ENGINEERING EVENTS

A Comparison of the standard
Project Management Methodology
with the Management of Events and
Festivals.

by

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The Event Management Body of Knowledge executive committee, who have taken an idea and created an international team to take it forward to the world.

To my family whose support has been unyielding.

Bill O'Toole 2005

CONTENT

Glossary of Terms : Definitions and discussion of the terminology used in the thesis

The glossary was created by the author of this thesis. All the definitions are placed in the context of event management to clarify the text of the thesis. Any definitions copied from other texts are referenced accordingly.

Analysis - studying a subject by breaking it into its component parts, with the aim to identify the relationships between the parts.

Attendee - any person at the event other than the staff or suppliers. They may be referred to as spectators, competitors or audience,

Baseline plans - management plans at the beginning of the event management that is during the initiation phase. Often they are adapted from previous similar events. They provide the starting point and a measure for all the changes that will occur. An example of this is the event budget. Although this may be accurate at the time of creation, it will change.

Benchmarks - identifiable points in the management of an event where a high standard is achieved

Breakeven point - the point at which the expenses of the event are equal to the revenue. It can be expressed in a parameter of the event such as number of attendees, square meters of exhibition space sold or sponsorship commitments.

Checklist - the event checklist is a list of mini tasks that need to be completed. Often they are more correctly described as a 'prompt list' - a way of remembering what needs to be accomplished. As the checklist is simple, understood by everyone and can be updated quickly it is always employed throughout the management of the event.

Commitment account - the record of the event costs as they are agreed with the suppliers. This is different to the cash account as it immediately tells the event manager how much has been committed and will be spent. It is essential in events, as the invoicing may take longer than the time to plan the event.

Communication plot - a table showing the various types of communication at an event and the contact details of the staff and suppliers

Complexity - refers to the number of parts and the number of relationship between the parts. Note that this is a relative definition rather than an absolute. It will depend on the 'graininess' of the decomposition of a project. A characteristic of a complex system is that is impossible to identify the property of the whole system by 'summing

the parts'. According to Williams this is a major limitation in the use of analysis - the decomposition of a project into its parts as a method of management is fundamental to traditional project management. Gell-Mann has the following definition of 'crude complexity " the length of the shortest message that describe a system, at a given level of coarse graining, to someone at a distance, employing language, knowledge, and understanding that both parties share (and know they share) beforehand" (Gell-Mann 1994, p. 35). Flake's definition includes complexity as a measure of how interesting something is (Flake 1998, p. 446). Both these definitions include the familiarity of the system to the people observing it.

Coordinate - coordinating an event involves working with the suppliers to assist them in meeting the event objectives. As these objective may change the coordinators role is also to harmonise these changes and direct the common effort toward the success of the event. It implies a person equal in rank to the suppliers. The two way communication between the suppliers - or subcontractors - and the coordinator is fundamental as the coordinator needs timely relevant information to understand the requirements of the suppliers and to direct the suppliers in satisfying their needs for the event.

Cost Benefit analysis - the identification of the various costs and benefits of an event. The event costs are often straightforward. However many events have intangible benefits. Modern accounting can estimate these benefits in financial terms. An example of an intangible benefit is 'community feeling'.

Cost Centres - grouping the costs of an event for better cost management. It generally reflects the functional areas of event management such as operations, publicity and administration.

Cost Plus contract - an agreement whereby the cost of the event is passed onto the sponsor or client and the event company is given a margin or a fixed amount above the costs.

Highly Coupled System - an aggregation of components, whereby each component is depended on the state of the others. This system is characterised as a complex array of interdependencies. For event management this means that an action in one area of the event will have consequences in other areas not directly related to it. For example, if there is a change of event program such as, a new performer/artist or speaker, it will have repercussions on the logistics, finance, risk and marketing.

Critical path - the series of tasks that need to be completed to make sure the event is on time. If one of these tasks takes longer to complete than what was planned, the result in the event not meeting its deadline The term is also used for the most

important tasks or critical tasks such as permission for authorities. The *crucial* tasks is a better way to describe these tasks.

Deadline - a fixed time for completion. Often used with a degree of latitude in general business. However in event management it has an exact meaning. Sometime to stress this, the term **fixed** deadline is used.

Deliverable - a product or service that is the result (output) of a task or work-package. It can it proof that the task has been completed and passed on to start the next stage or task. The venue design/plan is an example of a deliverable as it is a tangible result of site planning and is used for the set up of the site.

Event Management - the process of planning, organising, leading and controlling the efforts of team members and using all other necessary resources to deliver and shut down an event. This includes the functions of creation, planning, implementation, controlling and evaluating according to the requirements of the event stakeholders.

Event performing organisation - the team who delivers and managers to event. They can be a specialist professional event company, a temporary event committee of volunteers or a team brought together to organise the events from within a large company.

Event product - what is on at the event. For large events this may be treated as a number of products or a product portfolio.

Event Project Life Cycle - a term coined by the author to clarify the difference between the management of a number of events and festivals – such as that performed by a town or region – from the actual process of managing an event. The former is best described as event portfolio management of event program management. Unfortunately the term 'program' has a different meaning in event management to that given it in project management. To confuse the issue further the term *event life cycle* is used in the same sense as a product life cycle. This refers to the life of repeat events such as an annual festival. Perhaps abetter way to describe the event project is to call it the internal management. Therefore the event project life cycle is the phases the management of the project goes through to deliver the event and perform the shutdown of the event.

Feasibility study. The assessment a future event and created in the first stage of event management, the initiation. It describes the business and or social case for the event and the necessary success factors. Often the study will compare alternatives for the event, such as sponsors, or venues and their strengths and weaknesses.

Gantt Chart - a graphic representation of the schedule. It is a list of tasks and uses horizontal bars to show their duration. Often used in marketing campaigns or with volunteers, as it is easily and quickly understood.

Gap Analysis - comparing the event plan with best practice in the event industry so as to identify anything missing from the plan.

GO/NO GO Decision - at certain times in event organising, a definitive choice must be made to continue or to stop. An example of the GO/NO GO decision occurs when the event feasibility study is complete and assessed.

Heinrich's Ratio - ratio of 88 percent of unsafe acts to 10 percent unsafe condition. Related to Heinrich's theory of injury causation that traces back the causal link "injury, accidents, unsafe acts and conditions, faults created by environment".

House seats - seats in a venue set reserved for the use of the venue management.

IFEA - International Festival and Events Association.

Incentive contract - an agreement with an inducement that links the contractor to the success of the event. A 'door deal' for the entertainment is an example. The entertainers are paid according to the number of people they attract.

Intangible - used in the sense of difficult to directly measure.

ISES - International Special Events Society .

Lead time – the amount of time between the decision to take an action and the completion of that action by a third party. For example, the lead time for a promotion in a magazine is the period starting with the PR material being sent to the magazine and finishing when the material goes to print and distribution. Lead times are important for events as they will determines when many of the tasks need to be started. They allow the event performing company to work backwards from the date of the event and create a timeline for the tasks.

Letter of Agreement - is a document that briefly sets out the agreement between two parties.

Look of the Event - designing all the visual aspects of the event so that there is a common theme.

Lump sum (fixed fee) contract - an agreement where the price of the service or product is fixed.

Milestone - the date of completion of a significant action or task such as the day the sponsors join the event or when the venue contract is signed. Milestones are used to plan and communicate important times in the event's management.

PA - Public Address system. The sound system at an event site. May be used for announcements, speeches and music.

Payback period - the time for the benefit of the event to meet all the costs involved in the event. Ticketed events, such as concerts, have the pay back period as zero as the costs are met by sales of tickets before or at the concert. Sales promotions and

exhibitions typically have covered the cost of the promotion by a number of months after the event. These are estimated by sales directly traced to the promotion.

Process maps: a graphical representation of a series of actions or tasks that act on inputs to produce a deliverable. The inputs and deliverables may be products, services or information.

Product life cycle – according to marketing theory it is the phases a repeat event/festival will go through from growth to maturity and final decline. However it is contentious whether it can be used for prediction as some events, such as religious festivals, have lasted thousands of years and others have closed on their opening day.

Project Management - a methodology for organising projects. Developed in project based industries such as civil construction engineering, product development, military and information technology.

Purpose-built venue – a venue that has been designed and construct to accommodate events. The Olympic Stadiums are an example. Another example is the function room of hotels and Exhibition halls. Some venue, although not 'purpose built' have facilities that can accommodate events - such as theatres. A purpose-built venue will often require the hirer to use the venue's suppliers for the event. Catering and audio visual are common examples. Any 'outside' suppliers may have to pay a substantial extra fee to use the venue.

Ratio Analysis - a method of monitoring the progress of the event management by means of indicative ratios - such as income to expenditure .

Relational Database - a collection of facts (data) that are linked to each other such that changing one or more of these facts will automatically change others.

Resource Analysis - the identification of the resources needed for the event and its management. This may be completed via the work breakdown structure. The promotion of an event, for example, will require email listings, printer, a knowledgeable person and office space. Resource analysis is essential for the correct costing of an event.

Resource specification - the description of an event resource. In particular the description of the goods and services supplied to the event by the contractors. These may be specified by Function - how the fit into the whole event; Performance - what it will do at the event; Technical - physical description of the goods or aspects of the service. Good specification is important in events, as there may be no time to change the goods once they have arrived at the site.

Rider - extra clauses to an entertainment contact that concern the hospitality required by the artist and their accompanying personnel. It is often referred to in the

contract and is found on a separate piece of paper or a separate file to the contract file.

Risk Management - the identification, monitoring and controlling of possible problems to the event. Often risk management will uncover event opportunities. This process needs to be documented, updated and communicated as the event management progresses.

Risk register - a central list of the risks with an action plan to address them. It may include a time frame and the person responsible. Due to the dynamic nature of event the register is often updated.

Schedule - a time based list of tasks.

Scope Creep - the gradual growth in the amount of work needed to manage the event. The scope can expand with being noticed by the management until it is too late. Increasing the scope will affect the cost and the time needed to create the event. A large part of managing the lead up to an event is controlling any changes of scope.

Scope of Work - a description of the work needed for the event to be successful. It includes all the work involved in organising the event as well as the work needed at the event itself. It is sometimes represented by a tree like graph where the work is successively categorised into finer detail.

Signage - the creation and management of the various signs at an event - such as directional signs and warning signs.

Site map - a generic term for the floor plan of a venue or the venue map. It is a bird's eye view of where the event will be staged.

Stakeholder - any one person or organisation that has an interest in the event.

Sub contractors - generally the suppliers that are contracted to the event management.

Task - a unit of work needed to create, manage or shutdown the event. When a number of tasks are grouped together they are called a work-package and given to a specialist company to carry them out. The sound for an event may be a number of tasks and are grouped together and sub contracted to a sound supplier company.

Total Quality management - a system of management procedures that are driven by the requirement to increase the quality of the product.

Triple Bottom Line - measuring the impact of an event using economic, social and environmental factors.

TRIZ - Theory for Inventive Problem Solving (Russian Acronym) – TRIZ originated from a study of engineering innovation. It is a comprehensive collection of principles

and inductive laws derived from the features and functions of inventions throughout history(O'Toole et al, 2002).

Turnaround time - the time it takes to make a change in a task and complete that task. As there are many changes over the event project, establishing the turnaround time for most suppliers is important. For example the turnaround time for printing a brochure would be the length of time it takes to print extra copies of the brochure, if they are required.

Uncertainty - can be defined as a lack of certainty and related to the ability to predict. Task uncertainty, which is central to project uncertainty, can be defined as the difference between the amount of information required to perform the task and the amount of information already possessed by the organization (Tatikonda 2000).

Virtual team - an event team that is separated geographically and linked electronically. Common for events that are organised across time zones.

Web enabling - using the web as a essential tool to assist in event management.

Webcast - 'broadcasting' the event over the world wide web.

Work Breakdown Structure (WBS) - all the work needed to create, run and shutdown the event categorised in a hierarchy. The work breakdown structure is used to estimate costs and resources. As well it is used for risk analysis, assigning responsibilities and creating a folder system for the management of the event.

Zero based budgeting – the practice of 'starting with nothing' in regard to event finance. It is creating a budget without any allocated funds. As some special events depend on ticket sales, zero based budgeting is quite common.

Preface

When reviewing the progression of a profession through history, such as medicine, engineering, project management or accounting, there seems a set pathway that is followed. The new methodology arises in response to changing times and assists in changing those times. Initially it is not recognised as a profession or a body of knowledge separate from that which already exists.

It is the contention of this thesis that the time has come for event management to have such recognition.

Since 1996, when the first University courses started in event management in Australia, there are now over 200 courses that have event management as a subject. The recent Event Educators Forum in Sydney NSW in September 2004 , included representatives of nine universities in the attendee list. This phenomenal growth is not restricted to Australia. In the European Union, USA, Middle East and Asia courses and training programs flourish. In 2004 I produced and facilitated event management workshops in Malaysia, United Arab Emirates, Saudi Arabia, USA and South Africa, as well as all major cities in Australia. My post graduate students in Australia come from China, Taiwan, Fiji and Canada. Compared to the single course in 1996 with 30 students, this is an astounding growth. The two textbooks I co-authored are now translated into three languages and have adapted versions in other countries.

At the same time, the growth in the importance of events to a country, region and city has been recognised by governments around the world. The economic impact of events in many countries is measured in billions of dollars.

I began the idea of this thesis in 1999. I created a website to assist in the collection of data and in promoting discussion. On the first page of the website I wrote:

"After 20 years of creating and organising events, I found there is a definite system used in event planning and control. Over the years I compared special events and festivals around the world. Each event manager brings a different experience and style to the organising of these events. However there seems to be an underlying system. Whether the event manager has come from theatre, film, music - or even engineering and medicine - they seem to converge towards a common system. The managers are independently using similar methods, although using different terms

according to their work history. The closest existing 'body of knowledge' which describes this system is Project Management. It doesn't correspond exactly, however the project management process is there, if unrecognised."(www.epms.net)

To gather information and assist discussion I created a 'schema' . The schema, produced below Figure 0.1, enabled me to do this in a structured way:

"Below is a Schema of the Event Project Management System. It is a working model and over the next two years will evolve and be continually compared to actual events and refined accordingly. It forms the basis of my Masters thesis and, eventually, a manual on event organising. Parts of it, in particular the Checklists, have been compiled from the experience of many event coordinators, directors and managers. That is not to say that the checklists are complete - after all each special event is indeed special." (www.epms.net)
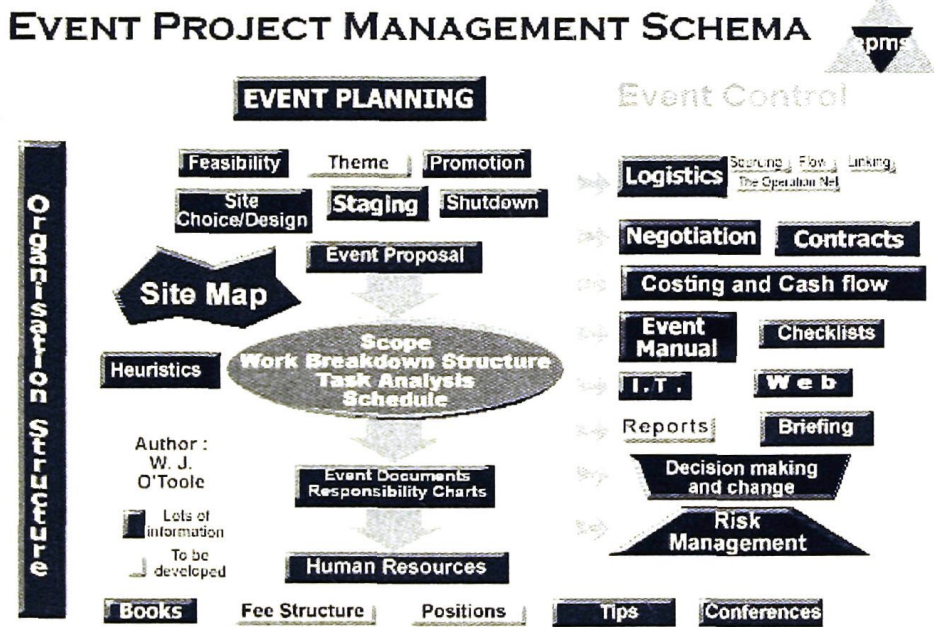
Figure 0.1 Schema from the 1999 website

Unfortunately it was too far ahead of its time and I could not complete the thesis in two years as there was not the information to reference. So I created, wrote and presented at conferences the papers necessary for a reference list.

On the *time line* Figure 0.2, is illustrated the progression of the thesis. The papers presented at event conferences lead to the formation of an International Committee to create an event management body of knowledge (EMBOK). The international authors such as Julia Rutherford Silvers and Dr JJ Goldblatt, were easily convinced of the need for an EMBOK. Their latest event textbooks now include the tools and techniques of project management (*Silvers 2004; Goldblatt 2005*).

I felt that the thesis needed a guideline to progress. Therefore the clearly stated methodology in the PMBOK and associated textbooks was used to compare event management with project management. In this way the thesis had a structure from which to construct a body of work.

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As I pointed out in the third edition of Festival and Special Event Management:

"PMBoK 2000 ™ lists 9 areas of knowledge: scope, cost, time, integration, procurement, quality, human resources, communication and risk. These are the traditional project management areas. However the event management will also be *concerned with marketing and designing the event. In the construction industry, the* project manager would rarely be involved in designing the building, finding the money to build it or making decisions on the building's marketability. These are major concerns of the special event and festival manager. (Allen et al 2005, p. 285)

Timeline of the thesis: event management body of knowledge project

Created Event Project Management
Module for University of Sydney

PMBOK/EMBOK comparison set as
part of online course assignment topic

Write textbook
Corporate Event Project Management
for J Wiley New York - released 2002

Creation of Event Management Body of Knowledge,
International Committee

Formation of Project   **Definition and research**   **Testing**   **Delivery**

1999
Website set up at
University of Sydney
explaining the EMBOK
project

2000 July
Australian Centre for Event
Management conference
(ACEM) paper
on EMOBK
project management

2002
Release of
*Regional Event
Management Handbook*

November 2003
Announce the EMBOK project at
International Festival and Events Association,
Anaheim USA

September 2004
Event Educators Forum

2002
Second edition of *Festival and Special
Event Management* released with
significant event project management content

June 2004 IMBIZO - event management
body of knowledge conference in
Johannesburg, South Africa

Nov 2004
Discussion and progress report
of EMBOK at the International
Festival and Events Association
Boston USA

2002
International Special Events Society
Conference, Sydney
papers on Risk and Capability

Future

EMBOK paper published
in Event Management
Jounal

July 2005
EMBOK IMBIZO 2
Johannesburg

Figure 0.2 Thesis Timeline

The study lead to problems that arise from straddling two disciplines. Any inter-discipline study is fraught with detractors. However I regard this as proof of its efficacy and applicability. Some project managers regard event management as a sub-set of their discipline. After the Sydney Olympics in 2000, this mind-set lead a number of project management companies, such a APP and GHD to form event companies. However it was quickly obvious that the skills and knowledge were not the same.

According to Greek Mythology, the innkeeper Procrustes only had one bed in his inn. When a guest arrived to stay at the inn, Procrustes would fit the guest to the bed. If the guest was too long, he would cut off his legs. If the guest was too short he would stretch him until the guest fitted the bed perfectly. The analogy is with the event management being stretched and chopped so it fits the traditional project management system.

On the other hand, the experienced event managers were disparaging of any increase in bureaucracy and external control they thought accompanied the project management discipline. As Ric Birch, the producer of numerous large scale events, including the opening ceremony of the Sydney Olympics, wrote:

"Since I left Sydney at the end of 2000, the world of special events has grown more than ever. The opportunity to produce ceremonies on behalf of the Olympic or Commonwealth Games, or any of the many other regional sporting events is attracting more and more interest - although the role of a creative producer of ceremonies seems to have been overtaken by consultant project managers, who refer to ceremonies as 'deliverables' that produce marketing and promotions 'outcomes'." (Birch 2004, p.308)

Perhaps the quickest development in events that is changing the attitudes of event managers is the rise of risk management. A number of these influential event risk studies were used in the construction of this thesis. Legal changes concerning director's liability are filtering down to the events sponsored by their companies. Therefore compliance is a new issue for the event manager.

The thesis charts a course between the and Scylla of project management methodology and Charybdis of event management experience. Each discipline is absolutely certain they are right. Just like the six blind men who try to describe an elephant having touched only one a part of its body:

"And so these men of Indostan
Disputed loud and long,
Each in his own opinion
Exceeding stiff and strong,
Though each was partly in the right,
And all were in the wrong!"
(John Godfrey Saxe)

I wish to conclude this preface with the statement of aims of the EMBOK. The full EMBOK paper is included in the thesis. There can be no doubt that the EMBOK project arose out of my work at the Department of Engineering at the University of Sydney. Therefore this thesis is dedicated to those in the Department who willingly accepted my project and had the foresight to realise the marriage of project management theory and event management practice would, as Professor Joe Jeff Goldblatt, the progenitor of the event management discipline, wrote , "revolutionise the field".

EMBOK: statement of intent

The intention of the International EMBOK Project is to create a framework of knowledge and processes that are used in the management of events that may be customized to meet the needs of various cultures, governments, education programs, and organizations.

The EMBOK Is…
· A descriptive summary of the scope of event management
· A framework for future development of the event management profession
· A flexible tool for all industry stakeholders

The EMBOK will provide a framework for the creation and improvement of
· Competency criterion for education and training
· Curriculum development
· Books, software, manuals and job performance aids
· Professional development programs, products and certification systems
· Position descriptions and career development for staff
· Assessment systems for contracting, bidding and tendering
· Research framework to develop the profession

- Knowledge transfer systems
- Legislative and regulation frameworks
- International standards — including ethical and quality issues

The members of the International Committee are :

- Dr. Joe Goldblatt, CSEP — (USA) Professor at Temple University; Founding Director of the George Washington University Event Management Certificate Program
- William J. O'Toole — (AUS) Event Project Management System Pty ltd.; University of Sydney Project Management Program
- Glenn Bowdin — (UK) Principal lecturer at the UK Centre for Events Management at Leeds Metropolitan University
- Julia Rutherford Silvers, CSEP — (USA) Speaking of Events; adjunct faculty at University of Nevada, Las Vegas;
- Kathy Nelson, CSEP, CMP — (USA) Professor at the University of Nevada, Las Vegas
- Janet Landey – (SA) Director Institute of Event Management, Johannesburg South Africa
- Matthew Gonzalez, MCSE, PMP — (USA) G Solutions, Inc. Entertainment – Project Manager of the EMBOK project

Introduction

In his analysis of the event management of a major public event Johnson states "...in the initial phase of the event the only real objective came from the UNTAET [United Nations Transitional Administration in East Timor] stating that there would be an event to celebrate East Timor's independence. What form the celebrations would take, who was to perform, where it would be held, and how much it would cost were not further developed even when the event had been given full approval. Furthermore, the goals of the event seem obvious in some ways but difficult to define in other ways." (Johnson 2002b, p. 2)

Johnson was a member of the event management team for the celebrations to mark the handover of the administration of East Timor to its newly elected government. His candid observations came from an experienced project manager perspective in the centre of an important event with a large number of stakeholders.

