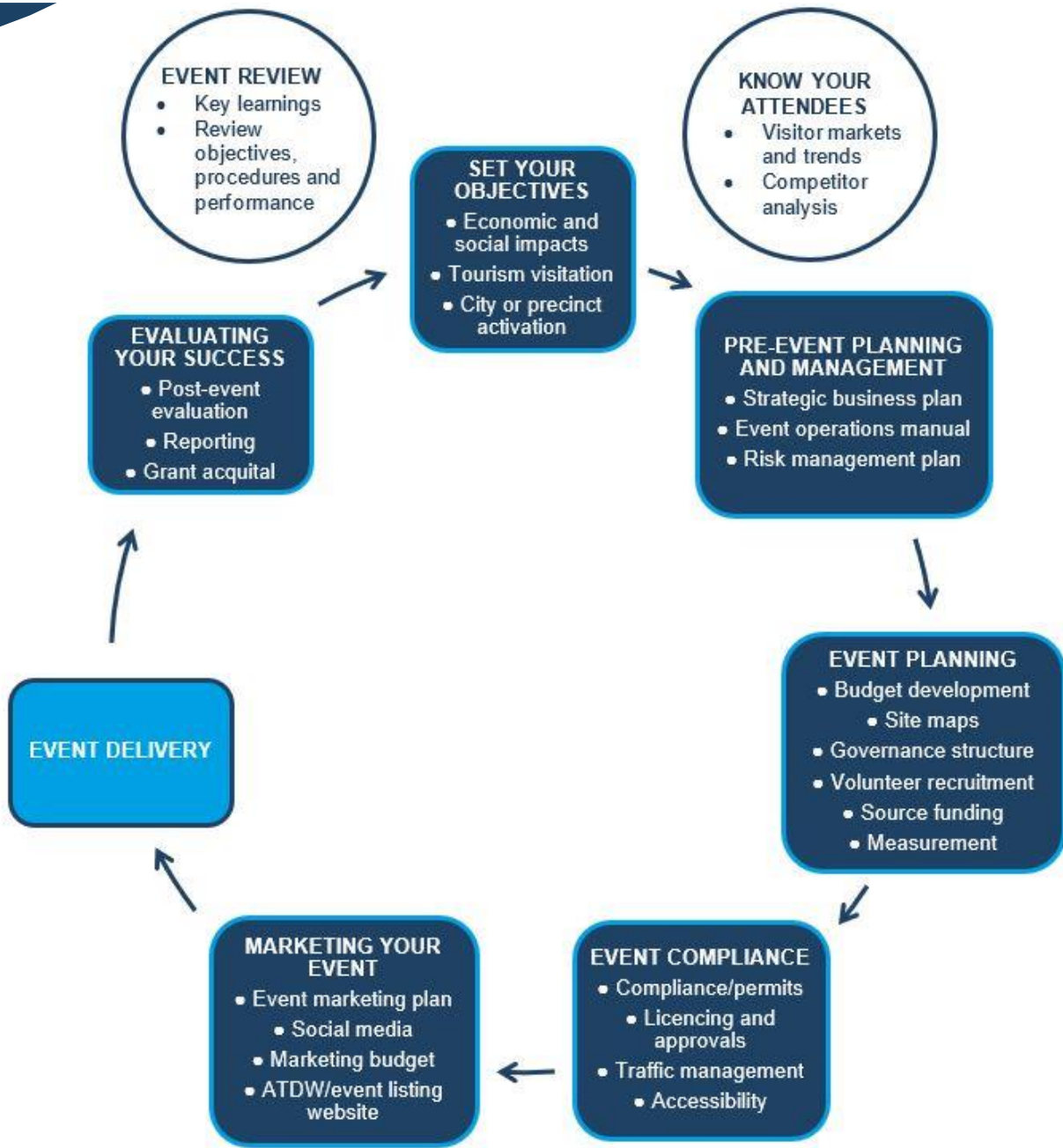


Ballarat Event Planning Toolkit





Steps to managing successful and sustainable events





Resources

Navigate the resources by clicking the links below.

