/> Letterbox Drop – Road Closure Notice to Residents <input type="checkbox"/> Road Closure notification for Road Closure Times/Dates

Consultation with Key Stakeholders

The following consultation meetings should be identified and scheduled and put into a table.

Planning Meeting

Regular planning meetings between the Event Coordinator, Local Site Coordinator, Queensland Police representative and the council representative should be planned. Regular meetings are encouraged so that come festival weekend, all permits are confirmed and all stakeholders have met the requirements.

Briefing – Before Event

The final briefing should be onsite prior to the event start, to confirm that all requirements have been met. An onsite inspection should also be encouraged so that the park condition can be agreed upon. This will prevent any accusations/disagreements of the condition of the park (who is responsible) after the event weekend.

Debriefing – After Event

After the event, those stakeholders involved, as previously mentioned, and should attend a de-briefing session to discuss the happenings of the event and any important material that should be noted down for future years of the event.

Council Meeting

If you have an agreement in place with the council, it will be important to schedule the debrief after the completion of the event to ensure all agreement conditions were met. This will ensure that all potential issues can be resolved with the council so that the event can go ahead the next year.

Type	Date	Who	Where
Planning Meeting			
Briefing Meeting			
Debriefing Meeting			
Council Meeting			

Planning for the Event

What strategies are you putting in the following areas, are there certain restrictions the event organisers will need to consider, who are the stakeholders that will be in place to monitor, what equipment and ‘rules’ will be in place to manage.

- Signage
- Noise
- Monitoring and Management
- Complaints
- Weather
- Food
- Sun Safe Practices
- Smoking

Object	Checked/Reviewed Date	Person responsible
Emergency management and recovery plan	[Day/Month/Year]	[e.g. J. Smith]
Emergency and recovery contacts	[Day/Month/Year]	[e.g. J. Smith]
Insurance documents	[Day/Month/Year]	[e.g. J. Smith]
Financial documents	[Day/Month/Year]	[e.g. J. Smith]
Torch	[Day/Month/Year]	[e.g. J. Smith]
First-aid kit	[Day/Month/Year]	[e.g. J. Smith]
Portable radio	[Day/Month/Year]	[e.g. J. Smith]
Plastic bags	[Day/Month/Year]	[e.g. J. Smith]
Spare batteries	[Day/Month/Year]	[e.g. J. Smith]
Adhesive tape	[Day/Month/Year]	[e.g. J. Smith]
Pen/pencil and notepad	[Day/Month/Year]	[e.g. J. Smith]

- Water
- Lighting and Power
- Toilets
- Fencing
- Entry and Exit Details
- Lost Property

What strategies are you putting in the following areas, are there certain restrictions the event organisers will need to consider, who are the stakeholders that will be involved, what equipment is required and what ‘rules’ will be in place to manage health and safety, how will the information be documented.

- Security
- First Aid and Emergency Medical Services
- First Aid Stations
- First Aid Responsibility
- Emergency Procedure
- Waste and Cleaning

Emergency Kit

What tools, resources, and items will you require in order to ensure your stakeholders have access and ability to handle all emergency situations?

Location

Where is your emergency kit located/stored?

Contents

List the contents of your emergency kit and the date each item was last checked/reviewed.

Analysis and Evaluation

Once the event activities are completed, it is important to analyse and evaluate those ratings given and also identify any potential new risks.

Healthy and Safety Issues

Event Marketing

Marketing Plans are the essence of your event, how will people know about your event if you don't let them know what it is all about!

Marketing doesn't have to be expensive or excessive; it just needs to be planned, clever and continually evaluated. A good marketing plan sets clear, realistic and measurable objectives, includes deadlines, provides a budget and allocates responsibilities, resulting in a 'planned, clever and continually evaluated marketed event'.

You will find a marketing template (sourced from www.business.gov.au) within the Appendix section of this document. All you have to do is fill in the gaps.

Before you complete the marketing plan template and start using it, consider the following:

1. **Do your research.** You will need to make quite a few decisions about your event including structure, marketing and finances before you can complete the template.
2. **Determine who the plan is for.** Does it have more than one purpose? Will it be used internally or will third parties be involved? Deciding the purpose of the plan can help you target your answers. If third parties are involved, find out what are they interested in.
3. **Do not attempt to fill in the template from start to finish.** First decide which sections are relevant for your event and set aside the sections that don't apply. You can always go back to the other sections later.
4. **Use the *[italicised text]*.** The italicised text is there to help guide you by providing some more detailed questions you may like to answer when preparing your response. **Please note:** If a question does not apply to your circumstances it can be ignored for the time being.
5. **Use this marketing plan guide.** The marketing plan guide below contains general advice on marketing planning and a complete

overview with details on each question asked in the marketing plan template.