In this description, Johnson captures the essence of this thesis, the complexity, uncertainty and intangible nature of the event management environment. In such an environment, many of the tools and techniques that make up the PMBOK and other project management texts are "too cumbersome" to use. The short time frame, unfamiliarity, temporary logistics and the ultimate, unchangeable deadline do not allow the time for these tools to be employed. The deadline, in particular, influences every aspect of event management. The scope is developed as the event is coming into focus. The *definition of the asset*, as illustrated by the Johnson quote, where the event is constantly changing up to the day of the event itself, is almost impossible to make. In my case study of the East Timor Celebrations, I quote from an interview with the Event Director, Ignatius Jones. He describes the problems of deciding what will happen at the celebrations:

"....there's 13 districts in Timor because of the mountainous nature of the country, they're extremely diverse. There's 15 indigenous languages, not counting Tetum Prasa or Tetum Dili which is the lingua franca. Or Portuguese, which everyone over 35 speaks. Or Bahasa, which everyone under 35 speaks. So there's been enormous pressure from the districts that each of them be represented. So to do this it's been very, very difficult to do this in such a way. There's 13 districts and a sub-district; if I

give every one of them 2 minutes, we're up at half an hour. And half an hour out of a 2-hour ceremony is an enormous amount of time when you consider you've also got to pay tribute to the traditional law, the elders of Timor are very, very important there. The youth of Timor, the resistance itself, and then of course the formal hand-over." (O'Toole 2005, p. 2)

The scope of work changes rapidly as marketing and promotion are employed to develop the event.

The thesis begins by investigating whether a model can actually be made of event management and whether project management can be used as the basis of this model. The immaturity of the event industry is compared to the capability maturity model to illustrate the industry's lack of self-recognition. An indicator of this immaturity is the deficiency in a standard terminology to describe the process of event management. Even the term 'event management', as it is currently employed is confusing. The more general characteristics of the event management environment described that mitigate against using the PMBOK model. As illustrated by the quote from Johnson, these include complexity, uncertainty and the intangible nature of the event outcomes.

The next 10 chapters concern the areas of event management and their comparison to the similar areas in PMBOK. They are not in order of time or importance, as event management does not have a linear progression for the use of areas of knowledge. The dynamic system that describes the event management process has all areas of management working at all times. In a similar way to the multi-threading of modern software, each area affects each other area over the course of the project.

I have ordered them according to the degree of difference between the traditional project management and event management. Each area of management - or area of knowledge - has a flow chart attached to it to illustrate the management process. Scope, feasibility and integration are grouped into the first chapter as this reflects the process in event management. Scope is developing over the project life cycle. Therefore feasibility and integration are continuous processes. PMBOK and other standard texts on project management stress that scope definition during the initiation phase is essential for a project to be successful. Event practice and the writings on event management demonstrate that scope is constantly ready to change in response to opportunities and risks during any of the phases.

Perhaps the greatest driver of scope development is the influence of the multiple stakeholders. Unlike the traditional project such as civil engineering, the average

event has numerous stakeholders. As set out in Chapter 3, the larger the number of stakeholders the more complex and uncertain becomes the management environment. In such an environment, event management has developed sophisticated tools of stakeholder management. These include the management of sponsorship and the techniques of marketing.

Chapter 4 is unique to event management and concerns the design of the product – the event. The design includes staging, venue design, and the event program. All of these are created to enhance the uniqueness or 'specialness' of the event. Therefore they are determined by intangible objectives. Most of the event texts are concerned with this aspect of event management. These intangible objectives are an essential part of the over all management objectives and therefore significantly contribute to the uncertainty inherent in event management.

Event marketing, as compared in Chapter 5, can be regarded as a method to reduce this inherent uncertainty in event management. The optimisation of the event variables of product, price, promotion and place, is the essential tool of event marketing. As with the area of knowledge, design, this is not mentioned in PMBOK or any of the standard texts on project management.

The Cost section of project management contains sophisticated tools of cost monitoring and reporting. This is necessary but not sufficient to describe this area of event management. Event management is also concerned with revenue. Hence this area of knowledge is called Finance (Chapter 6). Cost control methods work when the income is stable. However for many events this is not the case. Income is variable and therefore ongoing cash flow management takes on an importance not found in the PMBOK. Revenue sourcing in the form of sponsorship development is, in some cases, a major part of the management of an event.

Time management as set out in Chapter 7, concerns the date of the event and the deadline. The scheduling tools of PMBOK are used extensively in event management. However all aspects of the management of the event work under the cloud of the deadline. Therefore every aspect of change must be assessed according to its possible affect on the deadline.

The risk management process as described in project management texts is one area that is increasingly being employed by event management. When assessed in terms of its applicability in a dynamic complex system, quantitative risk management is secondary to qualitative. Chapter 8 investigates this aspect of event and project management.

Communication management as discussed in Chapter 9, concerns the external communication with the possible attendees as well as internal communication of the

event team. The later is well described by project management. The former, called promotion, is unique to event projects.

The procurement of resources, found in Chapter 10, is similar in all projects. However the contractors will have to accommodate change. The short term logistics and temporary nature of the event preclude the effectiveness of contract penalties. More informal methods are recommended by the event texts such as partnering. The major procurement is sourcing and contracting the venue or event site ,as this will set the constraints on many other areas of the event.

The ten areas of event management conclude with Chapter 11 on human resources. Volunteers and rapid changes in staff numbers over a very short period are the characteristics of events not found in other projects. Both of these contribute to the uncertainty and complexity of event management. The deadline has an affect on human resources. The time taken to use the tools and techniques used in the PMBOK have to be measured against the deadline. The result is that event management employ more informal methods of human resources management than those described in PMBOK.

The model suggested by this thesis is a process model. The figures that are attached to each chapter attempt to show the processes involved in each area of knowledge. The first level process is simply illustrated in Figure 1.1 found in Chapter 1 Overview. This can be broken down into the ten areas of knowledge processes. These become the second level. Each process will be influenced by external trends, as the event project management take place over time and is under the influence of trends affecting the numerous stakeholders. There will be many changes and these need to be assessed according to their affect on the deadline as well as on the numerous intangible and tangible objectives of the stakeholders.

I have chosen a number of project management texts to assist in the interpretation of the PMBOK. However the aim of this thesis is to compare event management with traditional project management, so I have not strayed too far from the PMBOK standard.

To support the model of this thesis, I have use texts from a wider variety of management areas, including system dynamics, complexity, decision optimisation, risk and software development.

The event texts chosen are the main textbooks used in Universities and by event managers around the world. New textbooks are being published at a rapid rate. In the course of preparing this thesis, many of the original textbook have been rewritten

using the findings of my research into the application of project management. Goldblatt (2005), Silvers (2004) and Shone (2004) all refer to the textbooks or papers I have presented. Two revised event textbooks now have chapters on project management.

As I explain in the first chapter of the thesis, the academic event management journal articles have little to say on this topic. Therefore, I have relied on the documents used in the management or assessment of 15 major events. These are listed in Chapter 1. Documents related to event management are difficult to obtain. This is further proof of an immature industry.

As well as these specific events, I have used the results of my post graduate student's work in studying event management as part of their online course in project management. They were required to work on an event occurring at the time of their study. Their insights were invaluable as they tested, first hand, the assertions of this thesis. Over the four years, they described and analysed in detail over 25 events. These included: a large book fair, a heritage festival, the sale of flats as an event, the Grand Prix, various product launches, the City to Surf race, the Hong Kong Oxfam Trail walk and a number of exhibitions.

Chapter 1 Overview of Thesis

"During the recent century beginning with the numerous world fairs and major sporting events and concluding with the ubiquitous millennium festivities, the tourism industry has seen a significant increase in the size, scope, length and visibility of these unique ventures known as hallmark or mega events. However there continues to be little empirical evidence that validates the social, political, ecological , and economic benefits of these projects. Further more, the rapid growth of the event management profession has produced a current climate that is confusing, lacking in credibility as compared to other professions and perhaps detrimental to its future long term health."

Goldbaltt, J 2000) 'A Future for Event management : The Analysis of Major Trends Impacting the Emerging Profession', *Conference Proceedings of the 'Events Beyond 2000:Setting the Agenda'*, ACEM UTS, Sydney.

"Information infrastructure is a tricky thing to analyse. Good, usable systems disappear almost by definition. The easier they are to use, the harder they are to see."

Bowker, G & Star, S 1999, *Sorting Things Out: Classification and its Consequences* , MIT USA, p. 33.

The purpose of this thesis is to establish a framework to enable the creation of an event management body of knowledge. The method is to compare the current practice evidenced in selected available event documents and contemporary literature of event management practice, with the project management body of knowledge. This is executed by comparing the methodology described in the PMBOK (2000) with the equivalent areas of knowledge in the event industry. The processes of event management are expressed by means of schemas or process maps. Therefore, the synthesis of the comparison is a skeleton of processes that can be fleshed out with research of current event management practice. The first task is to decide on a classification of the areas of knowledge. The PMBOK (2000) is used as the starting point.[1]

---

[1] The importance of classification to the development of a body of knowledge and the related profession is found in a number of modern texts Bowker and Star 1999

A major constraint for this thesis is the immaturity of the event industry. This recent discovery of event management as an indefinable body of knowledge or discipline is mentioned by a number of recent texts (Getz 1998; Getz 2000; O'Toole & Mikolaitis 2002; Silvers 2004). Shone (2001, p. 26) emphasises the lack of data and the difficulty of collecting the data:

"In building up a picture of event activity we are, in effect, 'building a wall'. At present all we have for this wall are a few bricks, from widely different sources, and not much by the way of foundations. As the events industry is not typically seen as a homogenous whole, there is no drive to seek common statistical information, either by the industry or by other uses of statistical data, such as governments and academics. In the range of events activity, the nature of personal events, voluntary events and similar activities means that almost no data are collected for many kinds of events, except by occasional sampling, or perhaps by event organizers for their own use or for a few household surveys…..Many events organisations record data mainly for their own internal use, if they record it at all."

When commenting on the Sydney Events Beyond 2000 conference, Donald Getz wrote:

"This conference appears to be the very first anywhere to focus on education, research and evaluation issues faced by the events field" Getz (2000, p. 10)

With the notable exception of some recent texts (Allen et al 2002; O'Toole & Mikolaitis 2002; Silvers 2004) a characteristic of an immature industry is the inability of the industry to recognise its immaturity. The management processes that are obvious in other industries, are implicit and nascent in events, rather than recognised, described and therefore able to be assessed. This lead Getz to observe that festival managers rely on their reputation rather than any external measure, such as benchmarking, to assess event success (Getz 1998).

In particular the lack of standard terminology within the event industry (Arcodia and Robb 2000; Getz 2000; Goldblatt and Nelson 2001; O'Toole & Mikolaitis 2002; Silvers 2004) means that any field research would first need to establish a common language. This was an early identified problem faced by the Sydney Olympics (Allen

illustrate how medical classification formed the attitudes, profession and culture of modern medicine. Hamblyn 2001 describes the importance of classification of the clouds to the development of meteorology.

et al 2002) and required the creation of a dictionary or terms. It is not for the lack of documentation (Catherwood and Van Kirk 1992) as the Olympics is a repeat event with a long history. It illustrates this lack of a common event language when an established event needs to create a dictionary. One outcome of this thesis, a framework for the event management body of knowledge, will provide a starting point for a dictionary of event management terms.

A further example of the immaturity of the event industry is the lack of any provision for the assessment of the event management system or practice (Getz 1998). Most of the event management texts describe tools and processes for the assessment and evaluation of the event itself. The term "event management" is ambiguous in most event literature. In most cases it means event portfolio management rather than the internal management of the event.

Using a textbook standard definition of management as the process of planning, organising, leading and controlling the efforts of organisation members and of using all other organisational resources to achieve specific organisational goals (Stoner et al 1994), many of the event texts and articles are misnamed. The only academic journal in this field, titled "Event Management" has no articles on the management processes or systems. Of the 103 articles in the journal Festival Management and Event Tourism, one concerned the management system or management processes, albeit indirectly. In the last four issues, a majority of the articles concern the impact of events. These may be classified as strategic issues of events portfolio management or business program management. The identification of event management is often called operations management (McDonald et al 1999) or event project management (O'Toole & Mikolaitis 2002). The evaluation of the operations is often mistaken for the evaluation of the management system and its practice. It is therefore not surprising that the underlying management systems and processes found in project management remain hidden in the event field. Arcodia and Robb (2000) article titled "A Future for Event Management; A taxonomy of event management terms" makes the statement:

"this paper provides an analysis of current terminology used in festivals and events discourse…" (p. 154). However this 'current terminology' does not include any terms that are related to the management system or process of an event or festival. The article is refers to the classification of types of events and festival. This pertains to portfolio management of events and festivals.

The recent publication from the Australian Centre for Event Management, *Event Management; An Australian Bibliography* (Allen, J Harris R and Huyskens M, 2000)

has no list of management system or processes. The majority of items on the list concern event tourism and the impact of events. The Stoner definition of management has no application to this management bibliography.

A further example of the confusion in the use of the term event management is provided by the Festival DIY Kit - Arts Victoria 2002. The economic impact of an event is evaluated without any link to the management of the event. With the exception of Goldblatt and Supovitz (1999); O'Toole and Mikolaitis (2002) and A Sporting Chance (1999), there is little information on event management auditing, risk arising from management decisions or event management systems. It is this lack of any assessment of the internal event management, except indirectly by the evaluation of its product, that concerns this thesis. It is one of the many reasons for the emphasis placed on the risk management as applied to events in this thesis.

In the most recent published survey of the event industry, Helde, Jago, & Dreery (2002) point out the lack of research in the event industry. They describe three areas of research: Event Evaluation, Event Marketing, Event Management and Operations. However, the areas they survey for their paper do not include any mention of research into event management processes or a framework for management of the event as distinct from the actual event. This is a further example of the ambiguity of the term "event management". Their survey is quite clear as to the lack of information on the event industry, with the notable exception of the economic impact of events.

The value of the management system is illustrated by the sale of the manuals and systems used by the Sydney Olympics to the Athens Olympic Committee. In particular: "The lessons learnt by Sydney have been documented in the Transfer of Knowledge Program (TOK), which the IOC purchased from SOCOG. The TOK includes manuals and reports prepared by most of the departments within SOCOG." (Chappelet 2000, p. 3)

The overall lack of recorded data, research and analysis of events means that the methodology of this thesis is similar to the Exploratory study. The current state of the event industry fits with the characteristics requiring exploratory study as defined by Cooper and Schindler (1998, p. 134):

"The area of investigation may be so new or so vague that a researcher needs to do an exploration just to learn something about the dilemma facing the manager. Important variables may not be known or thoroughly defined."

Of the nine approaches to qualitative research listed by Cooper and Schindler, only two are available to an immature industry. These are the use of case studies and document analysis.

Event documents are not generally publicly available. However a number of public events have published reports. The event documents that are used to support this thesis originate from these events:

- Centenary Of Federation Celebrations in Sydney 2001
- East Timor handover ceremony and Independence Day celebrations 2000
- New Horizons Australia India country promotion in India 1996
- V8 Car Race in Canberra 2001
- Yass River Festival 2001
- Victor Harbour Folk Festival
- The Sydney Olympics 2000
- ICC World Cup Cricket 2003 (South Africa)
- Asia Pacific Scouting Jamboree 2001
- Big Day Out Sydney concert 2001
- AMP Journey of a Nation 2001
- *newImages* British country promotion 1997
- Sydney to Hobart yacht race 1998
- Ulladulla Summer Games 1999
- Canberra Hospital Implosion 1997

A model, processes, system or a Body of Knowledge?

This thesis presents a model of event management. It is a management model made up of management processes. The high level process called 'event management' is illustrated in Figure 1.1.

Event Management :
high level process
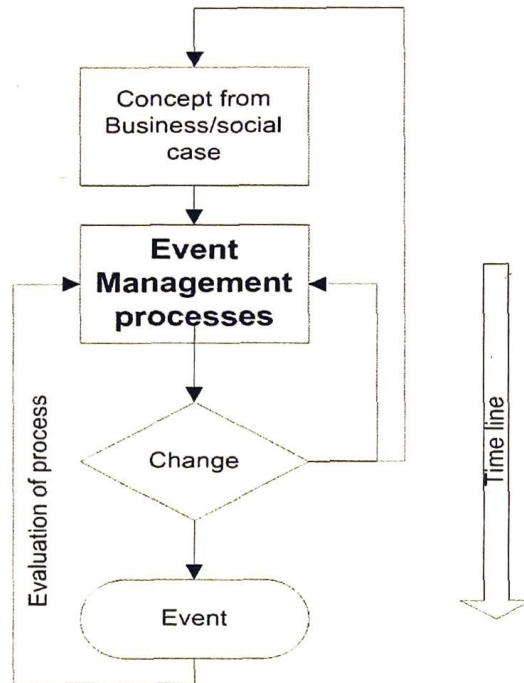
W. J. O'Toole 2004

Figure 1.1 Event Management Process

The objective of a management model is to support management to reach its objectives. It is both a descriptive or explanatory and prescriptive model (Casti 1997). It describes and explains the entities and relationships found in all events regardless of size or type and is invariant (Beer 1985). It is prescriptive in the sense that it shows management the efficient and effective processes that are currently hidden. This optimisation of management decisions is expected by event stakeholders. As set out by Williams (2002, p. 34):

" A Model represents or describes perceptions of a real system, simplified, using formal, theoretically based language of concepts and their relationships (that enables the manipulation of these entities) in order to facilitate management, control, or understanding of that system."

Mapping the features of good model to the corresponding characteristics of this thesis produces the table 1.1.

Table 1.1 Model Quality

Features that measure the quality of the Model (Williams 2002)	Characteristics of this thesis
Empirically based	Primary source event documents and recent texts of best practice.
Theoretically sound	Based on PMBOK
Coherent	A series of interlinked processes
Simplified for the purpose	Process diagrams, process mapping
Addresses the complexity	The substance of the thesis
Adds value	Allows development and improvement in the management system
Impacts decisions	Makes overt the processes to assist in decision optimisation and improves future decision by gathering data in a structured manner.

Using the structure of PMBOK as the form for describing areas of knowledge, each chapter of this thesis displays a process schema. The schema are not flowcharts in the engineering sense, but tend towards concept diagrams, cognitive maps or process maps (Williams 2002). They capture the major processes and are related to the data flow diagrams of structured analysis (Demarco 1978). In a similar way to Checkland's activity models, (Checkland and Scholes 1999) they lay the basis for information flow diagrams and a dynamic system model of event management (Sterman 2000). It is important to establish at the beginning, that event management can be described as a purposeful activity rather than an independent high definition feedback system - as described by the hard systems methodology. A soft systems methodology (SSM) can be used to describe such a system. Furthermore, such a model can be used as an intervention tool to assist the event management process. Therefore, it is a prescriptive model. The graphical display of the processes is essential in this intervention as it enables the process to be broken down into individual elements illustrating the logical relationships between the elements over time. Such a description enables better understanding and the possibility of improvement.

The high level process is illustrated in Figure 1.1. It is a simple representation of event management as a process working from the business or social case for an

event to the delivery of the event and the fulfillment of the event objectives. However there are two aspects not usually found in such a diagram. The process is subject to absolute time constraints. The process has a fundamental element of change.

Complexity and Uncertainty

The closest current project management model for events comes from two streams
1.   Project Complexity
2.   Uncertainty and Product Innovation

Using Wideman's Comparative Glossary of Project Management terms v3.1 (n.d.) Project Complexity can be defined as:

"The extent to which a project, or one of its components, involves a large number of parts, and/or a large number of people, to be coordinated and/or interfaced. In project management, project complexity is typically a reflection of the number of work packages involved and the number of different people required to carry them out."

This practical and working definition can be compared with other authors who define complexity in terms of the number of relationships between tasks, rather than the number of tasks.

"we define project complexity as the nature, quantity and magnitude of organisational subtasks and subtask interactions posed by the project" (Tatikonda & Rosenthal 2000, p. 75)

Both definitions suffer from the need to know when the task analysis needs to stop. That is, the granularity of the tasks or the level of the Work Breakdown Structure. This implies that the complexity of a project is related to unfamiliarity of the management with the type of project. Given that novelty and innovation are part of the product, therefore, ipso facto, events are complex.

Using Williams' division into Structure Complexity and Product Complexity, the product of event management - the event itself - is complex. In particular, it is a result of the intangible nature of event outcomes and the multi-objectives of the event, introduced by the numerous stakeholders. It is reflected back and contributes to the structure complexity of the event management. Williams measures structural complexity by the number of reciprocal dependencies and the number of stakeholders.

Summarising Williams, the characteristics of Project Complexity are:
    1.   Number of stakeholders

2. Number of reciprocal dependencies
3. Multi objectives
4. Number of changes or modifications to both the product and the project.
5. Uncertainty of goals
6. Uncertainty of methods

Each one of these characteristics is mentioned by the texts on event management as part of the standard event management environment (O'Toole 2003; Silvers 2004). A summary of the factors that contribute to the complexity of the process of event management and the strategies recommended by the event texts are shown in Figure 1.2.

Process Complexity

Contributing factors

Strategies for containment

Diversity of industry :
exhibitions,
conventions, festivals

Immaturity of Industry :
Lack of terminology
no communication
standards

Volunteers ; leading to
rework and unrecognized
task relationships

Pulsating
organization

Uncertainty in
product

Complexity of
process

Containment of
complexity through
teams

Work packages and
delegation to teams
and suppliers

Event coordination
rather than control

Stakeholder grouping
such as levels of
sponsorship

W. J. O'Toole 2004

Figure 1.2 Process Complexity

The writings on product innovation address similar problems faced by events when trying to capture the product and process. In particular novelty corresponds to the Wow factor in events (Harris & Allen 2002) or innovation in event design (Malouf 1999). It is an essential component that differentiates each event and becomes the Unique Selling Point (UPI) for the marketing of the event (Harris & Allen 2002). It is a result of a creative process, such as brainstorming and storyboarding (O'Toole & Mikolaitis 2002; Allen et al 2002). The complexity of the product i.e. the event itself, is

often an attraction for the attendees. Figure 1.3 illustrates some of the aspects of the event management environment that contribute to this complexity.