Part A. Event Planning and Management

- Developing a Strategic Business Plan for my event
- Developing and Event Operations Manual for my event
- Developing a Risk Management Plan
- Tips on sourcing funding
- Budget Management
- How to develop site maps
- Governance structure for my event
- Volunteer recruitment and retention

Part B. Event Compliance

- Traffic management
- Licenses, permits and approvals
- Accessibility

Part C. Event Marketing

- Developing an Event Marketing Plan
- Effectively using social media and review sites
- Marketing budgets and tips on how to gain maximum ROI
- Event packaging and bundling tips
- Using Australian Tourism Data Warehouse (ATDW)

Part D. Post-Event

- Post-event evaluation

CLICK THE LINKS THROUGHOUT THIS DOCUMENT TO DOWNLOAD FILES



Image Credit: City of Ballarat

PART A - Event Planning and Management

As an event organiser, your responsibility is to implement effective governance and management processes to ensure your event is managed professionally regarding financial risk, and legal and administrative accountability to deliver the best event possible. The following information and templates are provided to assist you.

1. DEVELOPING A STRATEGIC BUSINESS PLAN

This is the comprehensive ‘who are we and where are we going’ document for your event that helps you identify how to stand out from other events, so you can draw a crowd. It includes establishing the feasibility of your event, setting objectives for your event, and how to measure if you are achieving them. Event organisers of annual events should continually think and plan for the long-term

Topics covered in this Strategic Business Plan template include:

- Event background and details
- Vision and mission
- Values
- Goals, Objectives and Key Performance Indicators (KPIs)
- SWOT Analysis (your event’s strengths and weaknesses, and opportunities for and threats to your event)
- Competitor Analysis
- Organisational Structure
- Committee Roles and Responsibilities
- Partners and Stakeholders
- Volunteer Management
- Finances
- Environment and Conservation
- Branding Strategy

FILE DOWNLOAD: [STRATEGIC BUSINESS PLAN](#)

2. DEVELOPING AN EVENT OPERATIONS MANUAL

This event operations manual template provides you with event management checklists for each month, financial planning information on your venue and your strategies for risk management, marketing and post-event review.

Good planning and management of the months leading up to your event is essential for success. Your event timeline will identify:

- Milestones from beginning to planning until the post-event review
- Every task required to deliver the event
- When each task must be done and by whom

Topics covered in this comprehensive template include:

- Event timeline
- Budget
- Sponsorship
- Grants and funding
- Venue and site plan
- Emergency access
- Risk management
- First Aid
- Insurance
- Program
- Target market analysis
- Unique selling proposition
- Key marketing messages and channels
- Review and evaluation

FILE DOWNLOAD: [EVENT OPERATIONS MANUAL](#)

3. DEVELOPING A RISK MANAGEMENT PLAN

A risk management plan identifies and evaluates areas of financial, safety and legal risk, and how to address potential problems to minimise liability.

Safety risks

The underlying legal issue of safety is duty-of-care, which means taking all possible steps to avoid potential injury to everyone involved. Consider food handling standards, stability of temporary structures, potential fire and trip hazards, alcohol zones, crowd control barriers, and accidental injury or other risks.

Financial risks

Ways of managing financial risk include:

- Setting up an incorporated body with effective governance
- Being clear who is the guarantor should your event lose money
- Setting up good planning and financial management processes
- Allowing enough time to plan your event
- Identifying influencers that could impact your event income
- Focusing on income streams
- Including a contingency in the budget

Legal risks

To avoid legal risks, document your legal obligations, and ensure the event committee is aware of them, then implement controls and monitoring to prevent non-compliance.

[LINK: LEGAL ISSUES TO CONSIDER WHEN HOLDING EVENTS IN VICTORIA](#)

Insuring your event

Insurance is a necessary part of risk management. Seek professional advice to ensure your event has adequate public liability insurance cover for spectators, participants, volunteers, officials and the organising committee. Event organisers are legally responsible for the selection of suppliers, set-up of event infrastructure, ensuring sufficient amenities and accessibility, and addressing health and safety issues. Get advice on other relevant insurances for your event such as pluvious insurance for outdoor events which insures against losses caused by bad weather.

Planning your emergency response

Every event needs an Emergency Response Plan and incident reporting procedure. The way an incident is handled can significantly reduce negative publicity and reputational damage, and even help reduce the risk of legal action. Mobile video and social media commentary from attendees can quickly be used by mainstream media so include in your incident plan how to deal with media and communicate on social media if a serious incident occurs. In your plan, identify who will respond to the incident and who will communicate with the media and on social media. Include in your communications the facts of what happened, and what is being done to right the situation.