6. **Get some help.** If you aren't confident in completing the plan yourself, you can enlist the help of a professional (i.e. Tourism Whitsundays) to look through your drafted plan and provide you with advice.
7. **Write your summary last.** Use as few words as possible. You want to get to the point but not overlook important facts. This is your opportunity to sell yourself. But don't overdo it. You want third parties to quickly read your plan, find it realistic and be motivated by what they read.
8. **Review. Review. Review.** Your marketing plan is there to make a good impression. Errors will only detract from your professional image. So ask a number of impartial people to proofread your final plan.

Marketing Plan Template Overview

This template overview provides details on each question asked throughout the marketing plan template as well as links to further information. When you start answering a question in your marketing plan, you can refer to the relevant question below to help guide your answer.

Cover Page

Question	Explanation	More information
Insert your business logo	Adding a logo helps give your business a more professional image.	Always have a variety of versions of your logo – including jpeg., eps., gif., etc.
Your name	Enter the business owner's name. Enter multiple names if there are multiple owners.	
Your title	The titles of the business owner(s) listed above, e.g. Owner/Manager	
Business name	Enter your business name as registered in your state/territory.	Register your business name
Main business address	Enter your main business address. This can be your home address if you are a home-based business or your head office if you have more than one location.	
ABN	Enter your Australian Business Number. If you are a business and have registered for an ABN enter it here.	Register for an Australian Business Number (ABN)
Prepared	The date you finished preparing your marketing plan.	
Table of Contents	If you have changed this template in any way, please remember to update the table of contents to reflect the changes.	

Marketing Plan Summary

Your marketing summary should be no longer than a page and should focus on why your event is going to be successful. Your answers should briefly summarise your more detailed answers provided throughout the body of your plan.

Question	Explanation	More information
The Business		
Business name	Enter your business name as registered in your state/territory. If you have not registered your business name, add your proposed business name.	Register your business name
Business structure	Is your business a sole trader, partnership, trust or company?	Which business structure should I choose?

Question	Explanation	More information
ABN	Enter your Australian Business Number (ABN). If you are a business and have registered for an ABN enter it here.	Register for an Australian Business Number (ABN)
ACN	Enter your Australian Company Number (ACN). Only fill this in if you are a company.	Register your company
Business location	Enter your main business location such as your city/town. Briefly describe the location and space occupied/required.	
Date established	The date you started trading. Whether it was the date you opened your doors or the date your purchased business opened its doors.	
Business owner(s)	List the names of all business owners.	
Relevant owner experience	Briefly outline your experience and/or years in the industry and any major achievements/awards.	Am I ready?
Products/services	What products/services are you selling? What is the anticipated demand for your products/services? These answers should briefly summarise your answers under the main products/services section.	
The Future		
Vision statement	The vision statement briefly outlines your future plan for the business. It should state clearly what your overall goals for the business are. To keep it brief you may prefer to use dot points in your summary.	
Goals/objectives	What are your short and long term goals? What activities will you undertake to meet them?	
Question	Explanation	More information
The Market		

Question	Explanation	More information
Target market	Who are you selling to? Why would they buy your products/services over others? This answer should briefly summarise your answers under the main Market section.	<u>Researching your market</u>
Marketing strategy	How do you plan to enter the market? How do you intend to attract customers? How and why will this work? This answer should briefly summarise your answers under the main Market section.	<u>How do I promote my business?</u>
Question	Explanation	More information
The Finances		
Finances	Briefly outline your sales forecast. How much money will you need up-front? Where will you obtain these funds? What portion will you be seeking from other sources? How much of your own money are you contributing towards the business? Your answers can be quite brief in the summary. They should give the reader a quick idea of your current financial position. Where you are heading financially and how much you need to get there. You can provide more detail in the main Finances section.	<u>How do I manage my finances?</u>

The Business

Question	Explanation	More information
Business overview		
Business overview	Who are the current business owners? What does the business do/sell? Where it is located? How long has it been operating?	
S.W.O.T. analysis		