Product Complexity

Contributing factors
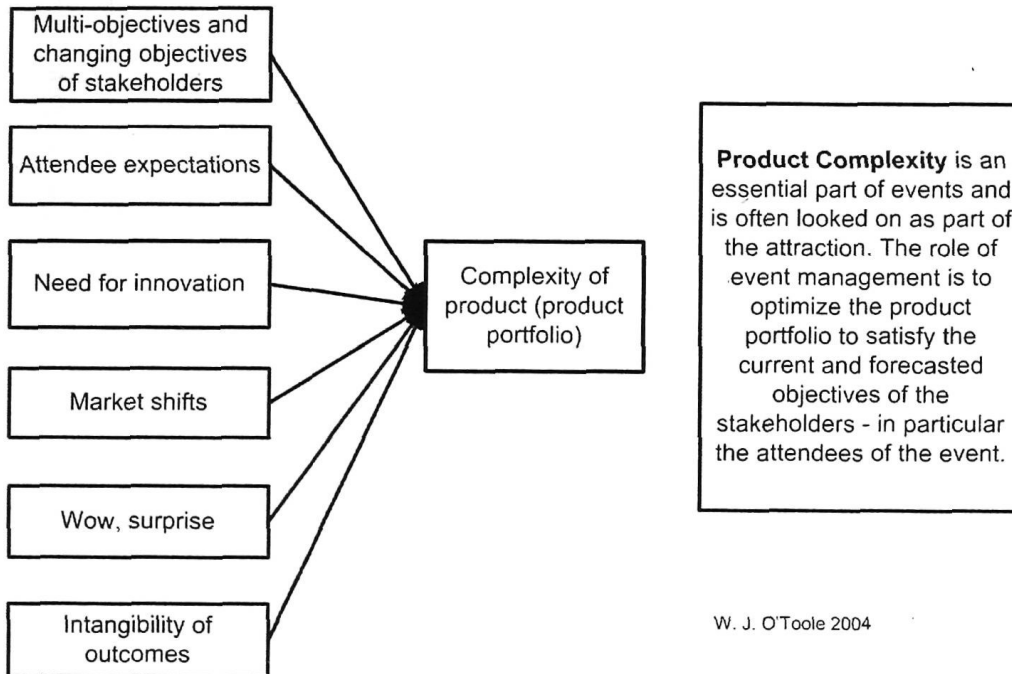
Figure 1.3. Product Complexity

Combining Williams' project complexity characterised by 'multi-objectives' with Checkland's necessity of ambiguity in ill-defined objectives, produces a general description of the event environment as uncertain. In such an uncertain environment, management flexibility is required. Shone uses the two dimensions of complexity and uncertainty, to provide a classification framework for events.

Their taxonomy of events divides them into:

- Individual
- Group
- Organisational
- Multi organisational
- National
- International (Shone 2001)

Figure 1.4 is a map of types of events according to their complexity and uncertainty. The events that have low uncertainty are the ones that seem to be able to use traditional project management tools and techniques.

Typology of Events used in the thesis
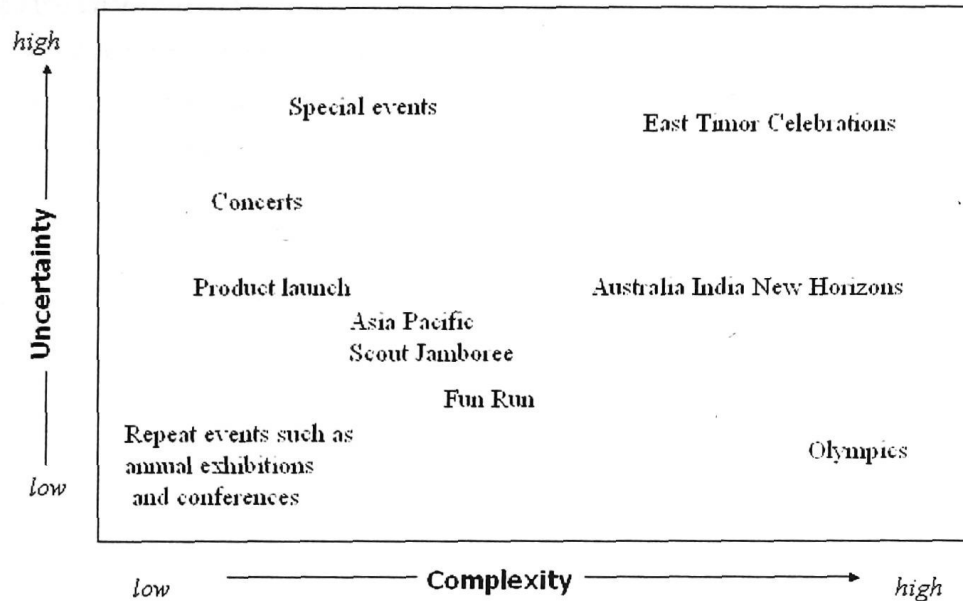
Figure 1.4. Mapping of events according to complexity and uncertainty (after Shone 2001)

Special events - that is, one-off or unique events – are highly uncertain in many areas of management, such as finance, marketability and sponsorship commitment. The financial risk involved in this uncertainly is also their attraction for entrepreneurs and promoters (O'Toole 2003) as the risk gives a higher return and keeps out competitors. Annual events that have little or changes in suppliers, finance, stakeholders or venue have low uncertainty and low complexity.

The East Timor handover celebrations involved multi-agencies from many countries, a short time frame, intangible outcomes and a unique program (Johnson 2000). Such an event has many area of uncertainty and is highly complex.

Although it is outside the scope of this thesis, the map (figure 1.4) corresponds to the applicability of current project management software to an event or festival.. Events with low uncertainty and low complexity, such as conferences and exhibitions, have many commercial software packages to manage the event available to them. Events with low uncertainty and high complexity, such as the Olympics (Timmins 2000) and International Grand Prix use event or project management software. However the applicability of event or project management software diminishes rapidly with the events in the upper region of the graph (O'Toole 2003).

The complexity and uncertainty found in event management can be characterised by the model suggested by Sterman (2000, p. 22) as a dynamic system. Such a system has the characteristics of:

- Dynamic – change on many levels
- Tightly coupled – changes in one area of the management will quickly affect other areas
- Governed by Feedback – any action will have a result that will influence other similar actions
- Nonlinear – effect and cause are rarely proportional
- History dependent – actions are mostly irreversible
- Self organising – semi autonomous groups or teams
- Adaptive – can quickly respond to changes to minimise their negative impact
- Counterintuitive – difficult to exactly predict
- Policy resistive – difficult to comprehend and therefore control using linear methods
- Characterised by trade-offs – the effects of a decision in one area of event management will be traded against the results in other areas.

The model for event management can therefore be described as a dynamic system made up of interlocking processes. The applicability of traditional project management of this system is characterised by its degree of uncertainty and complexity. These processes are found as flow charts in each chapter of this thesis.

Phases of event management and the event life cycle.

PMBOK (2000) recognises the different models for the project life cycle according to the industry to which it is applied. Although the four examples cited in this reference do not provide a model for event management, aspects of each are found in the model for event phases. The phases described in O'Toole & Mikolaitis (2002) are:

1. Idea - concept development
2. Feasibility
3. Planning
4. Implementation
5. Setup
6. Event
7. Shutdown

Watt (1998) describes the life cycle as one process made up of: objectives leading to feasibility; method and timeline finance/approvals; public launch; operating structure

and key personnel; control system; pre-event preparation; publicise event; double check; carryout event; review/evaluate and final report.

As there is no handover of a tangible asset and the intangible asset is a result of the event experience, the event itself is seen as a separate phase. O'Toole (2002) and Allen (2002) point out the different management environment during the event itself. In some events, a new management configuration is created, with a stage or production manager having complete control once the event starts. The new staff will include production staff, volunteers in large numbers, operations or logistics staff and subcontractors. The OHS issues are different on an event site.
The Sydney Olympics prepared for this by restructuring their management from function or department based to venue based (Allen et al 2002).

Intangibility of outcomes

The inability to simply measure the event outcomes is a major limitation to a strict engineering approach to event management. In particular, events for celebrations have highly intangible objectives, as quoted by Cameron:
"The festival is an extension onto the present of the world-creating mythological events… the whole purpose of entering a sanctuary or participating in a festival is that one should be overtaken by that state in India known as 'the other mind', where one is 'beside oneself', spellbound, set apart from one's logic of self-possession. We enter the play sphere in the festival, acquiescing in the game of belief, where fun, joy and rapture rule and the laws in time and space dissolve" Joseph Campbell in Cameron (1995, p. 139)
Further, Cameron makes the plea:
" We need festivals which nourish our spirits, which lead us to a shared sense of joy and understanding, where the creative arts can express our feelings" (ibid, p. 148)
Getz (1997, p. 163) makes the observation;
"This (style) is the core of festivals, and it is the spirit that the organizers want to instil in all types of special events. Drawing from our earlier discussion of the cultural meanings of festivals, it can be stated that the essence of celebration, commemoration, and carnival is the public sharing of themes having common cultural significance to participants. Belonging and contributing to the cause is also an important motivator for the volunteers and organizers. Once their atmosphere or mood is established, merry making can become infectious."

For these types of events. artistic expression and creativity are regarded as essential (Getz 1997; Allen et al 2002; Harris & Allen 2002). Getz (1997) extends this to repeat events and the product life cycle of the event, whereby the product life cycle strategy for success is constant innovation in the program elements. Innovation and creativity are related to the creation of the 'Wow' factor (Harris & Allen 2002). The serendipity, or surprise element of an event is identified by the recent study of UK Folk Festivals (AFO 2003) as a key driver for festival attendance.

Intangible outcomes are common across all types of events. The ACT Auditor General's report (2002, p.22) on the V8 car races in Canberra makes the observation that benefits of publicity value and civic pride claimed by the proponents of the V8 races is "necessarily speculative and involves assumptions that are difficult to verify objectively".

The lack of a direct measure of event outcomes and therefore the inability to set realistic measurable objectives lead Goldblatt (n.d.) to propose the term Return on Event (ROE). He links the ability to measure return on event with the ability to forecast. The ROE is made up of:

- Measure financial return through advertising impression and through capita spending. The later is related to the multipliers used to assess economic impact.
- Measure of PR through various metrics used in public relations
- Measure word of mouth advertising using focus groups
- Measure success of meeting attendee's expectation though comparative survey

The ROE is a parametric method rather than a direct method of indicating event outcomes.

O'Toole & Mikolaitis (2002, p. 255) in their cost benefit survey results, list the metrics as suggested by practicing event managers. These range from lack of public complaints for community events to product awareness. The authors note the importance of measurable results in decision optimisation, using an overseas trade exhibition as an example.

"Once the parameters that contribute to the cost-benefit of the event have been identified, then a look at the boundaries will provide an estimate of the cost benefit effect of a small change in one of the parameters. If more work (cost) is put into

attracting higher-level contacts in the host community, will this additional work (cost) significantly contribute to the benefits, and if so, by how much?"

The search for measurable event objectives is found in most of the event literature. However, there is a warning that the measurable objective, due to its ability to be communicated simply, may obscure the far more important intangible goals (Shone 2001; O'Toole & Mikolaitis 2002; Allen et al 2002).

Conclusion

The event industry has the characteristics of an immature industry. The deficiency in data, research and lack of the recognition of common management processes are major constraints to forming an event management body of knowledge. Hence this thesis is assembling an exploratory model. Of the various management models available to apply to event management, the dynamic system seems the most appropriate. Each area of event management is tightly linked to all other areas as the event needs to take place at a fixed date and place. The two dimensions suggested by Shone (2001) of complexity and uncertainty are a limitation to the direct application of the PMBOK(2000) model. In particular, the intangibility of outcomes reflects on all aspects of the event management processes. Therefore the PMBOK (2000) needs to be significantly transformed for it to realistically model the event management processes.. The following chapters correspond to the areas of knowledge of event management. Taken together they represent an exploratory model of the processes of dynamic system.

Each chapter of this theses has a process schema as the central figure. The subject area is compared to the equivalent area in the PMBOK 2000 and the current standard project management textbooks. The event management process is mapped by comparing and summarising the event texts and using the event documentation listed in the bibliography as a way to validate the texts. This is necessary, as there is so little written describing the actual processes that makes up event management. Figure 1.1 can be seen as a high level process. The figures in each chapter are the sub processes that combine to form this high level process.

Chapter 2 Scope/Integration/feasibility

The PMBOK devotes two chapters to this section of project management. Integration management is subdivided into project plan development, execution of these plans and integrated change control. Scope management is subdivided into initiation, planning, definition, verification and change control.

Scope, Integration and Feasibility are closely linked in the event management texts. The terms are rarely used by any of the event literature and the processes are not directly described. For this reason this chapter relies heavily on the work done by the author and Silvers (2004). In a dynamic system subject to change, the scope is not static. It is developing over the phases of the project. Therefore scope is continually being redefined. As a result the event plans are not fixed. They are subject to development. The integration of the plans is also evolving with the movement in the scope. The feasibility of the event is, therefore, under constant reassessment and analysis. Figure 2.1 illustrates the process of scope management.

Scope Management Process

Stakeholder requirements and expectations

Trend Analysis

Scope definition

Feasibility ← Event impact Assessment

Work Breakdown Structure

Time line

Task Analysis   Integration plan

Change ← Deadline algorithm

Evaluation of scope   Event

LEGEND
| Documented outcomes |
| Categories |
| Inputs |
| Sub processes |

W.J. O'Toole 2004
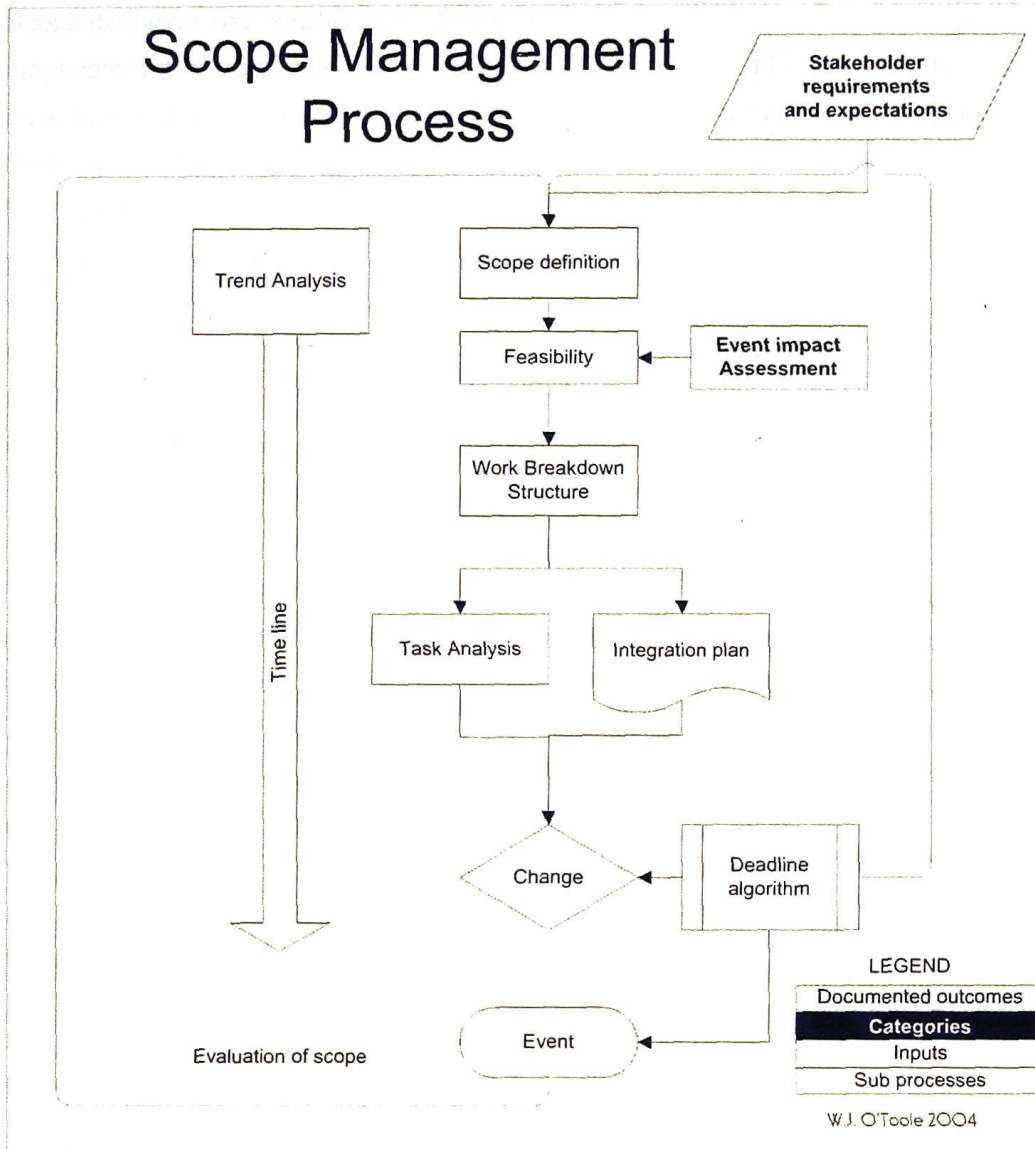
Figure 2.1 Scope management process

Event Feasibility

The first phase in event planning is to establish the objectives of the event. Mission and vision statements are created in consultation with the key stakeholders (Allen et al 2002). From these arise the measurable objectives. Put more informally this enables the what, where, why and who of the event to be established (Watt 1998). The measurable objectives are able to guide the event management through the event project phases and enable the event to communicate success to its stakeholders (O'Toole 2003). Such a process is not found in PMBOK as the project management company is rarely in charge of this more strategic approach to the product.

Scope definition and feasibility are closely related in the event industry. Shone (2001) emphasises the importance of the feasibility study for events as there is limited expertise, a short time frame and a reliance on community support and volunteers. He suggests that the event proposal be passed through three filters. These concern the proposal's Marketability, Operability and Financial viability. Getz (1997) lists profitability or affordability, desirability and suitability. He looks at events form their fit with the destination. O'Toole & Mikolaitis (2002) describes feasibility from the technical point of view as the creation of comparative event configuration options or models. The tools of SWOT analysis, Gap analysis and Cost-benefit analysis are used to support the decision making process on the return on investment (ROI) of the event. Contained within the feasibility, bidding and proposal preparation is the assessment of the event management's ability to deliver the event. However this is the only mention of the assessment of the feasibility of the performing organisation to undertake the event management in the event literature (O'Toole 2002a; Silvers 2004).

There is a similarity in scope development, feasibility and integration between event management and research projects. As Ernø-Kjølhede (2000, p. 5) points out, when comparing traditional project management with research projects:

"the need for predicability of project output… versus the unpredictability of research outcome and new research opportunities arising in the course of the project".

The research project, therefore, is characterised by an evolving scope and continuous feasibility and integration management.

Measuring the Product

A major limitation in feasibility and scope definition is the ability to define the asset (or product). For a corporate event, such as a conference, exhibition or product launch, O'Toole & Mikolaitis (2002, p. 255) lists the ultimate benefits of an event as:

- Promotional Value
- Media Coverage
- Awareness
- Increase in sales
- Lead generation
- Boost staff morale
- Create a presence in the market place
- Build client relationships

All of these benefits are difficult to measure directly, and do not provide a certainty in the guidelines on which to base the scope definition and the integration of plans. The

ultimate benefits of the event become part of the cost benefit analysis and the return on investment (O'Toole & Mikolaitis 2002; Silvers 2004). This is variously referred to as ROE - Return on Event (Goldblatt 2000) or ROEE -Return on Event Entertainment (Sonder 2004).

The difficulty in finding commensurate variables on which to base a feasibility study is illustrated by the Auditor General's Office (2002) report on the V8 Car races in Canberra, quoted in chapter 1 of this thesis. It is directly related to the intangible outcomes of the event.

Understanding and continually clarifying the requirements of the client is paramount to understanding the product and its effects (Malouf 1999; Allen et al 2002). As many of these requirements may be intangible. This is a major difference with the requirement analysis described in PMBOK and the reality of event management.

Project Asset Impact

PMBOK does not discuss the impact of the deliverable. It is a important part of event management. A realistic assessment of the impact of an event is required for a comprehensive feasibility study. Most of the current major event texts devote a large part to the impact of the event. Allen et al (2005 pp. 30 – 46) divide the event impact into:

- Social and Cultural
- Physical and environmental
- Political
- Tourism and Economic.

Allen states that the task of the event management is to identify and predict these impacts.

The accurate assessment of the economic impact of an event is regarded as important for sourcing event finance (Allen et al 2005). The analysis of costs and benefits of an event is complicated by the intangible benefits and the indirect flow-on from event spending. Various models are used to estimate this including Equilibrium Models using Input output tables and multipliers (AFO 2003; Allen et al 2005). However these cannot cover the intangible benefits such as publicity, civic pride and cultural enhancement. The concept of the "triple bottom line" (Fredline 2002), whereby other factors are introduced into the measure of an event's impact, is one possible solution. These factors include responsibility and environmental sustainability, as well as direct economic impact.

It is outside the scope of this thesis to assess the literature on economic impact of events. However this is the one area that has received attention in the event literature. The economic impact of an event such as a major festival will be the deciding factor for its approval by the host organisation, such as State Government. This strategic decision will filter down and affect all the decisions made about the event itself and therefore have to be taken into account by the event management.