Topics covered in this Risk Management Plan template include:

- The importance of a risk management plan
- How to identify and evaluate risks
- Risk mitigation
- Using an incident response plan

FILE DOWNLOAD: [RISK MANAGEMENT PLAN TEMPLATE](#)

4. SOURCING FUNDING

Two sources of income that many events tap into are grants and sponsorship. Whilst they should not be the core revenue stream for any event, they provide a necessary boost to assist events to grow and develop.

Grants

There are many kinds of grants that events can apply for, depending on the events theme and its elements. It is a case of finding a grant that your event aligns with and then ensuring you address the grant's requirements in your submission.

Take the time to seek out grants for elements of your event such as grants for music, sport, art, community engagement or indigenous involvement. To save extra effort in delivering your event, we recommend finding a grant that suits your event as it is planned rather than creating an element to suit the grant.

The City of Ballarat provides grants to tourism events that attract out-of-region visitors and to community events that develop partnerships with the community.

LINK: [CITY OF BALLARAT GRANTS](#)

The Victorian state government provides grants for regional events. The following link will also connect you with portals for arts grants, federal grants and philanthropic grants.

LINK: [VICTORIAN GOVERNMENT GRANTS](#)

Sponsorship

The sponsorship proposal template will help you to create a prospectus to share with potential sponsors that offers a real partnership with clear benefits to both parties. It will help sponsors see how your event aligns with their values and target markets, how you will be marketing the event and its sponsors, and how sponsorship will help the sponsor to meet their own marketing and business goals. Make sure to develop your marketing plan before preparing your sponsorship prospectus so you are basing your sponsorship approach on your marketing objectives

and targets.

The template will help you identify different levels of sponsorship opportunities that provide value for money to your sponsors. Also consider how sponsors could help you with cash or in-kind goods or services (try to ensure that these are budget saving e.g. a sponsor covers the cost of printing all of your collateral).

When approaching potential sponsors, allow enough time prior to the event for your proposition to be given adequate consideration. It is suggested that you undertake your sponsorship pitching at least 8 months prior to your event.

Your prospectus will give you the best chance of developing long-term partnerships that benefit both your event and your sponsors. Use the Sponsorship Agreement template to formalise each party's commitment. If you receive sponsorship, stay in frequent contact with the sponsor to build goodwill and deliver the agreed sponsorship rights.

After your event is held, share your event report with you sponsors to strengthen ties and garner support for future events. Include a letter of thanks stating how their sponsorship contributed to the event's success, benefits delivering for the sponsor, photos (especially those that show sponsor recognition and product activation), and copies of marketing activities such as published press releases.

FILE DOWNLOAD: [SPONSORSHIP PROPOSAL AND AGREEMENT](#)

5. BUDGET MANAGEMENT

The event budget provides direction and is a vital management tool to achieve the event's objectives. Your Treasurer and Executive Committee will likely develop the overall event budget and then allocate funds to other sub-committees or managers, who will manage their budget.

This Event Budget template is designed to allow you to compare budgets year on year, set forecasts, manage cash flow and track budgets, and assess actuals against forecasts at the end of the event. For organisations holding annual events, previous financial records provide a foundation to develop a budget.

Be realistic when estimating income and expenses and remember to plan for GST. Ensure you plan for multiple income streams, such as merchandise, fundraising activities, ticketed events, food and beverage stalls, stallholder fees, etc.), and don't focus all of your income on third party funds such as grants and sponsorship.

Seek advice from an accountant on how to set up systems and financial statements in accordance with standard accounting procedures. To assist with cash flow, try to have income such as sponsorships and funding paid as early as possible and as many costs as possible charged post-event. Consider opening an "event only" bank account to help with bookkeeping. Bank start-up cash in this account and use it for all subsequent income and expenditure.

There is no excuse for event committees to still be using cheques. You can now set up bank accounts that allow for two signature authentications. This makes tracking and reconciling finances much easier.

Ensure the event budget is updated and distributed to your event committee at least one week prior to each meeting. Keeping everyone well informed of how finances are tracking is critical to an events success

How to use the budget template:

1. Complete the detailed budget based on your FORECAST income and expenses. You can use previous years' event figures if applicable.
2. Check that all formulas in the spreadsheet are working correctly.
3. Ensure you have appropriate space to track expenses and invoices.
4. It is recommended that you collate all invoices, pay them and update the budget once per month or fortnight. This will make it more efficient for you.
5. Reconcile the element tabs against the bank statement each month and ensure it is all accounted for.
6. Post-event you will need to chase all income and expenses, insert the details into the appropriate columns and populate all data into actuals in the detailed budget. This will allow you to present your FINAL budget to the committee and stakeholders.