Question	Explanation	More information
S.W.O.T. analysis table	<p>List each of your businesses Strengths, Weaknesses, Opportunities or Threats (S.W.O.T) in the table supplied. For example:</p> <ul style="list-style-type: none"> ▪ Strengths: (e.g. experience in the industry). ▪ Weakness: (e.g. location of your business). ▪ Opportunity: (e.g. new export opportunity available). ▪ Threat: (e.g. new competitor entering the market). 	
S.W.O.T. activity sheet	<p>List each weakness/threat, the activities you will undertake to reduce/address each and the date of expected completion.</p>	
Product/services		
Product/services table	<p>List each product/service your business currently offers. Provide a description and unit price (including GST) amount for each.</p>	
Market position	<p>Where do your products/services fit in the market? Are they high-end, competitive or a low-cost alternative to the products/services offered by your competitors? How does this compare to your competitors?</p>	
Unique selling position	<p>How will your products/services succeed in the market where others may have failed? What gives your products/services a distinctive edge?</p>	
Anticipated demand	<p>What is the anticipated quantity of products/services your customers are likely to purchase? For example, how much will an individual customer buy in 6 months or 12 months?</p>	
Pricing strategy	<p>Do you have a particular pricing strategy? Why have you chosen this strategy? To help you develop your pricing strategy, you could refer to your customer research, market position, anticipated demand and costs/expenses to get an idea.</p> <p>Whatever strategy you use when setting your price, you will also need to adhere to any relevant fair trading legislation or codes of conduct.</p>	<p><u>Fair trading laws</u></p>
Value to customer	<p>How do your customers value your products/services? Are they a necessity, luxury or something in between?</p>	

Question	Explanation	More information
Growth potential	<p>What is the anticipated percentage growth of the product in the future? What will drive this growth? To help you determine this growth potential, you could refer to your region/industry research to get an idea of any industry/regional growth that could affect your business in a positive way. You could also look up any social trends that may have a positive effect on your business.</p>	<u>Social Trends</u>
Sales/marketing personnel		
Sales/marketing personnel table	<p>List your current staff in the table provided. Outline each job title, name of the employee in the position and the main responsibilities related to the position. You may also like to attach a copy of their resume to the back of your plan.</p>	<u>Employing people</u>

The Future

Question	Explanation	More information
Vision statement	<p>What is your business' vision statement? It should briefly outline your future plan for the business and include your overall goals.</p>	
Mission statement	<p>What is your business' mission statement (i.e. how will you achieve your vision)?</p>	
Goals/objectives	<p>What are your short and long term goals? What activities will you undertake to meet them?</p>	

The Market

Question	Explanation	More information
Unique selling position	<p>How is your business unique in the market? What differentiates your product/service from others in the market? What makes your business stand out from your competition? What product gap or service need does it fill for your customers?</p>	
Your customers/clients		

Question	Explanation	More information
Customer demographics	Define who your target customers are and how they behave. You can include age, gender, social status, education and attitudes. What are their lifestyles, activities, values, needs, interests or opinions? Where are they located?	Social Trends
Key customers	Identify your key customers. (These can be large consumers of your products or individuals whose satisfaction is key to the success of your business.) How will you target your products/service to them? How will you deliver your product/service to them?	
Customer management	How will you maintain a good relationship with your customers? What techniques will you use? How will you keep your customers coming back? Have you introduced customer service standards? Do you follow any particular code of practice?	Customer service Codes of Practice
Your competitors		
Competitors	How do you rate against your competitors? How can your business improve on what they offer?	
Competitor details table	List at least 5 competitors in the table. For each competitor enter: <ul style="list-style-type: none"> ▪ Competitor: Competitor name. ▪ Established date: When were they established? ▪ Size: Number of staff and/or turnover. ▪ Market share (%): Estimated percentage of market share. ▪ Value to customers: Unique value to customers. Why they would do business with your competitor? For example: convenience, quality, price or service? ▪ Strengths: What are your competitor's main strengths? ▪ Weaknesses: What are your competitor's main weaknesses? 	
Market research	What statistical research have you completed to help you analyse your market? Did you use a survey/questionnaire? If so, you may like to attach a copy of your survey/questionnaire to the back of this plan.	Researching your market
Market targets	Outline your planned sales targets. These targets need to be realistic and achievable. What quantity of your products/services do you plan to sell in a planned timeframe? Are they monthly or yearly targets? For example, you may set yourself a goal of selling 1 000 products in 12 months.	

Question	Explanation	More information
Environmental/industry analysis	<p>Detail the results of the market research you have performed. Is the area experiencing population growth? Are there long-term employers in the area? Is the region's economy stable? Are there seasonal variations? What is the size of the market? What recent trends have emerged in the market? What growth potential is available and where do you fit in? How will the market/customers change when you enter the market? What external factors will affect your customers?</p> <p>A good place to start when researching your regional profile is the Australian Bureau of Statistics website. The regional profile information includes economy, population/people, and industry and environment/energy statistics.</p>	<p>Market research and statistics</p> <p>National Regional Profile</p>
Marketing strategy	<p>What is your overall marketing strategy? What steps or activities will you undertake to achieve your goals/objectives? For each marketing activity/milestone:</p> <ul style="list-style-type: none"> ▪ Marketing activity/milestone: Print advertising, online advertising, mail-out, giveaway, media release, event, website, blog/social media, public relations, branding and artwork, or publications and catalogues. ▪ Person responsible: Who is responsible for completing this task? ▪ Date of expected completion: When do you expect to complete the marketing activity? ▪ Cost (\$): Estimated cost of activity. ▪ Success indicator: What indicator/ measurement result will need to be met before this activity is considered a success? 	<p>Marketing and advertising</p>
Advertising and sales		