Network of Plans

Allen et al (2002) and Getz (1997) describe in detail the numerous plans required by an event. Perhaps this is because their case studies are major festivals and other tourism events. A summary of these plans is shown in Figure 2.2. The plans are networked, as they need to be adapted when there are external changes or developments within the event project. Some of the standard project plans are found within the operation/logistics plans. The limitation of this is that many of the increasingly important plans are left out. In particular, there is no risk management plan.
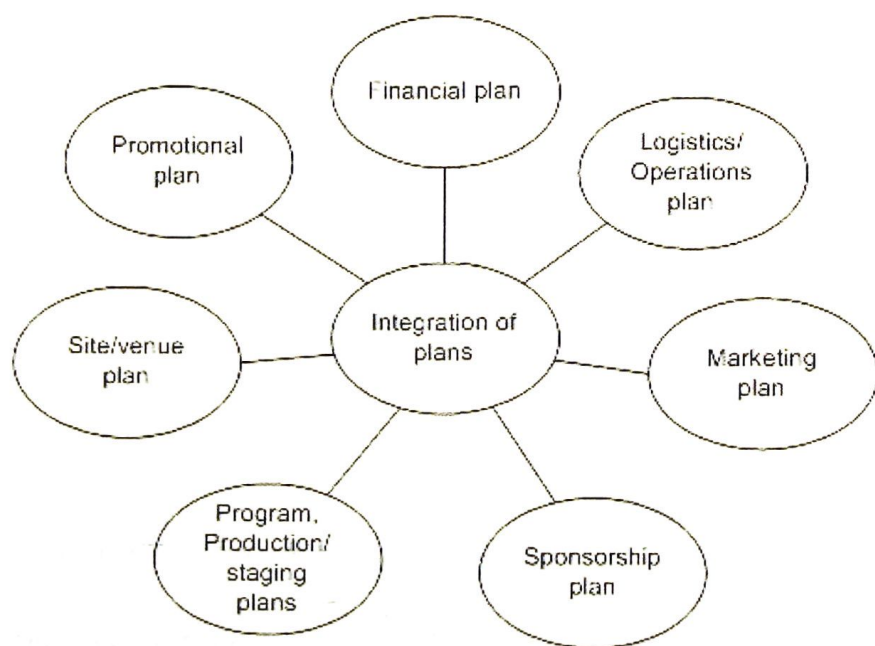
Figure 2.2 Network of event plans - adapted from Allen et al (2002) and Getz (1997)

Figure 2.2 can be compared Figure 2.3 to the sophisticated system of plans prepared by a project manager and used by promotional event for Sydney Water.
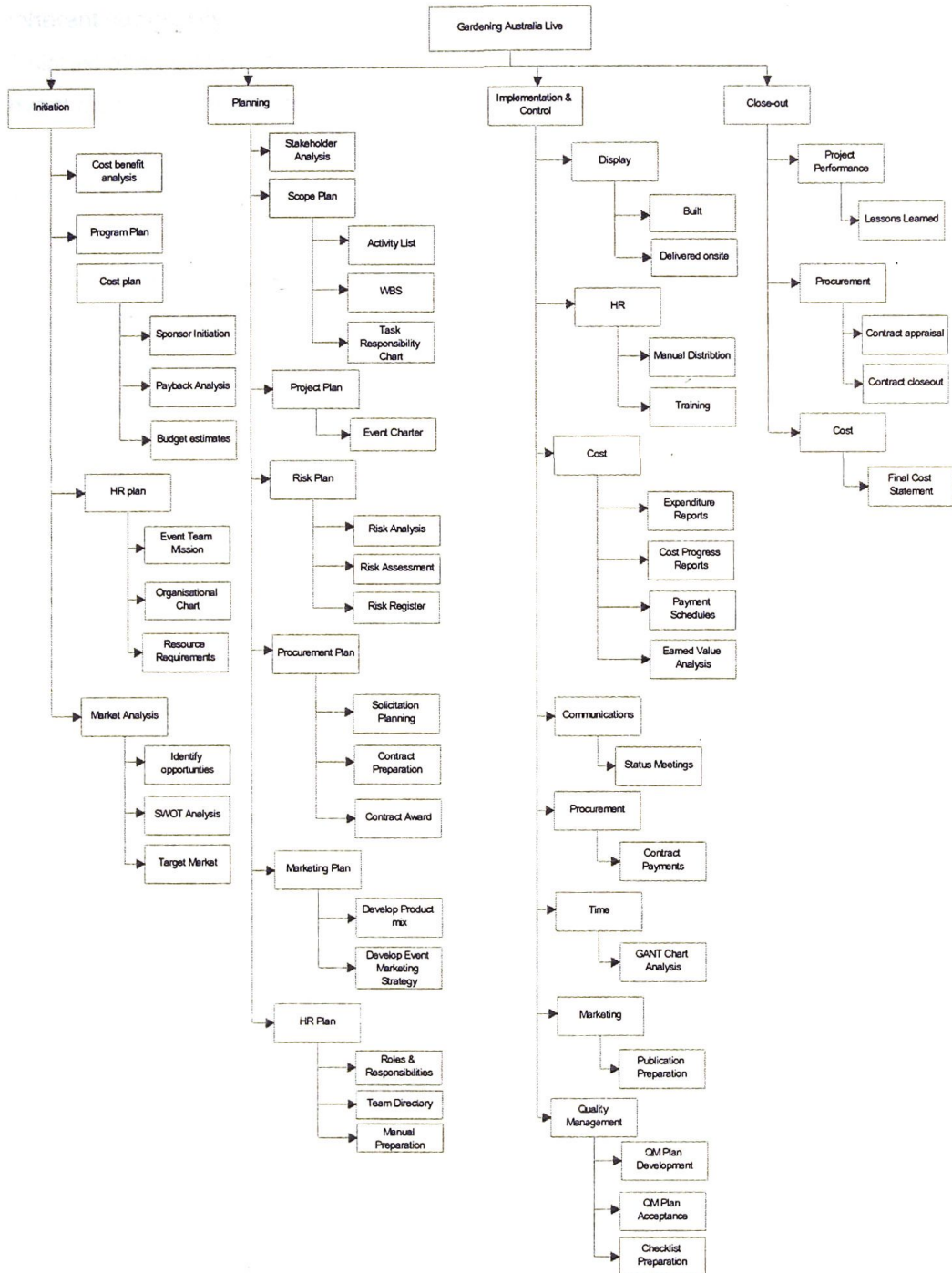
Figure 2.3 Work breakdown structure from Pabst (2004)

Each of the plans in Figure 2.2. represent the event subcommittees i.e. the functional division of an event organising committee (Tonge 2000). Therefore project integration is a high-level organisation issue for many events. It is reflected in the structure of the event organisation, as the integration of the various plans is a fundamental objective

of the event committee. Getz (1997, p.136) regards this as a strategy to control the inherent complexity:

" Almost all events will establish a committee system, given that the complexity of event management and production requires multiple talents and division of labor"

The committee system, as well as integrating the plans, has the advantage of scalability. The committee can be resized according to the growth of the event and the changes in the plans (Tonge 2000; Allen et al 2002; Harris & Allen 2002,). Changes in the committee system can accommodate the development of the scope as the project passes through its phases. Hence the committee system is the most common form or event organisation structure for large events.

The short time frame, scope development, the fact of the deadline and the highly coupled system results in every aspect of the event project being part of project integration. According to Allen et al (2002) and confirmed by Bowdin et al (2001) and O'Toole (2003), the event company takes on the role of coordination as the event deadline nears. In this role, the event team's work concerns the integration of the plans of subcontractors. During the co-ordination phase, the event company will *manage by exception* (O'Toole 2003). This is similar to the Mintzberg (1994) model of an Adhocracy organisation, whereby the work is primarily coordination of the experts in a highly dynamic setting. The suppliers can be partners with the event company. This is a technique of scope control through partnering - i.e. a two-way communication with mutual agreement on event/contractor requirements and benefits. Partnering implies sharing the risks and opportunities afforded by the event.

Performance Measurement

The PMBOK chapter on Scope (Chapter five) makes the statement
Constituent components should be described in terms of tangible, verifiable results to facilitate performance measurement."
The term "performance measurement" is used throughout the project management texts. However, as discussed in the various chapters of this thesis, specific quantifiable performance measures of events and festivals is difficult when so much of the event concerns intangible outcomes. The more general characteristics of a dynamic system with a deadline, mitigate against the use of quantifiable performance measures. Specific aspects of event management, such as use of volunteers, lack of a initial measurable business criteria, changing scope and numerous stakeholders contribute to the lack of efficacy of quantifiable performance measurement.

Work Breakdown Structure

The Work breakdown Structure is a term only used by five of the event textbooks; Allen 1999, McCabe et al 2000, O'Toole & Mikolaitis 2002, Harris & Allen 2002 and Silvers 2004. Thee of these texts are co-authored by the author of this thesis. The other event literature has no systematic way to scope the events. The budget is regarded as the formal plan and control device for the event scope (Malouf 1999; Goldblatt 2002). Most of the event texts take a bottom up approach to the scope. The budget is the major reporting tool to the client. However only using the budget as the planning tool will miss other critical tasks. In particular the tasks that are low cost but high risk such as those on the critical path. The existence of a deadline means that there must be a priority of tasks; the low cost task may be seen as low priority. The danger of this is illustrated when considering compliance issues, such as licensing. These are low cost task with a high risk if not completed (O'Toole 2003). In the part of the event industry that has a single client, the primary financial responsibility of the event manager is to control the costs (Malouf 1999). Historically the clients would also be responsibly for all liability issues such as insurance. However new laws and regulations, such as the Australian Commonwealth Criminal Code, the finding of the Jessica Malik Inquest (Milledge 2002) and the findings of the inquest into the deaths at the Sydney to Hobart Yacht race 1998 (State Coroner 2000) pass the risk responsibility onto the event company (Business Excellence Australia 2003).

The work breakdown structure becomes an essential tool in modern event management. It is used to generate the deliverables of the event project (O'Toole 2000; Silvers 2004). Its ability to be scaled up or down, to be changed easily and its mirroring the files structure used in current event management, means that it is the major tool in project integration (O'Toole & Mikolaitis 2002).

The work breakdown structure for large public events corresponds to its committee system. Schmader (1997) describes the management system of the Boise River Festival as a Festival Production Committee that oversees the work of the subcommittee. This high level committee is integrates the work of the sub-committees. The sub-committees correspond to a festival WBS and include: marketing, risk management, security, merchandise, inventory and entertainment.

Summary

In a dynamic setting, the scope, feasibility and integration are closely linked. Scope definition and feasibility are limited by the inability to describe the asset of the project

with a degree of certainty. Integration, rather than being a separate function of event management is found in every area of event management.

A closely coupled system with a short timeframe means each area of the work breakdown structure is integrated with the other areas. Integration is a sub function of all other areas of event management. The work breakdown structure is the major tool of integration for event management.

Chapter 3 Stakeholder Management

PMBOK recognises the management of stakeholders as being essential to the success of the project. When compared to the other areas of knowledge, it devotes only a small section to stakeholders (PMBOK 2000, Section 2.2). It is within the Stakeholder Management section that resides a small discussion of the management of change. In dealing with change PMBOK (2000, p. 18) recommends:

"In general, differences between or among stakeholders should be resolved in favour of the customer."

In the event industry, as will be discussed in this chapter, this is a difficult solution. In most cases, the customer for events is a complex entity. The event, such as a festival or a conference is a portfolio of products, made up of the numerous sponsors as well as the audience and the client. Each customer may have different objectives, which may change over the course of the management of the event and conflict with other customers. Chapter 5 on Marketing describes this in more detail.

According to Smith (2000), the traditional project management position may be characterised by establishing clear needs at the initiation phase of the project:

"A project is more likely to be successful if it begins well. A good beginning includes time at the outset to discuss project stakeholders' key needs and expectations. This should be augmented with a documented plan to meet these requirements, deal with potential risks, and define project information communication routes to stakeholders."

The major difference between the traditional description of stakeholder management and that of the event industry is the quantity of stakeholders and objectives that may change in a complex environment. In other words, the number of stakeholders and the number of changes in the normal course of event management, when compared to the PMBOK model projects. A change in quantity produces a change in quality and priority. As is pointed out in other sections of this thesis (Chapters 1, 2, 7 and 8), in a deadline situation, core management process must have preference. For this reason, proactive stakeholder management is a core process for event management. This will be demonstrated by a review of the current literature and a comparison to the event documentation. Figure 3.1 illustrates the stakeholder management process for events.
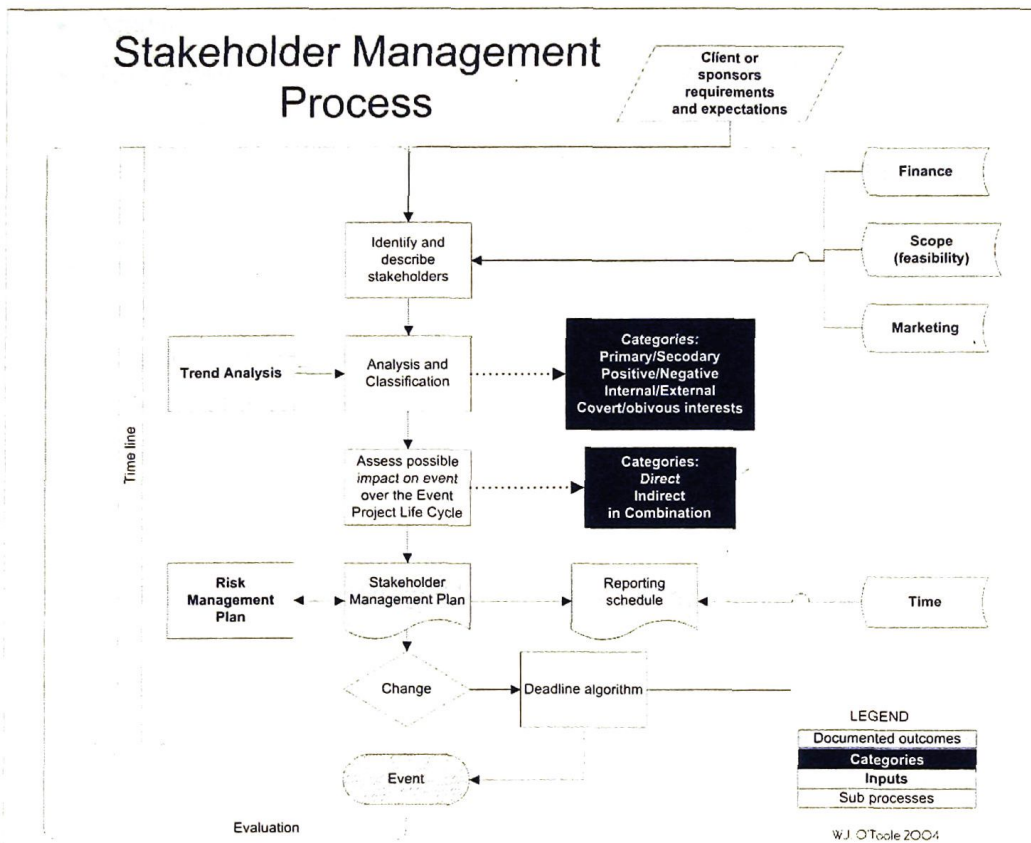
Figure 3.1 Stakeholder management process

Stakeholder classification

A large part of the standard event literature deals with the role of the stakeholders. It tends to be used in a specific sense of the type of stakeholder. In the first edition of the Dictionary of Event Management, the term "stakeholder" is not found. (Goldblatt 1996).

The process of stakeholder management is generally distributed between

1.   Sponsorship

2.   Suppliers

3.   Audience

4.   Legal issues

Allen et al (2002)classifies the stakeholders into:

- Host Organisation

- Host Community

- Sponsors

- Media
- Co workers
- Participants and Spectators

Allen et al (2002) states that the need for stakeholder management is a result of the growth of events, their professionalisation and the increasing support from governments and corporations. Therefore events need to serve multiple agendas and a plethora of other requirements.

Such a classification tends to identify only primary stakeholders. Secondary stakeholders, such as government agencies and licensing bodies, who have an interest in the event if it passes a threshold of interest (Business Excellence Australia 2003), may not be captured by Allen's classification.

Although all the above are managed by the same process, it is one of the unrecognised processes in the event management literature. It is important to point out that the term event management used in this chapter (and the thesis) refers to the internal management of the event rather than the looser term used in tourism literature of the external management of the events such as from a sponsor's point of view. See *Event Management* in the glossary section of this thesis for further explanation of the use of this term.

Sponsorship

The most developed stakeholder management process description is found in the numerous articles and books on the event sponsors. As the sponsors provide the finance, or defray the costs by providing in-kind services, they are seen as primary stakeholders. According to the Dictionary of Events Management (1996) the term 'sponsor' in event management means:

"1. One who assumes all or part of the financial responsibility for an event
 2. A commercial sponsor that provides financial backing for an aspect(s) of an event and who in return receives visibility, advertising, or other remunerations in lieu of cash"

As is revealed by the definition, sponsorship management is in part a risk management strategy to minimise the uncertainty of event finance.

The number of sponsors for even the smallest event may be huge, when compared to other types of projects. A small regional event in rural Australia, the Ulladulla Summer Games, lists 93 minor sponsors and 12 major sponsors. The later had in-kind or cash contribution of over $1000 (Ulladulla Summer Games 1999 Report). Using the stakeholder classification matrix (Business Excellence Australia 2003) all these sponsors can be designated as external and primary. They can exert a positive or negative influence on an event. The likelihood of business change occurring to such a large number of sponsors is high and therefore leads to an uncertainty in event finance. Their strategy for risk minimisation is to spread the risk by increasing the number of sponsors. This is further discussed in Chapter 8 *Risk Management.*

An additional difference between the project management model and events is the job of seeking and developing sponsorship. This is seen as a critical function of event management. The PMBOK model of stakeholder management assumes that the project manager does not actively seek out the stakeholders. However a large part of the role of event management is to seek and develop sponsorship (Goldblatt 2002; Allen et al 2002; Jackson and Schmader 1990). Sponsors are often the initiator and client of the event. The event is a part of the marketing strategy of the sponsor. This adds an essential task to the stakeholder flowchart - the development of a sponsorship invitation or proposal. Figure 3.2 illustrates the process involved in this aspect of stakeholder management.

Sponsorship Management Process
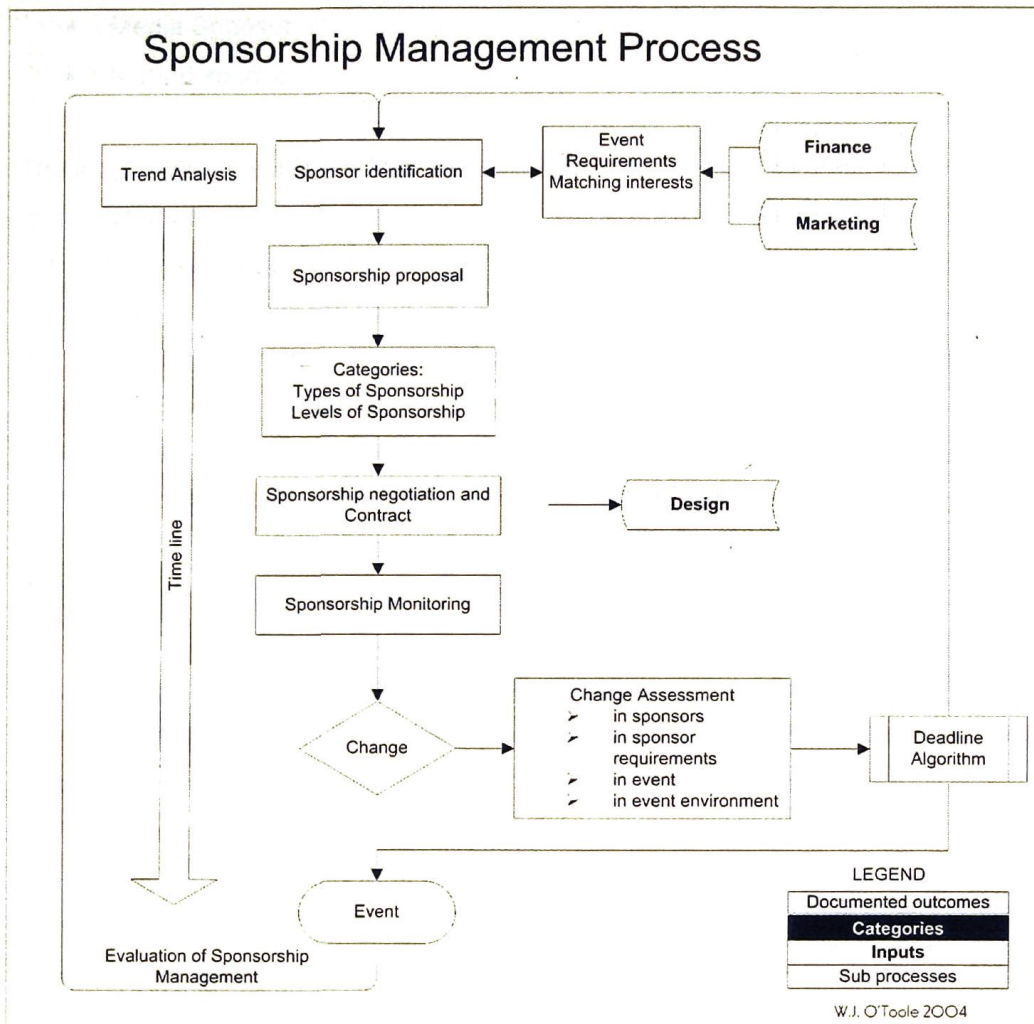
Figure 3.2 Sponsorship management process

Hospitality plays an important role in sponsorship development (Geldard & Sinclair 1996; Allen et al 2002). It is can be an essential part of the event product.

Sponsor Management

The monitoring and controlling of the sponsors is the same process in both stakeholder management and sponsor management. One technique employed be event management is to set up levels of sponsorship. This establishes a standard and therefore assists controlling the relationship between the sponsor and the event. The levels of sponsorship are related to the types of sponsorship. Jackson and Schmader (1990) suggest these categories:

- Exclusive sponsor - also called the naming sponsor
- Presenting sponsor - sponsoring a part of the event
- Co -sponsor - share sponsorship of an area of the event

- Media Sponsor
- In Kind sponsor

The level of sponsorship enables the stakeholder to establish an initial commitment to the event while minimising their possible financial exposure (Van Der Wagen 2001). It allows the sponsor to change their level of sponsorship in a planned manner. In many cases the event will grade their sponsorship by using marketing terms. Sporting events may use the terms *gold, silver*, and *bronze* to signify the level of sponsorship. The comparison to project stakeholder management is evident that each of these levels can be mapped to the classification of project stakeholders as primary, secondary, direct and indirect (Business Excellence Australia 2003).

The Sydney Olympics used the competitive tendering process to fill the three levels of sponsorship (Operations and Services : Sponsorship and Marketing : Page 2):
1.   Team Millennium Olympic Partners (TMOP)
2   Supporter - at this level the sponsor was granted the rights for Australia only and was allowed to use the Sydney 2000 marks in electronic broadcast media
3.   Providers
The Sydney Olympics continually sold sponsorship rights during all the phases of the event project cycle until the beginning of the games. The level of sponsorship allowed the organisation to control the, sometime dramatic, increase in the number of stakeholders in this area.

A further technique of sponsorship management is the sponsorship of sections of the event. The East Timor Independence day offered eight sections of the event to sponsors. These component events included:
- Pyrotechnic Display
- Hospitality and Services to the International Delegation of Heads of Government Cultural Spectacle & Ceremony to Celebrate the Independence of the Republic of East Timor

The sponsorship rights sold included:
- Naming rights
- Hospitality, such as access to VIP functions
- Signage and Banners

(East Timor Ceremony Sponsorship n.d.)

Many sponsors will not commit to the event until they are sure that it will be a success. In which case, their support for the event unlikely to happen during the initiation phase of the project life cycle. Other sponsors will only commit once they have seen the event endorsed by a large established company or a government body (Allen et al 2002, Geldard & Sinclair 1996). This leads to the common quandary for the event management whereby no company will sponsor the event until other companies have sponsored it. Such a situation is not dealt with in any of the standard texts on project management.