6. EVENT LOCATION AND SITE MAP

Choosing a venue

Choosing the right venue for an event can impact your success. Things to consider when choosing a venue include:

- Availability, capacity (size, audience, space) and cost
- Facilities/equipment available for the event needs i.e. kitchen, furniture, power, stage/AV etc.
- Environmental factors i.e. wind, sun, tree limbs, wet weather contingency etc.
- Accessibility of the venue i.e. pathways, lifts, accessible toilets etc.
- Road closure cost

Council venues for hire

There are a number of venues the City of Ballarat hires out for events. Below is a list of popular Council venues and contact details for booking. If you know of a venue that does not appear on this list, then please contact City of Ballarat Customer Service on (03) 5320 5500.

VENUE	LOCATION	CONTACT
Mining Exchange	Lydiard Street	Her Majesty's
Civic Hall	Mair Street	Her Majesty's
Ballarat Botanical Gardens	Wendouree Parade	Robert Clark Centre, Ballarat Botanical Gardens
Lake Wendouree Foreshore	Wendouree Parade	Parks and Gardens
Buninyong Botanical Gardens	Scott Street Buninyong	Parks and Gardens
Victoria Park	Sturt Street	Parks and Gardens
Eureka Stockade Memorial Park	Eureka Street	Parks and Gardens

Art Gallery	Lydiard Street	Art Gallery of Ballarat
Sporting Grounds (i.e. City Oval, Eastern Oval, Mars Stadium)	Various locations around Ballarat	Sport and Recreation Officer
Parks and other open spaces	Various locations around Ballarat	Parks and Gardens
Road Closures	Various locations around Ballarat	Asset Management Unit

Site Map

The event site map identifies the placement of all event infrastructure and services. Infrastructure includes both temporary and permanent equipment, activities, generator, amenities, parking, vehicle and emergency access, etc

When designing the site plan, factors such as crowd flow and accessibility should be considered. This includes but is not limited to; accessible parking, clear path of travel from outdoors to indoors, clear path ways between infrastructure/furniture for maneuverability, clear directional signage, step free access where possible.

7. GOVERNANCE STRUCTURE FOR MY EVENT COMMITTEE

In Victoria there are three common governance structures to consider for your event committee.

An unincorporated association has no legal standing – in the eyes of the law, it does not exist. The organisation cannot enter into contracts such as grant agreements and members of the organisation are personally liable for its actions. Such an organisation can have an auspicing agreement with a larger incorporated organisation.

The two most common incorporation options for volunteer organisations are incorporated association and company limited by guarantee. Which option is more appropriate for your organisation will depend on:

- How you raise money and how much
- Your organisation's size and administrative capacity
- Your main purpose and activities

LINK: [CHOOSING A LEGAL STRUCTURE](#)

The following Committee Structure and Committee Roles and Responsibilities templates will help you outline who is responsible for each element of your event. They will also help with a smooth transition should committee members change.

FILE DOWNLOAD: [COMMITTEE STRUCTURE TEMPLATE](#)

It's important that you establish reporting systems and lines of communication to keep the members of the organising

committee up-to-date throughout the planning stages. Prepare and distribute a meeting schedule to committee members with meeting frequencies, agendas, dates and times as early as possible in the planning process.

Consider establishing an online form of communication with committee members such as a private Facebook group, a system of group emails, or a shared online document (stored in the cloud such as the free Google Drive or Dropbox). Here all committee members are kept updated between meetings on what members have accomplished to date and activity underway. It can also cut down the amount of times you need to meet face-to-face.

8. VOLUNTEER RECRUITMENT AND RETENTION

A significant issue for many events is recruiting enough volunteers to help run the event. Your volunteers are some of your most valuable assets – it is likely your event could not be held without their support.

Consider requesting support from local service clubs and community groups such as sports clubs or P&C Associations. Offering these groups the opportunity to raise money for their organisation by providing a service to your event such as managing the gates can be helpful in gaining their support. You can also reach out to TAFE and university students (such as hospitality students) and travelling volunteers such as grey nomads or travelling Rotarians.

Consider what tasks volunteers can assist with even if they are not on-site such as accounting or marketing support. Your Committee Roles and Responsibilities document will help you outline the volunteer roles you need filled. Marry this with a timeline or roster before you put the call out for volunteers. This will also help you connect volunteers' skills and interests with job requirements.