Question	Explanation	More information
Advertising and promotional strategy table	<p>For each promotion/advertising:</p> <ul style="list-style-type: none"> ▪ Planned promotion/advertising type: What is the promotion/advertising type being used (e.g. Print media advertising, online advertising, SMS, mail-out, giveaway, media release, social media campaign or event)? ▪ Promotional strategy: Why have you decided to use this promotion/advertising type? How and when will you use it? What is your strategy behind this? Who will upkeep your social media presence? ▪ Expected business improvement: How do you expect it will improve your business success? ▪ Cost (\$): What is the cost of each planned activity? ▪ Target date: When do you expect to complete each activity? 	<p>Marketing and advertising</p>
Social media strategy	<p>What do you want to achieve/communicate (brand awareness, online sales etc.)? What social media tools do your customers use (e.g. Blogs, Twitter, Facebook etc.)? What strategies can you use to network and communicate effectively with these customers? Who will upkeep your social media presence? Do you have internal staff or would you need to engage an external organisation?</p>	
Sales strategy	<p>What sales techniques do you use? What are your strategies behind these techniques? How is this different/better than your competitors?</p>	<p>Marketing and advertising</p>
Sales and distribution channels table	<p>For each channel enter:</p> <ul style="list-style-type: none"> ▪ Channel type: What channel will you be using (e.g. Shopfront, internet, direct mail, export or wholesale)? ▪ Products/services: List all the products/services sold via this channel. ▪ Percentage of sales: What percentage of overall sales do you expect to sell via this channel? ▪ Distribution strategy: Why have you decided to use this channel type? How and when will you use it? What is the strategy behind using this channel type for this particular product/service? 	

The Finances

To complete the finances portion of this marketing plan, you should rely heavily on your financial statements and projections. The business.gov.au Business plan template, available at www.business.gov.au/businessplan, can provide you with a start-up costing, balance sheet profit and loss, cash flow and a break-even analysis template.

Question	Explanation	More information
Price	What price have you determined for your products/services? Does this price take into account all your costs including personal, start-up, operational, cash flow and working capital? Have you also allocated a profit margin in your costing? What price will your target market bear? Do your prices take into account any seasonal variation to your suppliers' costs?	
Expected sales	What are your expected sales? When do you hope to achieve these figures? Are there seasonal influences?	
Marketing budget [YEAR] table	<p>Using the table The marketing budget table contains a list of suggested marketing items a typical business may use. When you double click on the table you can edit these items by removing or adding rows and typing in your own items. Remember to clearly display the year in the heading. Please note: The table assumes all figures are GST inclusive.</p> <p>Total formulas When you add your costs, the table will automatically total your items at the bottom of the sheet. If you are adding or removing rows please double-check your figures to ensure the total formulas have been preserved.</p> <p>Attach your own If you have your own marketing budget or your accountant has already prepared one, please feel free to remove the table supplied and attach your own. If it is a large sheet, you can always attach it to the back of the plan and make reference to it from this section.</p>	

Monitoring/measurement activities

Question	Explanation	More information
Monitoring/ measurement	Reviewing the impact of your marketing should be a periodic activity. List the	

<p>activities table</p>	<p>details of each review in the table provided. For each marketing activity:</p> <ul style="list-style-type: none"> ▪ Marketing activity: Print advertising, online advertising, mail-out, giveaway, media release, event, website, blog/social networking, public relations, branding and artwork, or publications and catalogues. ▪ Date of review: (e.g. Month/Year or 6 monthly). ▪ Monitoring methods: What tools did you use to measure/monitor the impact of your marketing activities? ▪ Review outcomes: What were the results for the promotional period? What were your sales/profit figures? How many new/repeat customers did you receive? How many visitors to your website? 	
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Supporting documentation

Question	Explanation	More information
<p>Supporting documentation</p>	<p>List all of your attachments here. These may include resumes, customer survey/questionnaire and/or financial documents.</p>	

Event Evaluation and Reporting

Event evaluation is necessary to make you and your team more efficient and effective, the next time you organise an event. It is all about finding your mistakes and learning from them. Event evaluation should be done immediately after the event is over or the next day. Conduct a meeting with your team members to evaluate your event.

Step 1: Determine the extent to which event and advertising objectives have been achieved.

If you are not able to achieve your event and advertising objectives through your event, then no matter how much people enjoyed the event or how much popularity your event got, it is a complete failure on a commercial level.

Step 2: Get feedback from your clients and target audience.

The most effective and easiest way to gauge your event is through participant feedback. This is typically done via a survey, which can be in hard copy or electronic format.