Partnering is a common technique for the management of the risk of having too many sponsors. Partnering has the added advantage of employing the sponsor's resources, such as marketing, accounting and legal services as well as cash (Allen et al 2002). According to Geldard & Sinclair (1996, p. 28):

"A partner may be sought where an event or organisation requires substantial funds to underwrite a project. The partner will enter into an agreement with the seeker of the funds and will have rights to the project or venue for its useful life, or for an agreed lengthy period. Usually funding is via a once only payment at the commencement of the project."

The tools of partnering and establishing various levels of sponsorship can be regarded as a risk management strategy in a climate of change. In the events used in this thesis and the case studies in the various event texts there was no freeze on selling sponsorship. It continued throughout the projects cycle and in some cases sponsorship was sold after the events for the products of the event – such as videos and mementoes (Allen et al 2002).

The conclusion from the literature and the event documents is that the project management model of stakeholder management is used in the management of event sponsors. However this model of project management stakeholder management is necessary but not sufficient to model the process in events management.

Other Stakeholders

Although sponsorship management is vital to the success of many events, there are numerous other parties with an interest in an event.

The largest group of stakeholders for most events is the attendees. They can be variously described as spectators, participants, audience, ticket holders, or guests depending on the type of event. The management of this group of stakeholders is complex and takes a large part of the event's budget. However, they are often the primary source of the revenue for many events. The stakeholder management used for attendees is proactive. It seeks to manipulate expectation of the attendees prior to the event. This is further explored in the chapter 5 on Marketing. An example of this is provided by the Communication Plan of the Sydney 2000 Olympics. One of the primary objectives of the plan was to:

"ensure appropriate levels of attitudinal change amongst the target groups" (Official Report of the XXVII Olympiad 2001, pg001587.htm)

The Communication plan included " a mix of key emotional and rational messages; such a mix is very important in achieving attitudinal and behavioural change" (ibid, pg001593.htm)

The manipulation of the key stakeholder is in contrast to the project management outlined in the PMBOK and the major texts. As discussed in the chapters on Marketing and Communication, the ability to change expectations and perceptions of the stakeholders is an essential tool in event management.

Johnson's study of the east Timor Handover Ceremony lists twenty primary stakeholders. (Johnson 2002). These include a large number of international organisations such as the UN, International News Media and Catholic Church His analysis grouped the numerous sponsors of the ceremony under the one category, International Companies. There are only five identified secondary stakeholders - those who will be interested in the event if it passes a threshold of importance (Business Excellence Australia 2003). However these include large complex organisations such as the Indonesian Government and the US Department of State. A large part of the risk in stakeholder management arises from the involvement of vastly different organisational and social cultures. These range from the subsidence farming economy with little infrastructure to the highly technical requirements of the international media companies (Johnson 2002a).

Grouping of stakeholders by their common interest in the event, is a management technique. The NSW Premier's Department and the Olympic Coordination Authority found this to be an effective strategy and has continued it use after the Olympics.

" In September 1999, the NSW Premier's Department and the Olympic Co-ordination Authority established a secretariat for "Government Coordination" or what is now referred to as "Stakeholder Coordination." The objective was to improve across Government communication, coordination and planning and thus minimise the identified risks for Millennium Celebrations. Forums were established for both operations and media staff of all relevant Government Agencies, as well as a separate forum for local councils around the foreshore of the harbour." (Premiers Department NSW 2002).

Further on, the report comments on the success of grouping the stakeholders:

"Due to the success of Stakeholder Coordination and the many major lessons learned from the Millennium Celebrations, it was decided to expand the concept to strengthen preparations for the Coordination of the Sydney 2000 Olympic & Paralympic Games" (Premiers Department NSW 2002).

Finally the report gives more tangible reasons for their success:

"Through greater communication, Stakeholders have the opportunity to learn and listen to the roles and issues that other Stakeholders face. Although there is frank discussion regarding some incidents and issues, Stakeholders more openly admit mistakes, issues or problems that their Agency experienced, thus increasing their ability to learn. Therefore issues can be looked at as they concern each event and the Government as a whole, rather than how they affect an individual Stakeholder" (Premiers Department NSW 2002)

The number of stakeholders and complexity of their relationships is shown in Figure 3.3.

Figure 3.3. Centenary of Federation Celebrations, Event Stakeholder list, NSW Premiers Department

ORGANISATION	Mktg & Comm	Funding	Access	Event Logistics	Volunteers	Event Content	Traffic & Transport	Cleansing	Decorations	Environmental Control	Crowd Mngmt	Invited Guests	First Aid/ Emg Service
NSW State Gov't		*											
RTA	*						*						
NSW Taxi Council							*						
STA	*						*						
Dept Transport	*						*						
Police							*				*	*	
NSW Ambulance Service													*
ST John													*
NSW Emergency Services													*
Dept Health										*			
Dept Aboriginal Affairs						*							

Engineering Events

ORGANISATION	Mktg & Comm	Funding	Access	Event Logistics	Volunteers	Event Content	Traffic & Transport	Cleansing	Decorations	Environmental Control	Crowd Mngmt	Invited Guests	First Aid/ Emg Service
Premier's Department												*	
Dept Education						*							
Disabilities Council	*		*										
Royal Blind Society	*		*										
Ageing & Disability	*		*										
City of Sydney	*	*		*			*	*	*	*	*		
C&MPT	*			*	*			*	*	*	*		
SOH Trust				*									
Royal Botanic Gardens & Domain Trust				*	*			*?					
Sydney Foreshores				*				*?	*?	*			
Eastside Institutions				*									
SCG Trust				*									
Ethnic Affairs Com						*							
Aust.Defence Force						*							
Dept Defence						*							
Dept Vetrans Affairs						*							

ORGANISATION	Mktg & Comm	Funding	Access	Event Logistics	Volunteers	Event Content	Traffic & Transport	Cleansing	Decorations	Environmental Control	Crowd Mngmt	Invited Guests	First Aid/ Emg Service
Civic Aviation Safety Auth.						*							
Air Services Aust.						*							
National Trust						*							
NCCOF		*											
South Sydney Council	*			*			*	*	*	*	*		
Randwick Council	*			*			*			*	*		
Waverley Council	*			*			*	*	*	*	*		
Woollahra Council	*			*			*	*	*	*	*		
Sutherland Council	*						*	*					
NSW Regional Arts board						*							
Capital PR	*												
Channels 7&2	*												
News Ltd	*												
Volunteering NSW					*	*							
Rotary					*	*							
SOCOG					*								

ORGANISATION	Mktg & Comm	Funding	Access	Event Logistics	Volunteers	Event Content	Traffic & Transport	Cleansing	Decorations	Environmental Control	Crowd Mngmt	Invited Guests	First Aid/ Emg Service
SES					*	*							*
Rural Fire Services					*	*							
Guides Australia					*	*							
Coles Myer		*			*								
State/Territory COF	*					*							
Friends of the Gardens					*								
Friends of Cent Park					*								
NSW Rovers					*								
Clean-up Australia					*								
Aust Red Cross					*								
Royal Lifesaving Aust					*								
Friends Taronga Zoo					*								
Art Gallery of NSW					*								
MCA					*								
Powerhouse Museum					*								
SSO					*								
Youth Music Aust					*								
Opera Aust					*								

ORGANISATION	Mktg & Comm	Funding	Access	Event Logistics	Volunteers	Event Content	Traffic & Transport	Cleansing	Decorations	Environmental Control	Crowd Mngmt	Invited Guests	First Aid/ Emg Service
Aust. Volunteer Coastguard					*								
Aust. Volunt. Coastal Patrol					*								

Reproduced with permission EPMS CDROM 2003

Many of the techniques used in these meetings with the stakeholders were risk management tools. The report mentioned that part of the success of the Stakeholder Coordination was that the participants learned to use risk management as a group technique. In particular, the scenario development technique enabled the stakeholders to understand and manage the interdependencies between the numerous agencies, such as Road and Transport, Emergency Services, and the Police . Ten disaster scenarios were give to the group to consider their responses and coordinate these planned actions between the agencies (NSW Premiers Department November 2001).

Stakeholder Management of the Event

The grouping of stakeholders can be initiated by the stakeholders as well as the event team. It can be a strategic management decision by major organisations to create a standard process in order to manage their relationship with a multitude of events. The rules and regulations regarding the use of public roads means that the stakeholders for a public event may include:

- Local Council
- Workcover
- Police Service
- Road and Traffic Authority (Road and Traffic Authority 1999)

The complexity of the relationships lead the Road and Traffic Authority to publish "Traffic Management for Special Events" (Road and Traffic Authority 1999). The USA has a similar manual dealing with its relationship to the events held within its jurisdiction (US Department of Transportation 2003). Both these manuals assist the event performing organisation (the event team) with the planning of the events. They start by classifying the event according to its affect on traffic flow. As stated in the introduction of the Traffic Management for Events (Road and Traffic Authority 1999, p. 1):

"This guide focuses on the issues, which handled correctly can improve the quality and safety of public events... Although a comprehensive event planning process cannot guarantee a problem free event, the involvement of key stakeholders and the commitment of adequate and suitable resources can greatly reduce the potential concerns. Such planning can also enhance the ability of event managers to effectively respond to any problems that may occur"

Another initiative by some primary or key stakeholders is to create the planning pro forma document for the event. The Liquor Licensing Division of the Queensland Department of Tourism, Sport and Racing produced A Planning Guide for Event Managers (1999). This online booklet is used to assist with the planning of the event and to comply with the requirements of the various legal stakeholders in the event. As well, it is a risk management strategy and enables decision making in the event environment.

The next step for a major client or sponsor of the event is to produce a comprehensive planning manual for the whole event. As stated in the Event management; Planning Guide For Event Managers in Victoria (Government of Victoria 2004, p. 6):

"The Victorian Government is concerned that substantial improvements are made to the planning and running of major events so that the well being of patrons is protected. This planning guide will help event managers and event organising committees ensure that events are safe and enjoyable for all participants"

These primary resource documents illustrate that many of the stakeholders do not expect to play a passive role in the planning of events. Their requirements are complex and often involve the active participation in the event management decision making in all the phases of the event project life cycle.

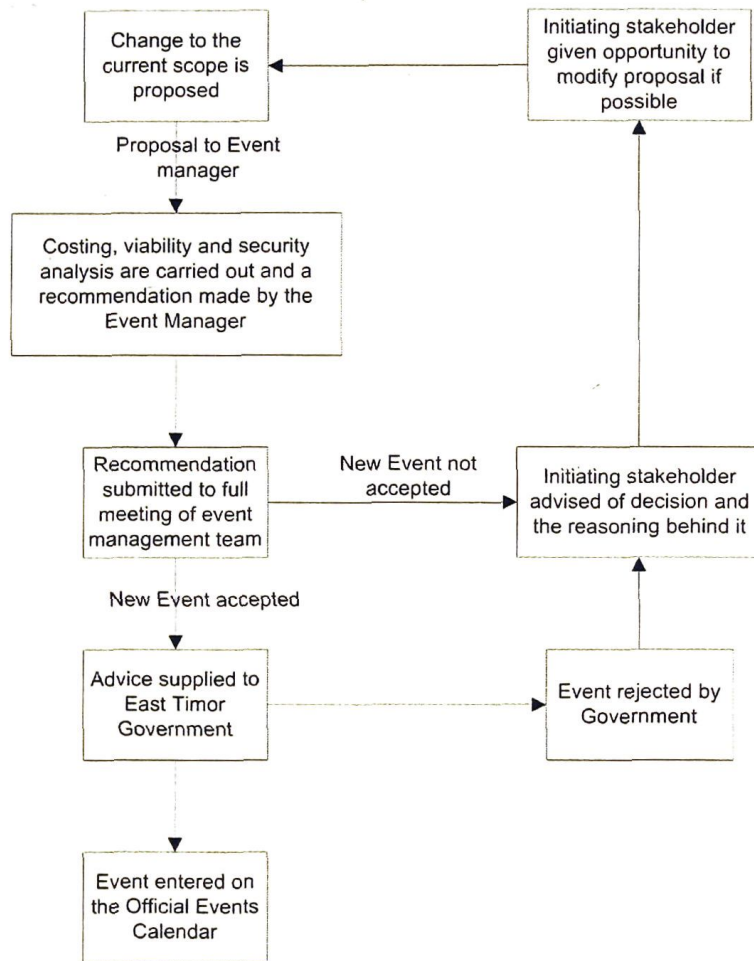# Johnson's change control process for East Timor

Figure 3.4 Change control process

The active involvement of key stakeholders in all phases of the event management, lead Johnson (2002a) to propose a procedure for change during the phases of the East Timor project. He used this as a way to control the numerous changes. The control flowchart is illustrated by Figure 3.4. However it is important to note that Johnson mentions that the signoff procedure became too unwieldy when there were any changes. The deadline of the event did not allow this process to be followed as it neared. As Johnson states in his analysis of the independence day event in East Timor:

"The UN in general and UNATET itself are highly bureaucratic with a very hierarchical responsibility adverse structure …. On the other hand, an event requires creativity and flexibility" (Johnson 2002b, p. 1)

In outlining the formal methods of stakeholder management it is important that, in a complex environment governed by a fixed deadline, informal processes can be imperative. As Coons (1999, p. 69) points out:

"One of your most important tools for staging a successful event is contacts - who you and members of your event team know (or come to know) among leaders in the community and the media. The ability to make contacts and use them well is a vital key to your event's success."

Summary

When compared to the PMBOK, event management entails complex relationships with multiple stakeholders. The use of requirements analysis is not sufficient to establish a stable setting in which to deliver an event. The number of stakeholders will change over the project and the intangible nature of the product result in an ever changing and uncertain project environment. Even the simplest event will have multiple stakeholders. The influence of the stakeholders will be felt on the event throughout the phases of the project. Each event attendee is a stakeholder and their objectives and requirements may be unique, changing and intangible. Event management uses tools to reduce the resulting uncertainty. Marketing is used to group, influence and manage the changing requirements of the attendees. Event management has developed sophisticated tools to assist with the management of sponsors. These tools, such as sponsorship development, marketing, promotion and the manipulation of stakeholder requirements and expectations, are not found in the PMBOK.

Chapter 4 Design Management

For the purpose of this thesis, *design* is defined as a purposeful arrangement of elements of an event to maximise the positive impression on the attendees. Therefore it solely concerns the event itself. The term is generally used in conjunction with the object of the design process such as lighting design (Allen et al 2002), décor design (Silvers 2004), and site design (O'Toole 2003). Design has artistic and creative inputs. The design management process is illustrated by Figure 4.1.
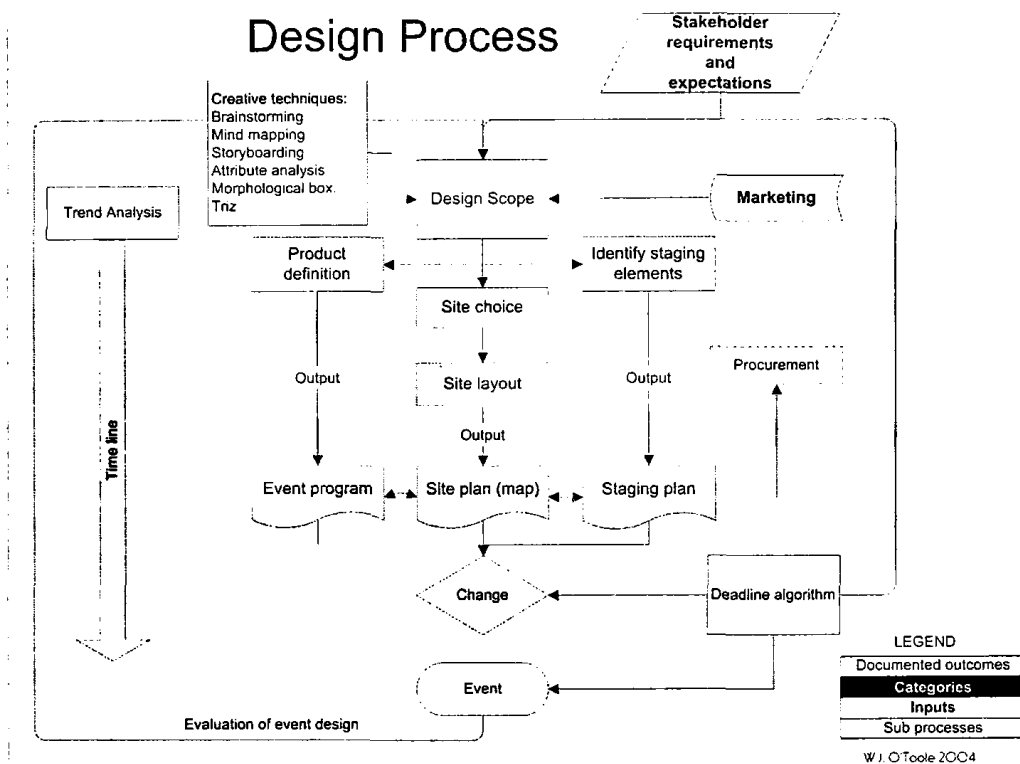

Figure 4.1 Design management process

The areas of event management involved in the design process are:

- Staging - including the elements of staging (Allen et al 2002, p. 361) such as lighting, sound, catering
- Site/venue location and layout
- Theatrical considerations including the look of the event
- Event program or content
- Wow factor - or unique experience (Malouf 1999)

PMBOK (2000) does use the term design in discussion projects. However it is used in the sense of a separate phase in the project life cycle. The Design phase is found at the beginning of the cycle after the feasibility. In many cases, traditional projects would be given the completed design of the end product.

Part of the work of the event management is to create the product as well as managing the process to create the product. This is an area that is outside most texts on project management. With the exception of the research and development projects, the project manager may refine the design of the end product but does not create it.

It is part of the marketing process to assist in the creation and redefinition of the product at the same time as the project plan is being formulated. Marketing is an ongoing process with continuous inputs into the organisation of the event. Chapter 7 describes the marketing management process in detail.

Staging

The staging of the event is an example of a term that is hampered by a lack of standards within the event industry. It is used as a general term for all the activities that make the event occur. Its use is non-specific and tends to denote all the activities to organise and conduct the event. The term is used in this sense for the Olympics (Official Report of the XXVII Olympiad 2001).

Allen et al (2002), O'Toole (2003) and Silvers (2004) use the term to mean the arrangement of staging elements at the event site. These elements are illustrated as circling the theme of the event in Figure 4.2.The event theme is then the basis of the event design of the staging and has an input into venue (site) choice and layout.

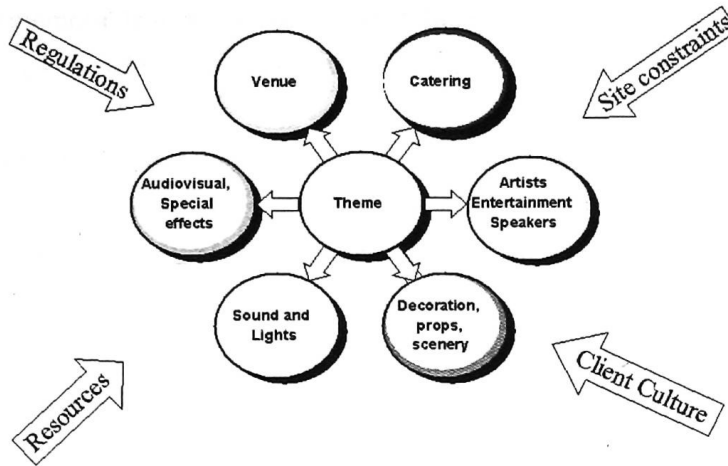**The Elements of Staging - revolving around the theme**

Figure 4.2. Staging elements, source: O'Toole 2003, reproduced with permission

The staging area of the event utilises a number of tools and techniques that are called mini logistics by one author (Allen et al 2002). These mirror the tools of project management and include:

- Schedule
- Task/responsibility list
- Site map or stage plan
- Contact list (Allen et al 2002)

The management used during the event is different in style to the event preparation.

Wow factor

The term is used by Allen et al (2002) and Citrine (1997) to describe the intangible feeling of the event participant. Using the definition of design above, the Wow is part of the impression gained by the attendee. It is regarded as essential to many events as it makes them special and surprising. The Wow factor is related to the creativity and the creation of special ideas (Surbeck 1991). Goldblatt (2002) states that creativity in the event management is a requirement from the client for many events. Goldblatt (2002), O'Toole & Mikolaitis (2002) and Silvers (2004) describe tools and techniques to assist this creative process for events. These include:

- Brainstorming
- Mind mapping
- Storyboarding
- Attribute analysis and Morphological box.

TRIZ (O'Toole & Mikolaitis 2002)

Malouf (1999), stresses the use of the imagination, and innovation in producing a unique and memorable event. Getz (1991) states that special events must be perceived to be outside of normal experience and above the commonplace.

Design is a general term for all the aspects of the actual event rather than the management functions. For this reason most event manuals and handbooks are concerned with this aspect of event management.

If the event is regarded as the asset in traditional project management terms, then the event manager's role is the design of the asset, not just managing the creation of the asset. In a comparison with the building industry, the construction project manager would also have the job of the architect. The role of creator, which may include initiator and designer, and project manager are part of the event manager role, then the design does not have to be fixed. It can evolve at the same time as the project management. For this reason the concept of change control and sign off is often impractical, or, at least, cannot be used as a simple tool to control the changes in event management.

Site /venue location and layout

Site or venue choice and layout is identified by most event authors as an essential element in event success (Getz 1997; Allen et al 2002;O'Toole & Mikolaitis 2002). Citrine (1997) regards it as important programming and suggests that the layout is integral to the "wow" factor. The choice of the site crosses all the areas of event management. The site choice involves input from the stakeholders such as the sponsors. The site choice will be influenced by, and has an influence on, the risk management decisions and marketing. However the site choice reflects one of the fixed deliverables of the project management process. Once the site has been selected it will remain fixed, in a similar way, the date is fixed. For this reason the constraints of the site are integral to any decision in other areas of event management (O'Toole & Mikolaitis 2002). Some of the large events prefer to construct the site, in which case the event project becomes part of a much larger project that includes construction and other aspects of civil engineering. The result is an interface of two projects (Official Report of the XXVII Olympiad 2001; Timmins 2002). Figure 10.2 in Chapter 10 Procurement, contains the site choice flow chart.

Once the decision has been committed to, the design of the layout of the site becomes the major way to minimise risks. The site moves from a variable in the marketing mix to a parameter.

The changes in marketing will have a significant influence on the design of the layout of the event. The financial penalty for changing a venue is a major incentive to minimise any changes (Allen et al 2002).