LINK: [HOW TO FIND VOLUNTEERS](#)

Your volunteers will require training to make their jobs easier and to ensure they deliver what the event requires. Training can be as simple as a briefing with accompanying printed handouts on their roles and responsibilities. Make sure your volunteers know about the event's emergency plans, communication methods and contacts for the event organisers.

One way to keep your volunteers returning each time you hold your event is to find out what motivated them to get involved and ensure you meet that need or interest. For example, for those who want work experience, connect them with a mentor for skills development, or for those looking for social connection organise fun volunteer gatherings such as a thank you barbeque.

Remember to make a point of thanking your volunteers, illustrating how their help made a difference to your event.

LINK: [VOLUNTEER MANAGEMENT TOOLKIT](#)



PART B - Event Compliance

1. PERMITS

Parking, the hire of public spaces, food events, fundraising, traffic control, use of temporary structures, and liquor sale and consumption are just some of the activities that require approval. It is important that the Event Committee applies for the necessary permits of approval well before the event and can produce such permits on request.

The following permits or approvals may be required at a community event:

- Booking of public open space
- Fireworks and pyrotechnics
- Food registration/approval
- Itinerant sales/commercial activity
- Marine safety
- Liquor licenses
- Noise
- The Australasian Performing Right Association (APRA) and Phonographic Performance Company of Australia (PPCA)
- Places of Public Entertainment (PoPE)
- Public Liability
- Waste Management
- Temporary Road Closure/Traffic Control Application
- Temporary Structures
- Tobacco Sales
- Signage
- Stalls, Displays and Promotions
- Toilet Facilities
- Civic Aviation Safety Authority (CASA)

All relevant permits must be maintained on-site and be made available on request of an Authorised Officer. Non-compliance with any of the conditions or requirements of the permit will render the event permit invalid. The best way to manage this is through the development of an event management plan that includes all of the compliance and regulatory information for your event.

[LINK: CITY OF BALLARAT PERMIT REQUIREMENTS](#)

2. TRAFFIC MANAGEMENT

If the event is going to cause any alteration to normal traffic movement or require any section of road or street to be closed, then you will require a Traffic Management Plan. Due to the sophisticated nature and responsibility that a traffic management plan requires, the Ballarat City Council recommends that a qualified Traffic Management company be consulted and/or engaged to develop and administer all traffic management plans for events.

A traffic management plan should identify the roads/streets to be closed, time of closure and alternate routes. A clearly drawn map of the proposed area must accompany applications for road closures, processions and street activities. You will also be required to notify businesses and residents impacted via a letter box drop and apply for the Memorandum of Authorisation permit from the City of Ballarat Traffic Unit. The application must be received in writing for smaller road closures no less than 28 days prior, and for major road closures at least three months prior to the event.

Depending on the nature of the event and the classification of the road(s), a person may also require approval from Vic Roads and/ or Victoria Police. Council's Traffic Unit will advise if this is necessary.

3. ACCESSIBLE EVENTS

Making events accessible for people with disabilities is a legal requirement in state and federal law. Consider accessibility at the very earliest planning stages of your event. This accessible events guide outlines the best practice, legal responsibilities, planning, transport, promotion, ticketing, technology and communications

[LINK: ACCESSIBLE EVENTS GUIDE](#)

4. INSURANCE

Event organisers must have public liability insurance covering the event for a minimum of \$20 million. A copy of the Certificate of Currency must be submitted to Council along with the application for a Council permit. Event organisers are encouraged to arrange an appointment with the City of Ballarat's event unit to discuss the compliance requirements of their event in the early stages of planning.



PART C - Event Marketing

Planning your marketing is planning for success. Your marketing plan sets the direction for maximising your event results and is also essential when applying for grants and sponsorship.

1. DEVELOPING AN EVENT MARKETING PLAN

Event marketing is about getting your messages across to your target markets at the right time and in ways that compel them to come to your event and be passionate advocates to friends and family.

Traditional marketing channels include advertising on TV, radio and in print publications such as magazines; distribution of posters, flyers, banners and signs; and mailouts to potentially interested groups and individuals, as well as press releases to media.

Digital channels include your website, your database of contacts for email newsletters, and social media – both your own posts and engaging on the pages and posts of other relevant social media accounts.

Your marketing can consist of paid media or advertising you pay for, such as Google AdWords search engine ads and Facebook ads; media you own, such as your website, blog and social media accounts; and earned media, such as consumer reviews, shares of your social media posts and user-generated content such as photos of your event your attendees take and post on social media.

Do not forget to integrate into your planning, and leverage, the marketing of local, regional and state tourism bodies, local businesses and tourism operators, and stakeholders and supportive partners. Engage on their social media posts, organise cross promotion, and see if they can share information about your event to their email databases and social media networks. Collaborative marketing is extremely powerful for events.

Topics covered in the Event Marketing Plan template include:

- Marketing objectives and Key Performance Indicators (KPIs) for evaluation
- Target audiences
- Content marketing and storytelling
- Marketing budget
- Marketing action plan and timeline

FILE DOWNLOAD: [EVENT MARKETING PLAN TEMPLATE](#)

2. EFFECTIVE USE OF SOCIAL MEDIA AND REVIEW SITES

Social media is one of the most targeted and cost-effective channels for promoting your event and is perceived by visitor markets as providing trustworthy content. The social media gold is when your audience become your advocates and promote the event for you via social media channels – provide an exceptional experience and watch this happen.

Topics covered in this Social Media Guide include:

- Things to do before you start social media
- Content marketing
- When, what and how frequently you should post
- How to create content at the event
- Facebook
- Instagram
- Collaborate, partner, amplify
- Leveraging influencers to build an audience
- The Australian Tourism Data Warehouse (ATDW)
- Free event listing sites
- Useful tools
- Where to find free images
- Content calendar
- Content inspiration and ideas

FILE DOWNLOAD: [SOCIAL MEDIA FOR EVENTS](#)

3. ATTRACTING MEDIA AND NEWS STORIES

We often use events to engage metropolitan and national media, with a focus on those events that will increase visitation into the region. This is done via tailored public relations campaigns engaging major print publications, online and broadcast across national, metropolitan and local media outlets.

Media outlets work to many different deadlines which means it is important for events to have information and content ready and available well in advance in order to gain media exposure opportunities.

Here is a useful guide outlining a summary of the Australian media deadlines that should be met in order to maximise coverage for your event.

FILE DOWNLOAD: [NATIONAL AND METROPOLITAN MEDIA GUIDELINES](#)

4. EVENT PACKAGING AND BUILDING

Collaborative event marketing presents a powerful opportunity for events. If you have an opportunity to work with other operators throughout Ballarat to create packages and/or bundled experiences that suit your target audience, you will further extend your marketing reach.

What is the difference between packaging and bundling?

Packaging is the process of creating an experience with one price point e.g. accommodation, event tickets, flights and dinner for two at a local restaurant for \$XYZ. Bundling is the process of bringing together similar themed experiences via suggested itineraries or multi-day experiences to show prospective visitors that there is more to do in the region around the event e.g. a cycling event will create 2-3 day itineraries that include food, wine and boutique shopping experiences throughout the region, with the view to encourage participants to stay for a few days.

Events that are interested in exploring opportunities around bundling and packaging should get in touch with our events team.

5. USING AUSTRALIAN TOURISM DATA WAREHOUSE (ATDW)

ATDW is a national database of information about tourism businesses and events, compiled in a set format for easy, automatic distribution through other websites, such as www.visitvictoria.com. Listings for events are free.

FILE DOWNLOAD: [HOW TO CREATE YOUR ATDW LISTING](#)

FILE DOWNLOAD: [CHECKLIST OF FREE EVENT LISTING WEBSITES](#)



PART D - Post-Event Reporting

Our comprehensive Post-Event Evaluation Report template will help you with acquitting grants from funding bodies and providing details to stakeholders. It will also enable you to see if you met your own objectives for your event, identify what worked well and where improvements are needed. This information is critical to assist in your long-term planning to ensure the sustainable growth of your event.

Topics covered include:

- Event Details
- Attendees
- Organisation Structure
- Volunteer Management
- Post-Event Evaluation
- Event Surveys and Feedback
- Committee Debrief
- Program Outcomes and Recommendations
- Site Plan
- Site Preparation and Operations
- Traffic Management and Car Parking
- Festival Income Streams
- Income and Expenditure Breakdown
- Sponsorship and Grants
- Marketing and Partnerships
- Media Spend
- Media Coverage
- Website and Online Ticket Sales
- Packaging and Partnerships

FILE DOWNLOAD: [POST-EVENT REPORT](#)

FILE DOWNLOAD: [VISITOR SURVEY](#)

FILE DOWNLOAD: [STAKEHOLDER SURVEY](#)

FILE DOWNLOAD: [SPONSOR SURVEY](#)



Image Credit: Visit Victoria