Programming and the program

Programming is the core of the design process. It originates from the product definition and is the creative process that blendes many elements into an attractive event. (Getz 1997, p.159). The program is the deliverable of the programming process. It is "both the substance of the event and the way in which it is scheduled and produced"(Ibid). Therefore the deliverable is the schedule of the event itself. It is an output of the product definition and lists what is on at the event and when it occurs. Harris & Allen (2002, p. 44) notes that the program includes arranging the elements to create maximum impact on the audience.

"In creating the program, it is important to consider the flow of performances and activities, so that the interest of the audience is maintained. It will be important to consider the shape of the program - the rise and fall of intensity and emotion that it evokes in the audience, and the build-up towards the a final climax."

This quote illustrates the intangible and ephemeral nature of the core of the event. For many events the audience reaction is the ultimate event product and therefore is a further source of uncertainty.

Getz (1997) notes that the tightness of the schedule, or the leeway for the times, can vary according to the type of event. In particular events that are broadcast have tight schedules. At other events, the schedule may be an indicator of time, rather than followed closely.

Summary

Design of the event offers a significant departure from the PMBOK. An event manager will go from the client's brief to design the event. The project management process can be seen as a supporting function that delivers the Design. However the Design is not static and must respond to changes arising from marketing and risk. Figure 4.1 illustrates that the Design process concerns three areas that are concurrently managed. These will interact with each other as the planning

progresses. By the definition, events have special or unique characteristics. Therefore many aspect of the design process and its outputs are necessarily uncertain.

Chapter 5 Event Marketing

In PMBOK 2000 the closest area of knowledge equivalent to Event Marketing is Project Quality Management (Chapter 8). The separation of the quality of the product and the quality of the management is made on the first page. Figure 5.1 illustrates the marketing process for events.

Marketing Process

Client or sponsors requirements and expectations

Trend Analysis

Market Research → Defining Event Objectives

Target market identification/ needs analysis → Market Segmentation - matching

Consumer decision analysis → **Communication Promotional Strategy**

Marketing Mix - optimizing variables product, promotion, price, place → **Scope**

Design

Time line

Product definition

Change → Deadline algorithm

Event

Evaluation of Marketing

LEGEND

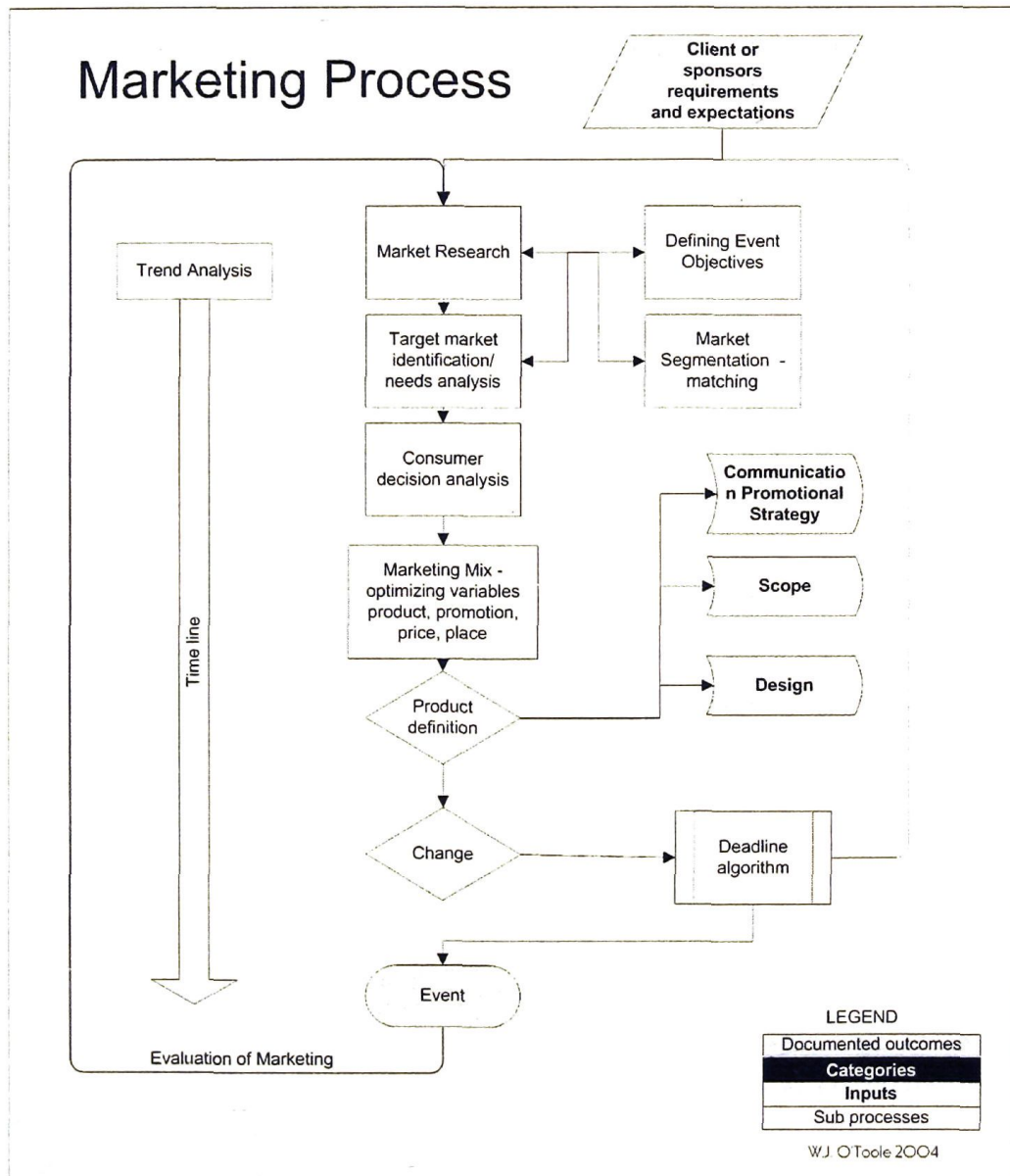| Documented outcomes |
| --- |
| **Categories** |
| Inputs |
| Sub processes |

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Figure 5.1 Marketing management process

Product Quality

A large section of event literature is devoted to establishing, monitoring and evaluating the quality of the product, that is, the event. According to PMBOK Quality is the "totality of characteristics of an entity that bear on its ability to satisfy stated or implied needs" (p. 96)

Quality planning is established by first identifying standards.

This is similar to the common definition of marketing. Marketing is defined by the Chartered Institute of Marketing (CIM) as "the management process responsible for identifying, anticipating and satisfying customer requirements profitably." (Bowdin et al 2001, p. 114)

According to Hall as quoted in Allen et al (2002, p. 162):

"Marketing is that function of event management that can keep in touch with the event's participants and visitors (consumers), read their needs and motivations, develop products that meet these needs, and build a communication program which expresses the event's purpose and objectives." Note that this definition shows that marketing is active and ongoing. It implies that the event is responsive to the changing needs and motivations.

Getz (1997) divides event quality into program quality and service quality. Program and service make up the product. Both of these are seen as part of the customer's experience. Program quality is seen as an ongoing process in need of evaluation and improvement. The program can be seen as made of up of style elements. Therefore, *style,* as found in fashion, artistic expression and manner of expression, is fundamental to program quality. Service quality is different from program quality and is a complex mixture of elements ranging from staff/customer interactions to promptness of the program. The success or failure of program and service are measured by their comparison to the expectations of the target audience.

Marketing Process

Events and festivals share many of the characteristics of service industries as they require a different marketing process to that of manufactured goods. Middleton (1994) and Shone (2001) list these characteristics as:

- **Inseparability** - the consumption and production of the product take place simultaneously.

- **Perishability** - the event occurs at one point in time. If the event does not go ahead, the marketing expenditure is lost. It is difficult or impossible to resell the event, as can be the case with manufactured products.
- **Intangibility** - the experience of the event by the customer happens at the event itself. It is unique and cannot be experienced before the event. Theis leads to the conclusion that the manipulation of customer expectations is an important technique to event success. Intangibility also means that event experience is difficult to measure.
- **Heterogeneity** - each customer of the event may have a different experience.

All these characteristics contribute to the uncertainty and complexity in the management environment over the event project life cycle.

Using the PMBOK definition of Quality, the problem for the event performing organisation (the event team or company) is discovering and describing the "stated or implied needs'". As discussed in the chapter on Stakeholders (Chapter 5), these needs are many, varied and may change over time. The term the 'customer' will involve the large number of people who attend the event and those who witness it through the media. Each attendee can have their own set of motivators for being attracted to the event.

The alternative to using the needs analysis of the key stakeholders is to compare the quality of the product to an external standard. Currently there are no government-endorsed standards for the event industry (Silvers et al 2005). Some event industry associations have created of certification programs such as "Certified Special Events Professional" of the International Special Events Society (ISES) and the "Accredited Member MIAA" of the Meetings Industry Association of Australia (MIAA). There are industry awards programs such as International Festival and Events Association awards and ISES awards recognising excellence in their member's events and event related products. Arcodia and Reid (2000), in their survey of event associations around the world did not use the term quality. However the ten categories such as reputation, ethics and education, that were used by Arcodia and Reid implied a strong interest in improving quality. These are internal industry standards and there may not be a direct correspondence with those of the various customers.

Market Segmentation

Discovering the needs and motivators of the customer is the major focus of event marketing. For events that have a large customer base, such as public events, there are a number of tools to do this. Maslow's theory of a hierarchy of needs is adapted by Getz (1997) to the event environment. Market Research techniques are used to match the event product to the needs of the market. Van Der Wagen (2001) takes this a step further and proposes that the event marketer should understand the motivational needs of the target market.

The research may be part of the event feasibility study and therefore performed during the initiation phase of the event project life cycle. In this way the marketing process begins in the initiation phase and forms part of the scope and product definition.

To assist the discovery process, other tools are used such as Market Segmentation. This is the division of the potential market into groups with common characteristics that can be utilized in the event marketing (Getz 1997;Allen et al 2002). It facilitates the management of the event marketing through clustering.

The needs assessment result is transformed into the event objectives. It is recommended that these objectives be defined using the SMART criteria. They must be Specific, Measurable, Agreeable, Realistic and Time specific (Allen et al 2002). The ill-defined needs (Silvers 2004) may be used as a measure to assess the quality of the event. The SMART criteria may be seen as a method of reducing the uncertainty inherent in the needs analysis process in a complex environment. The limitation of the *event management by objectives* is a result of the changing event environment and the influence of the deadline. The changing event environment such as extra sponsors, new opportunities for promotion, legislation, competition for other events, changes in the objectives of the stakeholders will reduce the efficacy of the original event objectives. The absolute deadline does not allow time for the whole needs assessment process to be repeated. Therefore, both these factors, which at are common in event management, will result in the objectives becoming irrelevant to the new conditions (O'Toole & Mikolaitis 2002).

Marketing Mix

An important tool in event marketing is the Marketing Mix (Getz 1997;Bowdin et al 2001;Goldblatt 2002).

The marketing mix is a group of marketing variables that can be altered and controlled so that the event achieves its objectives (Getz 1997;Allen et al 2002). The aim of event marketing is to optimise these variables. The marketing variables included in most event texts are:

- Product - all the elements that make up the event
- Price - the value of the event to the consumer
- Promotion - marketing communication between the consumers and the event
- Place - location of the event and the point of ticket purchase (Van Der Wagen 2001; Allen et al 2002).

Other authors identify further variables such as people, programming and partnerships (Getz 1997).

The Product, the event, is therefore a variable and part of the marketing mix. Combining this with the Middleton (1994) description, the event is both intangible and changing in response to marketing. The marketing mix will be optimised during the event project life cycle. The significance of this explains a major difference between the PMBOK model of project management and the event management model. The asset or product is not highly defined at the beginning of the life cycle. It is a variable, created and developed by its own marketing. This degree of uncertainty means that the risk management model can be employed.

"Market research can help to reduce uncertainty and therefore the risk of failure" (Watt 1998, p. 64)

A number of marketing tools are used to reduce the product uncertainty. In particular the Boston Consulting Group Matrix for product division is employed (Getz 2001). The outcome is a product analysis of the event portfolio. The Ansoff matrix is utilized to create a strategy for marketing (Allen et al 2002).

The marketing mix is therefore a feed-forward or predictive control (Allen et al 2002) device for project definition by reducing the uncertainly inherent in a changeable and intangible product.

Event management texts such as Getz (1997) and Goldblatt (2002) have large sections devoted to the adaptation of marketing theory to events. Note that events are both a product of marketing and often used as a tool of marketing. It is part of the marketing mix of destinations and corporations (Getz 1997). The term 'event marketing' is used to denote the advertising or promotion of a product through the use of events Jackson and Schmader 1990).

The purpose of the six million dollar, 1996 series of events called New Horizons, in India was to market the product and services of Australia (Buchan Communications Group 1997). This type of event was termed a country wide promotion (Australia India New Horizons - Project Directory 1996). As a result of the success of the new Horizons events, a similar nationwide series of events called *newImages*, was organised by the UK government in Australia. Their mission statement illustrates how the events are used as part of the marketing mix.

"New Images will be a year long. Australia-wide programme of events throughout 1997. New Images will highlight the modern, evolving relationship between Britain and Australia and the opportunities for forging new partnerships into the 21st century. Events will cover the full spectrum of this vibrant relationship, including culture, science and technology, sport, politics , media trade and investment, etc. New Images will promote a fresh awareness of Britain and Australia as dynamic, innovative nations and will reach millions of people." (The British Council 1997, p. 2). The quote also illustrates the intangible nature of the aims of these events.

Marketing has primary inputs into the event design process. It is also a risk management technique to reduce the uncertainty related to sponsorship, financial management and stakeholder management. Marketing can also be viewed as a feed-forward control mechanism, whereby the product is designed to fit into the results of the marketing process.

The promotion variable of the marketing mix is treated with detail in the various event literatures. Event handbooks or manual (Tonge 2000, Community Festival Handbook 1991, Curry, B 2001, Making Dollars and Sense out of Community Events 2001), devote large section to the promotion of the event. The communication aspect of promotion will be encompassed by the model for event communication found in chapter 9 Communication.

The risks in event marketing are unique due to the deadline. Ambush Marketing is a recognised major risk for large sponsored public events. Ambush marketing is the "strategy employed by non-rights holding companies to create an appearance as if they are the official event sponsor" (Grahame 1995, p. 102). The marketing campaigns of the competing airline companies, Ansett and Qantas, provide an example of the importance of these issues to the Sydney Olympics (Kendall and Curthoys 2001).

Promotion

The promotion variable of the marketing mix is a way to manipulate the customer's expectations. This is necessary as a risk management strategy so that the expectations will be satisfied. This makes promotions a proactive tool in event management, rather than a responsive tool (Getz 1997). As stated by Shone (2001, p. 181):

"'What we are seeking to create is the desire for the product, through encouraging people to feel that the event will fulfil their particular needs and by generating a positive 'buzz' about the event."

There is no mention of this variable in PMBOK 2000 or any of the project management texts used for this thesis. The requirements of the stakeholders are not subject to manipulation by the project company.

Event promotions must be able to respond quickly to changing conditions and recognise promotional opportunities. There are deadlines within a promotion campaign (Catherwood & Van Kirk 1992; Tonge 2000). The promotion campaign becomes a sub-project within the larger event planning with inputs into the event design.

Event evaluation is regarded as part of event marketing, as it primarily concerns itself with evaluating the customer experience. It is a feedback device and important part of continuous improvement for repeat events. Unfortunately most event texts use the term evaluation to mean the evaluation of the event.

Quality of Management

The event management process described in this thesis is unfortunately is not described and therefore, hidden from view in most event literature. For this reason the ability to assess the quality by identifying gaps in the management and management best practice is impossible. Of the primary texts on event management and the current literature in journals, only a handful describes how to monitor and assess the management of the event (Goldblatt 1999; Goldblatt 2002; O'Toole & Mikolaitis 2002). Although some mention the importance of the management process, event evaluation is seen as evaluating the impact of the event on the stakeholders, in particular, the customer satisfaction. Three fundamental types of evaluation are described by Getz (1997):

- Formative - during the feasibility phase

- Process - during the operations of the event
- Summative - after the event

None of these involve the evaluation of the event management, except indirectly as a result of the evaluation of the event. There is no framework given to assess the management. Of the two academic conferences on events, the six papers on event evaluation concern evaluation of the impact of events on host communities or the customer satisfaction (Events Beyond 2000; Events and Place Making 2002;). In their text on festival management Allen et al (2002, p. 389) describe event evaluation as 'the process of critically observing, measuring and monitoring the implementations of an event in order to assess its outcomes accurately" In the section 'What to Evaluate" Allen et al (2002), only list the impacts of events.

The concept of project evaluation or evaluation of the management is treated only by the most recent event texts. To some authors, this indicates the lack of maturity of the event industry (O'Toole 2002a; Silvers 2004; Silvers et al 2005).

Summary

PMBOK and event management diverge widely on the management area of marketing. PMBOK encompasses part of marketing in Project Quality management. Event management however includes the quality of the product as well as the project. The event is focussed on to such a degree that the quality of the management is rarely mentioned in event literature. Event Marketing is one of the key knowledge areas and a process that is carried out to align the event with the needs and motivators of the attendees. It is achieved by optimising the variables of the marketing mix of product, promotion, place and price. One of these variables concerns the ability to change the perceptions of the attendees through promotion. The marketing process then is a method to reduce the inherent uncertainty in events. It inputs into all other areas of event management and is a fundamental agent of change and development during the event project life cycle.

Chapter 6 Financial Management

"Events are generally extremely expensive, with high expenditure required over a very short period of time, and there are far higher levels of uncertainty about revenue and profit than there are with the average business" Van Der Wagen (2001, p. 2)

The PMBOK section on project cost management only describes part of the process of event finance. One of the important functions of event management is sourcing, monitoring and reporting on the event finance i.e. revenue or in-kind cost reduction. The incoming finance may not be a fixed entity decided upon or agreed upon during the initiation phase. The event revenue may come from a constant stream such as ticket sales or in sudden spurts due to sponsors joining the event. Figure 6.1 illustrates the financial management process for events.
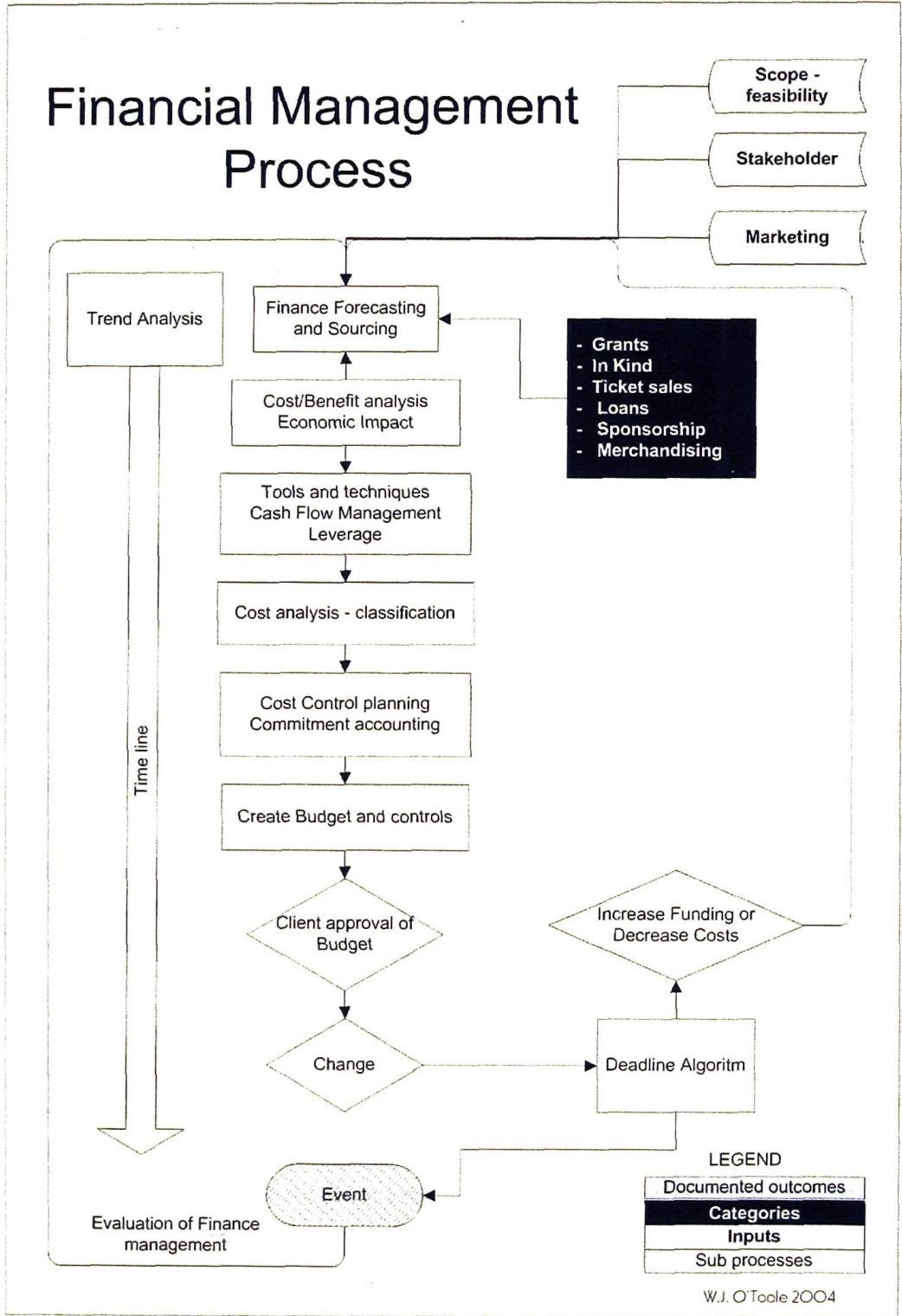
Financial Management Process

Scope - feasibility

Stakeholder

Marketing

Trend Analysis

Finance Forecasting and Sourcing

- Grants
- In Kind
- Ticket sales
- Loans
- Sponsorship
- Merchandising

Cost/Benefit analysis
Economic Impact

Tools and techniques
Cash Flow Management
Leverage

Cost analysis - classification

Cost Control planning
Commitment accounting

Create Budget and controls

Time line

Client approval of Budget

Increase Funding or Decrease Costs

Change

Deadline Algoritm

Event

LEGEND

| Documented outcomes |
| Categories |
| Inputs |
| Sub processes |

Evaluation of Finance management

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Figure 6.1 Financial management process

Revenue

According to the event literature, the sources of revenue are:

- Clients
- Ticket sales
- Selling advertising
- Fundraising
- Sponsorship
- In kind assistance
- Merchandising
- Food and beverage sales at the event
- Government grants
- Broadcasting
- Other onsite revenue such as auctions and competitions.

(Getz 1997; Harris & Allen 2002; Allen et al 2002)

Three of these revenue sources are directly proportional to the number and type of attendance at the event. Most of the others revenue sources are indirectly related to attendance.

In all the events studied for this thesis, revenue and cost reduction was sought during all the phases of the event project cycle. This may includes finance gained after the event has occurred, as part of the shutdown procedure. The uncertainty with the incoming is reflected in the uncertainty with the outgoing, that is, the cost of the event. Income is regarded as a variable by some of the event texts. The term potential income is used and the ability to source revenue from a wide area is described. It is necessary to estimate the income and look for ancillary income (Allen et al 2002). At the same time, the uncertainty means that the event company needs to be constantly aware of methods to reduce costs, should the necessity arise (Allen et al 2002; O'Toole 2003).

The level of uncertainty needs to be established so that a dynamic costing system can be used. Incremental planning, such as that recommended for software projects (Fichman 1999) is one solution to the problem of uncertainty in income.

For some types of events, such as fundraisers, the event itself the sole source of finance. The amount to spend on the event is fluid. The budget is used only as a guide. However the importance of special events in fundraising is indicated by their

cost/benefit ratio of 50%. Note that the benefits have to be estimated so that the scope of the event can reflect the ratio (Smallwood 1977; Baruch College's Nonprofit Management Group 1993). This introduces the concept of value of the event to the participant/attendee. The value of the event to the attendee must reflect the expected common value of the equivalent cost (O'Toole 2003; Sonder 2004). Therefore an increase in the number of attendees means that more of the incoming revenue must be spent on the event experience. The ability to forecast attendee numbers at many events is highly specialised and gives rise to another cause of financial uncertainty. Predicting the number of people that could come to an event is an essential part of revenue and cost estimation (Clark 1997). However, as stated by Wendroff, in describing fundraising events:

"Estimating how many people will contribute to the event can be an insurmountable task for an agency that has never produced a special event; it can involve guesswork even for an agency that holds one every few years." (Wendroff 1999, p. 59)

In such a situation the budget changes are inevitable. As Clarke (1997, p. 29) points out:

"One thing for certain besides rain at events is changes in the initial revenue and expense forecast."

This statement agrees with Goldblatt (2002, p. 120):

" Budget preparation is probably the most challenging part in financial management since the entire preparation is usually based on limited information or assumptions'."

The revenue for some events will depend on the effectiveness of ticket pricing. The price is a variable of the marketing mix, as described in Chapter 5, Marketing. This is a further area of uncertainty as the price of the tickets is difficult to set when the event is unique. The value of the event is not evident until after the event is experienced. This leads to an impossible situation of selling a product that cannot be described as it has not occurred.

Revenue and Resources

Resource planning will relate directly to revenue planning. The uncertainty in the amount and timing of incoming revenue will be reflected in an uncertainty in contracting the suppliers. "Few event managers have the luxury of guaranteed and sustained revenue to fund their events. Most have to work hard to acquire necessary resources and manage them efficiently." (Getz 1997, p. 205). In some cases the event will reduce the need for finance by offsetting cost through in-kind sponsorship.

Sponsors will not be involved in the event until it has reached a level of importance and looks like being a success. Figure 6.2, illustrates the flow-on affect of the inability to estimate attendance numbers.
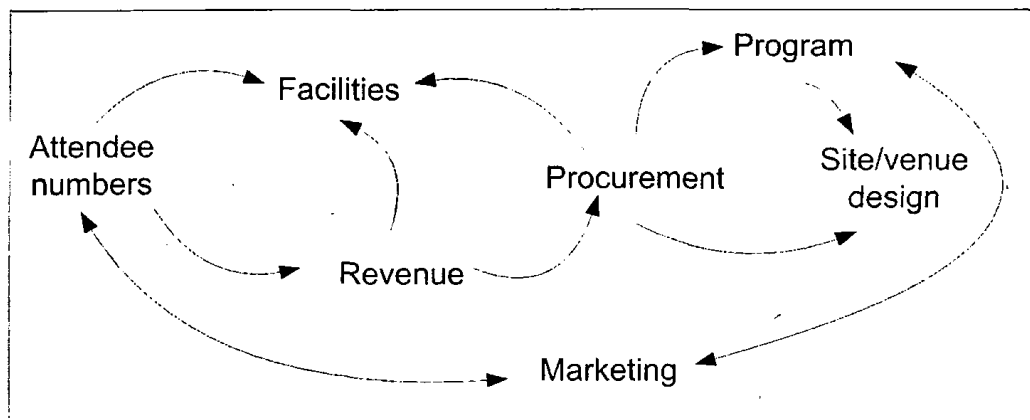

Figure 6.2 Uncertainty arising from attendees

The uncertainty in the number of attendees will create an uncertainty in revenue. This will flow-on to the availability of funds for procurement and what facilities will be used for the event. Procurement uncertainty will affect the program of event and the site layout. The Marketing of the event may need to change to increase audience numbers .

This can be readily illustrated by a statement from the Sydney Olympics. The Olympics is a highly refined event, repeated over many years, with numerous test events and complete government support. Even such a unique event has uncertainly with regard to revenue sources:

"From early 2000, due to declining income projections, it was evident SOCOG would face substantial risks pending the early success of ticketing campaigns. By June 2000, it was evident that underwriting of SOCOG's budget would be necessary if the quality of the Games were to be maintained at the highest level." (Official Report of the XXVII Olympiad 2001, pg001778.htm).

A further area of uncertainty in revenue and cost estimating arises when approximating the work of staff when they are mostly volunteers. Without an extensive training session, such as that provided by the Sydney Olympics, the value of the work by volunteers is difficult to estimate. Also there is a different attitude with regard to finances. As pointed out by Clarke (1997, p. 30):

" Volunteers are usually drawn to an event not to worry about finances. Many leave their financial discretion when they walk into the festival office door. They want to

volunteer their time on projects that are fun and return altruistic benefits to the community."

The event texts recommend a variety of event management strategies to reduce uncertainty in revenue. Such as:

1.   Presales of tickets for public events, pre-registration for conferences, and exhibitions, ticket scaling;

2.   Increasing number of sponsors and levels of sponsorship leverage of current sponsorship;

3.   Alternative on-site sources of revenue such as broadcast rights, merchandising;

4.   Sale of secondary event products, post event auction;

5.   Consolidating all sales;

6.   Event programme sensitivity analysis to identify area of savings;

7.   Well publicised public profile to attract further sponsorship (Watt 1998).
(Catherwood 1992; Graham et al 1995; McCabe et al 2000; Allen et al 2002)

Many texts recommend creating the event budget by listing all the projected costs and then deciding on sources of revenue (Getz 1997;IFEA 1997). Cash flow planning and using breakeven chart is essential in the budgeting (McCabe et al 2000;Van Der Wagen 2001; Allen et al 2002).

Uncertainty in event costs and revenue can result in panic payment. These are regarded as common in the event environment (Van Der Wagen 2001).
Figure 6.3 illustrates a summary of the recommended process of event budgeting through financial management.
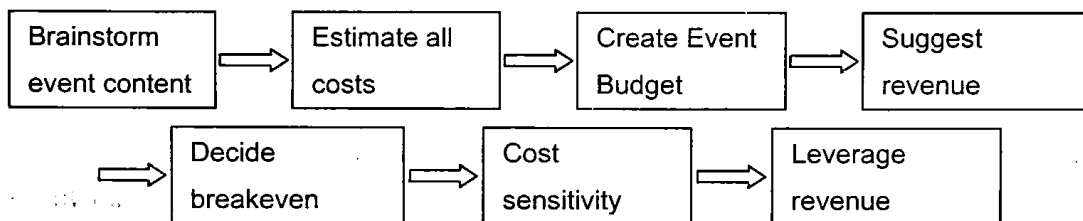

Figure 6.3 Process of budgeting - after Allen et al 2002)

Sponsorship management

Sponsorship is defined by Sonder (2004, p. 416) as:

"A cash or in-kind fee paid to a property (typically in sports, arts, entertainment or causes) in return for access to the exploitable commercial potential associated with that property."

The management of the sponsorship and the relationship between the event and the sponsor is an important part of financial management.

The event texts go into great detail on the techniques to source, develop and manage sponsors. From a project management perspective this is a way to reduce the financial risk associated with the project. The techniques range from distributing the risk, such as seeking a number of sponsors, to cash flow planning (Getz 1997; Allen et al 2002). Setting up levels of sponsorship (Graham et al 1995; Getz 1997; Allen et al 2002) is a recommended strategy for managing the sponsor/event relationship. It can be viewed as a risk management strategy to minimise the event exposure to financial risk.

The management of sponsors will have input from the other areas of event management. In particular the marketing and stakeholder management will significantly interact with the sponsor management. Watt (1998, p. 51) points out: "A well-publicised public profile will often be a crucial factor in obtaining financial support from public and private purposes."

Raising the public profile of the event may be part of the project planning and will be developed while other areas of management are being implemented. The result is that sponsors can commit to the event at anytime. This is a further source of uncertainty in event finance. This aspect of event management is further discussed as part of Stakeholder management in chapter 3.

Cash Flow

The management of the cash flow is an essential skill in event management (Van Der Wagen 2001; Allen et al 2002; O'Toole 2003; Sonder 2004). There may be multiple sources of income and the timing of the payments may be distributed over the life cycle. If the event income is directly dependent on a variable such as the attendees, commitment by sponsors or exhibition space sold, then the beak-even point must be established. Reaching the breakeven point becomes a milestone in the event project. This variability of finance distinguishes the event project from the PMBOK projects.

An important point is made by Van Der Wagen (2001, p. 96) concerning panic payments

" This unusual accounting term is not exclusive to the event industry, but this industry is one in which inflated panic prices are often paid"

The panic payment is an example of the deadline of event ruling the other variables such as cost in the interest of quality.

Cost

Event cost is estimated through quotes and expert judgement. Zero based budgets are common with special events. Estimation becomes more accurate as the event and the scope of work becomes more defined. However initial cost estimates can vary up to plus or minus 50% due to the uniqueness of the resources (O'Toole 2003). Event cost estimation often uses parametric methods such as cost per head for conferences (McCabe et al 2000) or cost per square metre for exhibitions (O'Toole & Mikolaitis 2002). In this way the costs can be directly related to the essential event variable. The variable may also correspond to the event revenue. Thus revenue for a festival will increase with ticket sales, as will the cost.

Cost planning uses cost classification as a method of predicting, monitoring and controlling costs. Event costs are divided into Direct or Indirect, Unique or Standard, Fixed or Variable, Onetime or Recurring. This classification will also indicate the degree of uncertainty in the estimate of the costs.

Due to the fixed deadline and possible changes in scope, the time of estimating will make a difference to the degree of accuracy of cost estimate (O'Toole 2003). This is furhter source of uncertainty for the management of an event.

A cost found in the event management and not found in PMBOK is the cost of marketing. This can be a significant cost if part of marketing is to source sponsorship. Shone's comments (2001, p. 171) are worth quoting at length, as he makes a number of important points:

"Some commentators suggest that events need to have quite a substantial marketing budget compared to normal kinds of products, perhaps as much as 10 percent of the total event expenditure, as opposed to 3-4 percent for most other goods and services, because of their short duration and unique profiles compared to other types of goods and services, which are much longer lived. Of all the marketing planning activities, the marketing schedule is the one most likely to surprise people new to the job. The lead times for preparing some marketing activities can be shockingly long."

Impacts

The intangible results of an event, such as marketing, raising awareness of issues, cultural enhancement and political impacts, can mean that the financial aspects of the event are secondary to these results. That is – the money can always be found. Hence the strategic objectives of the event can have significant influence on the more measurable cost and income of the event. This is reflected in the term triple bottom line. As mentioned elsewhere in this thesis, such intangibles can result in a complex and uncertain event management environment.

As Shone (2001, p. 171) points out:
"In the events business, there may be some types of events whose purpose is indeed to make a profit, but we should be careful not to generalize about profit. Perhaps we could more legitimately say that events are about creating wealth - wealth of experiences, wealth in socialization, wealth in community spirit - but profit is too limited a concept."

Summary

The event project significantly differs from the PMBOK in this area of knowledge. Cost management is an integral part of finance management for events. Many events are uncertain of their income. This uncertainty of income results in an uncertainty in costs and flows into all other areas of the event. For this reason, sponsorship management is a major part of all texts on event management. By employing sophisticated techniques in developing and managing the sponsors such as levels of sponsorship, the event reduces its financial risk. The event can find revenue in a variety of ways. This can occur prior to, during and after the event. Such a system is very different to the model proposed in PMBOK 2000.

Chapter 7 Time Management

"This is the primary difference between event project management and other realms of project management. The event's date, which is virtually fixed, not flexible is the starting point of project time management, rather than the project management process determining the completion date. Time restrictions will determine the tempo of the event project." (Silvers 2004, p. 39)

PMBOK describes time management as the tools and techniques of identification of activities and their optimal sequencing to produce and control the project schedule. Substantially, this aspect of event management, as evidenced by the texts, literature and primary documents, is the same. Time management is embedded in all other areas of management and is rarely mentioned as a separate function of event management. The management of time for events is one of emphasis and priority of using the tools and techniques described in PMBOK in a dynamic and uncertain setting. The scheduling of an event includes what occurs at the event in the form of the event program, and the production of the program. The later is represented by the production schedule comprising the supporting activities of the program, such as the catering, audiovisual and security.

Goldblatt (2002, p. 101) describes time management as being the difference between success and failure:

"Your return on your event investment is in direct proportion to your ability to manage your time efficiently and meet various deadlines"

In their study of 14 events in the entrainment industry the project managers Hartman, F Ashrafi, R. & Jergeas, G. (1998, p. 273) remark:

"The live entertainment industry consistently delivers projects on time. Their overall commercial success is better that some traditional project management oriented industries, for example construction, which has a higher bankruptcy and litigation rate"

Their conclusion is that there are strengths in the live entertainment industry that contribute to their timeliness. These include: that the completion is clearly defined;

creativity is embraced; there is an "espirit de corps" in the event organisation and there was 'comfort' with risk and uncertainty.

Most of these strengths are intangible qualities that may be described as the culture of the project management company.

The fact of the immoveable deadline means that the planning process must begin by setting date of the event and work backwards to establish the timelines (Levy & Marion 1997; O'Toole & Mikolaitis 2002; Silvers 2004).

The complexity of such formal task and time analysis lead the Los Angeles Olympics to revert to weekly meeting rather than use formal schedules (Bowdin et al 2001).

Figure 7.1 illustrates the time management process used in management of events.
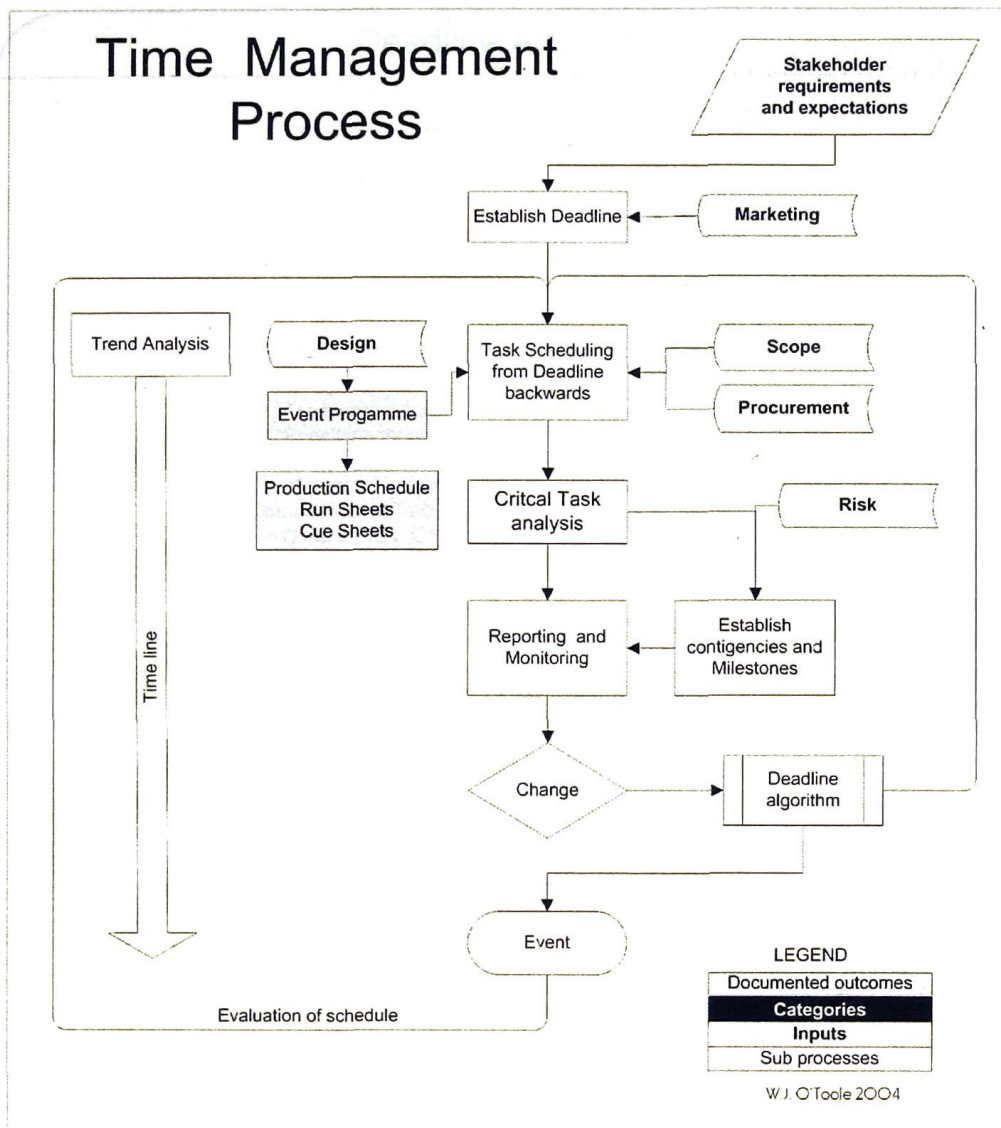
Figure 7.1 Time management process

The input to the process is from the Stakeholder requirements, in particular, the client and the attendee expectations. Marketing will assist in the decision on the deadline i.e. the date of the event. The scheduling of the tasks will be initially determined by the design of the event in particular the content of the event. There are inputs from the Scope and Procurement processes. The tasks will be scheduled back from the date of the event. Critical tasks are identified by combination of the inputs from Scope and Procurement with input from the Risk process. The Risk process will assist establishing the milestones and the time contingency such as buffers. When the changes occur, they will be assessed by the deadline algorithm as illustrated in Figure 7.2. Time management is performed over time and will be influenced by the external and internal trends in the other areas of the event management.
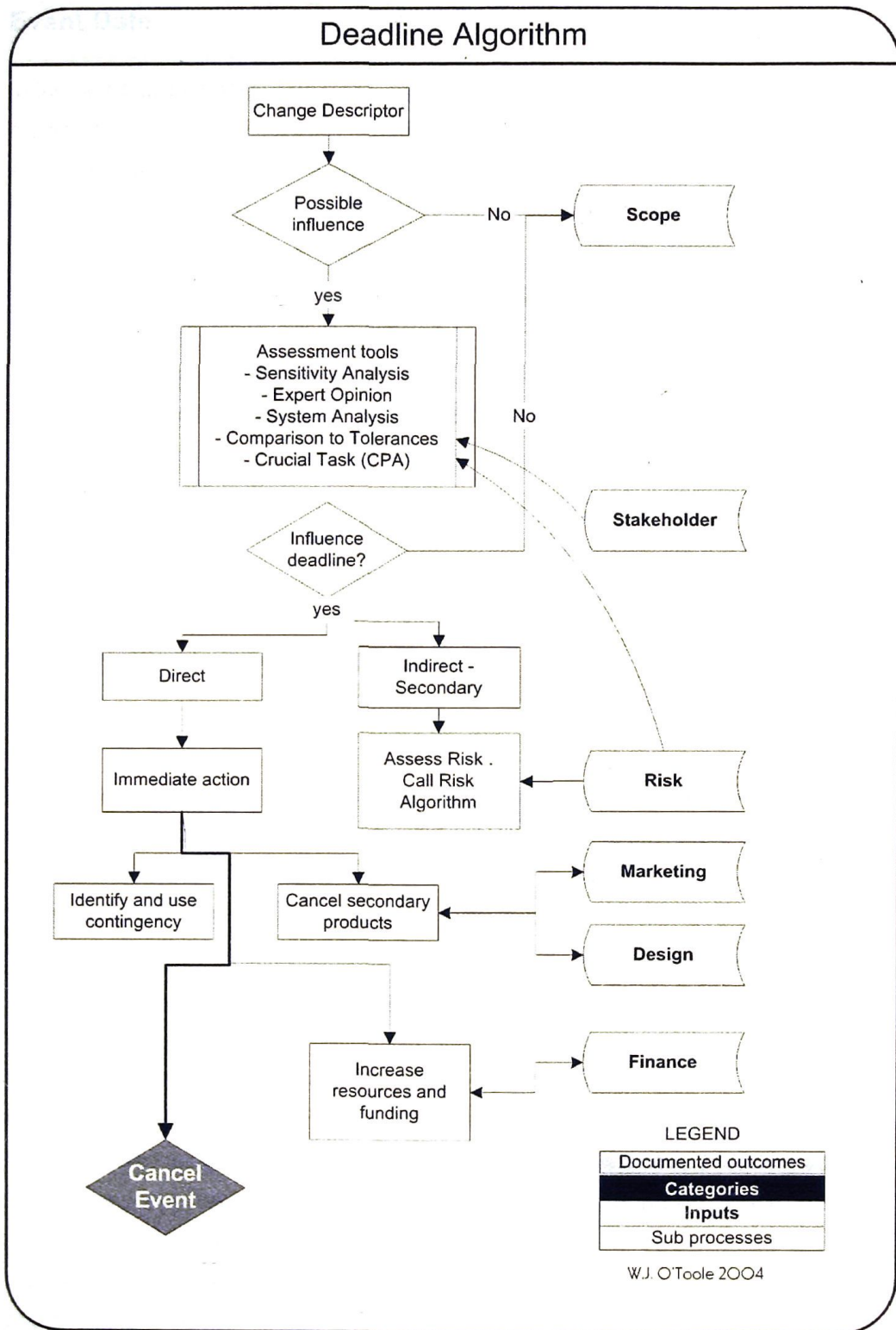
Figure 7.2 Deadline algorithm

Event Date

In the strategic planning of an event or festival the choice of the date of the event is crucial to its success (Getz 1997; Allen et al 2002). In particular, the time of year for events whose objectives are to attract tourists to a region, needs to be carefully thought out to maximise its impact. The decision to stage an event in either *off-peak* or *on-peak* tourism season is regarded by some authors as crucial to its success (Tonge 2000). For most ceremonies and anniversary events, such as New Years Eve, the date will already be decided by tradition. For corporate events, such as conferences, award nights and exhibitions, the date must be chosen to optimise its commercial objectives. McCabe et al (2000) mention that there is a peak in the number of conferences during the May and June in Australia due to the date's nearness to the end of the financial year.

Hence the date of the event is generally discussed and confirmed during the initiation phase of the event project life cycle or the decision is outside of the event management process. Once it is decided, the date of the event henceforth becomes a fixed constraint on the management process.

Deliverables

The deliverables of the time management process are the schedules, runs sheets and planning programs. These can be divided according to the phase of the event project. The most common term used is the "timeline" (Malouf 1999; Goldblatt 2002). The timeline represents the planning and implementation phases of the event project. Constructing a timeline is done by deciding on key dates and optimising the lead times.

Shone (2001, p. 171) emphasises the ability to identify the "lead time": First concern is

"Of all the marketing planning activities, the marketing schedule is the one most likely to surprise people new to the job. The lead times for preparing some marketing activities can be shockingly long."

Reading this quote in the light of the work of Sterman (2000) on dynamic systems and delay, illustrate a fundamental contribution to uncertainty. The identification of a lead time is an attempt to manage the work flow delay and therefore manage the inherent uncertainty.

A number of event texts and the event manuals include a sample of a timeline or a suggested timeline for the planning of events (Community Festival Handbook 1991; Coons 1999; Malouf 1999). The event stakeholders publish sample timelines and include the lead times or key dates that must be met (Major and Special Events Planning: A Guide for Promoters and Councils 1997; Edgecombe 1999; Road and Traffic Authority 1999; A Planning Guide for Event Managers 1999; Government of Victoria 2004). The event stakeholders represented by these manuals include the local council, police, roads authority, state government and the event site operations staff.

The highly coupled software scheduling system, such as project management software, is not recommended by any of the event texts. Scheduling software has a major limitation in that it cannot respond to rapid changes in its linked resources (O'Toole 2003). The scheduling software used by the Sydney Olympics was transferred into a more familiar system for the staff (Allen et al 2002). Gantt Charts, PERT Charts and Critical Path Analysis are recommended in a simpler form than is found in software packages. All the software programs are assessed in terms of their ability to change within the constraints of a deadline (O'Toole 2003; Silvers 2004).

The other deliverables of time management are the schedules for staging the event. They include:

- Program – this is described in the Chapter 4 Design
- Production schedule
- Run sheets
- Cue sheets (Allen et al 2002; Malouf 1999; O'Toole 2003)

These are an output of the sub-process of staging in event design. They are not described in PMBOK. Unlike the event planning timeline, the staging schedules are often critical down to the minute (Allen et al 2002; Silvers 2004). They are used to coordinate the program on the day of the event and involve a number of key contractors, such as the media broadcast company and the fireworks suppliers.

The production schedule for some events may include the tasks and times for the preparation of the venue or site. In this sense, the production schedule is employed as an operations manual. The complexity of tasks and times on the day of the event is illustrated by the system recommended by Sonder (2004, p.123), when explaining how to decide on the preparation time:

" Subtract the time a task takes to accomplish from that time it needs to be finished to determine the time it should start. Then factor in other conflicting activities and adjust the schedule accordingly. Submit the schedule to all relevant parties and adjust as

needed. Repeat this process until consensus is achieved. All involved should feel that they have sufficient time to complete their tasks in a manner that does justice to their skills and experience."

In this quote Sonder is recommends to the event manager that they work backward from the deadline, use quality control, allow expert opinion and, at the same time, enhance the work as a team.

Deadline Management

The delivery of the event on time is the major priority and every aspect of the event management process is assessed according to its possible affect on the deadline. Each of the processes that are described in this thesis must undergo assessment according to the deadline. It is a simple algorithm as illustrated by figure 7.2. Figure 7.3 contains an explanation of the algorithm.

Figure 7.3. Terms used in Figure 7.2

Change Descriptor

The change can be internal or external. The descriptor must contain its sources as well as an exact description.

Will it influence the deadline?

This decision may not be obvious at first and therefore may be a draft decision until the next stage is used.

No

Many changes will be a matter of adjusting aspects of the event and therefore adjusting the scope. They may not have any bearing on the event deadline.

Yes

Initially accepting that the change will impinge on the deadline.

Assessment tools

These are a number of techniques to assess the consequence of the change and the strategy required to management it. These include:

- **Sensitivity analysis** - testing the affect on the event by a small change in a parameter.

- **Expert Opinion** - using the experience of event experts .The dynamic and unique nature of many events and the immaturity of the industry give value to experience in previous similar events..

- **Systems Analysis** - the interconnected nature of event management means that the tools of systems analysis such as fault trees and flow diagrams can be employed.

- **Crucial tasks and the CPA** - the critical, or more correctly crucial, tasks will be affected by any change.

Comparison to Tolerances - the tolerance of the stakeholders will be a significant part of the assessment of the change.

Direct - the change will have a direct influence on the deadline.

Indirect - the change will have a flow-on to the deadline. The strategy to deal with this comes from the risk management process.

Immediate action - the assessment calls for action to manage the change.

Identify and employ contingency - the assessment calls for the implementation of a contingency plan. This is occurs when the change was expected and allowed for in the risk management planning.

Cancel Event - the extreme solution to the change. Cancelling would require a variety of further tasks and is part of contingency planning arising from the risk management process.

Cancel secondary products - sections of the event are cancelled to allow to continuation of the main product. This will have implications on Event Design and the Marketing of the event. Also there would be inputs form the Marketing in order to make the best decision on what parts of the event to cancel.

Extra resources/finance- extra resources area engaged to deal with the change. This is a common solution to changes and is a characteristic of the dynamic nature of event management.

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The time overruns experienced in other projects, such as the 30 % of time over runs in software projects (Standish Report 1995, 2004), is an impossible situation for

event management. The fact of that the event must occur at the scheduled date is so implanted in event management that only the recent event texts mention it.

Summary

The process and tools and techniques described in PMBOK are necessary but not sufficient to describe the time management for events. The major difference is that the date of the event is fixed and the planning must work backwards from the event date. This becomes the ultimate deadline that must be taken into account by all decisions made during the event project. The time management during the event which involves tightly scheduled activities with little buffer time, is not covered by PMBOK 2000.

Chapter 8 Risk Management

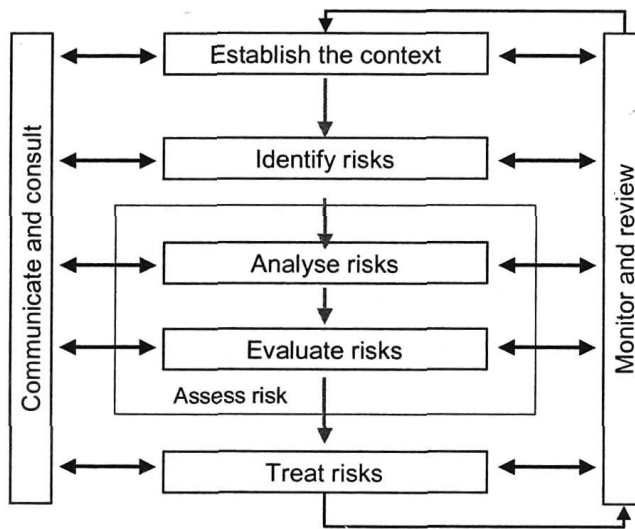The PMBOK process of risk management is summarised by Figure 8.1.

Figure 8.1 Source AS/NSZ 4360:1999, O'Toole (2003) – reproduced with permission

Unlike most of the areas of knowledge described in PMBOK, the risk management is a cross functional process, that is applied to all the other knowledge areas.
An important statement in the PMBOK (2000, p. 27) for the content of this chapter is:
"Project risk includes both threats to the project's objectives and opportunities to improve on those objectives. It has its origins in the uncertainty that is present in all projects. Known risks are those that have been identified and analysed, and it may be possible to plan for them. Unknown risks cannot be managed, although project managers may address them by applying a general contingency based on past experience with similar projects."

This quote illustrates the limitations in the ability to directly apply the PMBOK risk management model to events. These include:
- Measuring the risk against project objectives. Events are multi-objective. Many of these objectives are intangible and varying over the event project life
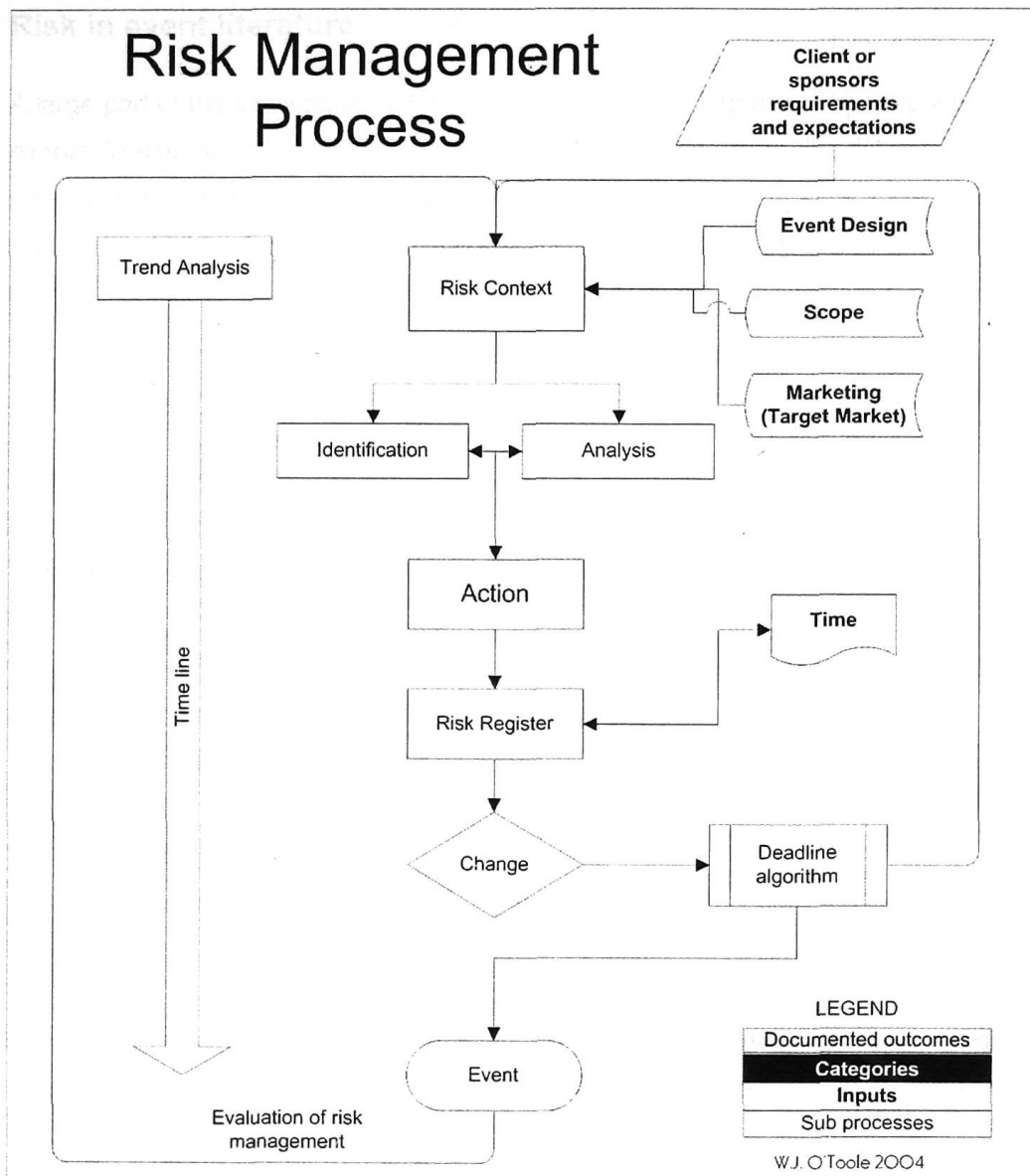
cycle in response to external and internal developments. As set out in Chapter 4 Design of this thesis, the qualities of surprise and the unexpected are an essential part of the event experience.

- In a complex environment, the ability to predict is severely limited. Therefore the unknown risks, those that cannot be managed in the PMBOK sense, are more common.

- The risk management process takes time and therefore is subject to the time constraints under a deadline. In such a situation, the risks must be highly prioritised. In a dynamic system with uncertainty that characterises event management, this is a major risk in itself.

The application of the model for event management is recognised by all the recent event texts (O'Toole & Mikolaitis 2002; Harris & Allen 2002; Goldblatt 2002; Tarlow 2002; Silvers 2004; Allen et al 2005). Many of the earlier texts tend to characterise risk management as useful in specific areas of event management such as:

- Safety on site and Occupational Health and Safety (OHS) issues (Tonge 2000; Department of Tourism Sport and Racing 1999)

- Financial (Catherwood et al 1992; Getz 1997)

- Legal (McCabe et al 2000).

This is further proof of the lack of identification of the fundamental management process in event management literature. The outstanding exception is Berlonghi who comprehensively described the process and its application to all areas of event management (Berlonghi 1990). Each of the modern texts refers to Berlonghi's work. Figure 8.2 illustrates the risk management process as applied to events.

Risk Management Process

Client or sponsors requirements and expectations

Trend Analysis

Event Design

Risk Context

Scope

Marketing (Target Market)

Identification ◄─► Analysis

Action

Time

Risk Register

Time line

Change

Deadline algorithm

LEGEND

| Documented outcomes |
| **Categories** |
| Inputs |
| Sub processes |

Event

Evaluation of risk management

W.J. O'Toole 2004

Figure 8.2. Risk management process

This figure is substantially the same as the figure in the Australian Standards. Figure 8.1 is a representation of the PMBOK process. The major difference is:

The inputs and outputs to other event management processes and knowledge areas. In particular the areas of Marketing, Scope and Design

- The introduction of internal change as an integral part of the risk management process and external change in terms of trends

- The introduction of the deadline as a major constraint on the process.

Risk in event literature

A large part of the sections on risk management describe the common risks found at events. These may be termed staging or event operational risks. The risks to the project, that is the process of management, are only covered in a small number of recent event texts. According to O'Toole & Mikolaitis (2002), Allen et al (2002), the special circumstances of an event give rise to risks unique to the industry. These include:

Crowds

Volunteers

New venues/sites

Attractions that appear risky

Untried combinations of vendors

Media

The area of concern for risk management in the various event texts is the risk to the attendees. These are:

1. Unfamiliarity - environment, site, staff
2. Crowds
3. Logistics - movement
4. Temporary structures
5. Security (EMA 1999)

Each type of event, such as festivals, exhibitions and conferences, will have further risks associated with the industry. As headings for sports event risk, Graham (1995) lists:

- Athlete protection
- Loss prevention
- Storage
- Access to events -such as credentialing
- Hiring and training staff
- Transporting goods
- Safety
- Insurance

These lists are a mixture of risk origin (the area of event management), and risk action description. The granularity or fineness of the description of the risk management is not described. This gives rise to the question of when to stop the risk

management. There is no concept that the event has a deadline and therefore the risk management has to have a level where it stops. The recently released Australian Standard (Standards Australia International (2004, p. 58) recognises this limitation of the process outlined in Figure 8.1:

"… it is important to strike a balance between the effort required to obtain further information and the value of the information to the decision process. Consultation and communication may help to determine which aspects of uncertainty require greatest effort. In some circumstances it will not be possible to obtain further information, or ignorance may mean that uncertainty cannot be resolved."

Within the event management environment, the timeliness of the risk analysis and the mitigation strategies has to be taken into account.

The risks are categorised by origin or effect. However it is recognised that, in a dynamic system such as event management, the risks can cascade (Parry 2003) and may require various tools to find their origin, Fault tables and Ishikawa diagrams (O'Toole & Mikolaitis 2002; Parry 2003; Silvers 2004) are recommended to assist this process. The speciality of events such as their purposeful uncertainty and the event uniqueness, leads some authors to recommended wide consultation as a means to identify risk and ensure the staff understand the importance of risk management (Hatton 2000; O'Toole & Mikolaitis 2002; Business Excellence Australia 2003).

Most of the above represent areas of uncertainty that arise out of unfamiliarity of a new configuration of suppliers, attendees, staff and site. These can be regarded as the variables on which the event management acts. There is little written on the risk involved in the event management process.

Problems, as perceived at the event itself, may be a symptom of hidden management problems O'Toole (2003b, p.1) illustrates the limitation of only analysing risks at the event:

"A description of event operations often concerns only the most immediate aspects of it such as the food, waste, toilets and pathways. Because the operations are physically evident at the event, they can easily distract from the real issues. They are the outcome of a process. In most cases their success or failure will depend on the effectiveness this process - the planning and ongoing management. In other words, they should be seen as the visible result of event management. When there is a

problem at an event this most often is a symptom or an outcome of a management process. Each aspect of event operation can be traced back to the management system."

It is important to point out that the superficial response to this cluster of risks would be to reduce the unfamiliarity of the configuration. However a basic objective of events is the presentation of novelty (Malouf 1999; Allen et al 2002). Different authors express this novelty as the "Wow factor" (Allen et al 2002), the "Reveal", changing the attendee's attitudes or serendipity. The novelty is one of the intangibles and, therefore, immeasurable outcomes of the event management process. Hence the solution of running the event to test the system would not allow the event to meet its primary objective.

Summarised as a qualitative model, event uncertainty can be expressed as a function of variables volunteer competency, novelty or newness of the event, stakeholder objectives, event management competency and the ability to measure event outcomes (intangibility). Each of these characteristics may be related to the other variables. The ability to define and sustain the stakeholder objectives can be related to the ability to measure the event outcomes. To be able to measure this successfully would require data that is currently unavailable.

Attendees

The other characteristic of the risks listed above is that they concern the attendees. The liability of safety issues is large and ever-present in all the event literature that deals with risk (Tatrai 2001; Tarlow 2002). The attendees will be the origin of primary and secondary (or flow on) risk. If some of the risks eventuate it will result in intervention of outside agencies - such as police or emergency service - and remove the authority of the event from the event management (Davies n.d.) Therefore the consequence of risks to the attendees is extreme.

This is not covered specifically in the PMBOK. Using the PMBOK model of risk assessment would involve measuring the objectives of the stakeholders , i.e. the attendees against the expected outcomes. However, not only are their numerous attendees, their objectives are many, varied and difficult, if not impossible, to measure. For example some events such as extreme sports, are meant to be risky (Office of Sport and Recreation Tasmania 1999).

All the event risk management documents such as the risk management plans, used to validate this thesis have the risk to the attendees as their primary concern (Symonds Group Ltd 1999; Hatton 2000; Tatrai 2001b; Avert Risk Management 2001; NSW Premiers Department 2001; Perkins 2001). The legal decisions and legislations that have substantially affected event management has arisen from disasters at events. The 1998 Sydney to Hobart Yacht race (State Coroner 2000), the inquest into the Death of Jessica Malik (Milledge 2002) have had lasting affects on event management in Australia. The stampede at Ellis Park stadium in Johannesburg in 2001 lead to wide ranging changes in national legislations for events (Ellis Park Stadium Disaster 2001). Many of these disasters are, at the time of writing (December 2004), still in the courts. The charge of Criminal Nuisance against the event manager of the Le Race 2001 cycle race in New Zealand is still being contested (O'Toole 2003a). The West Warwick club fire in February in the USA is under investigation as to the affect on event management.

Qualitative risk assessment

A number of factors mitigate against the comprehensive use of quantitative methods of risk assessment for events. Parry (2003) illustrates the "poverty of quantification" by comparing the reassessment of insurance that results from disasters. In particular, the appearance of accuracy may diminish the risk awareness of the organisation through misplaced confidence. This is further stressed in the latest edition of the Australian and New Zealand Standard on Risk Management (2004, p. 58):
"The availability of simple-to-use software tools can give the appearance of robust analysis of uncertainty even where the underlying logic is flawed."
Parry (2003) comments on the importance of the business environment and the risk philosophy of the organisation in the interpretation of risk. He emphasises that the risk awareness of the organisation is essential to each phase of the risk management process. The centrality of risk awareness is stressed by many of the texts. Risk awareness is not treated by PMBOK, although a case could be made that the chapter in PMBOK is part of the risk awareness. The risk assessment meeting is essential in the risk management process (Berlonghi 1990; Goldblatt 2002; Allen et al 2002). There are three functions of a risk assessment meeting:
1.   Empower the staff and volunteers to take responsibility
2.   Employ the combined expertise to identify risks
3.   Demonstrate the duty of care (Graham 1995)
The first two of these concern raising the risk awareness of the event team.

Due to the nature of events in that they deal with crowds, emergency management is an important part of any risk management process. EMA (1999) contains a chapter on the psychological dimension of any risk situation. The secondary risk can create greater loss than the primary risk. This is closely linked to the risk awareness of the event team.

A number of the primary event documents used for this thesis illustrate that scenario development or table top exercises are used in preference to, or to validate the application of, the Australian Standards approach to the unique situation at events (NSW Premiers Department November 2001; Table Top Exercise Major Event 20.11.01 Responses To Scenarios 2001; Business Excellence Australia 2003). The table top exercise used by the Office of Protocol and Special Events or the NSW Premiers Department originate from the methodology used by the armed forces and disaster management organizations such as Emergency Management Australia (EMA1999; EMA 2000). These exercises concern disasters at large events where the responsibility is complex due to the involvement of multi-agencies such as Police, Roads and Transport Authorities

Summary

The model presented in the PMBOK represents risk management in a more stable and certain management environment than is found in most event management. The need to reduce the uncertainty is in opposition to these three fundamental characteristics of event management:
1.   serendipity or surprise that is part of the definition of the word 'event';
2.   inability to fix (freeze) the stakeholder requirements over the event project life cycle;
3.   intangible nature of the asset itself – the event – and its future effects.
The crowds at events require a special risk management process that is not described in PMBOK. All the event literature, when dealing with risk, has crowd management as a major priority. However, with some notable exceptions, the event literature does not describe the generic process of risk management. The literature predominately describes specific risks at the event and ignores the generic risk management process. It does describe the fundamental cross-functional process that applies throughout the phases of the event project.

Chapter 9 Communication

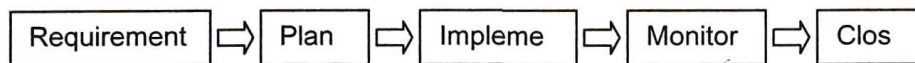The PMBOK 2000 section on project communication follows its general model shown in Figure 9.1.

| Requirement | $\Rightarrow$ | Plan | $\Rightarrow$ | Impleme | $\Rightarrow$ | Monitor | $\Rightarrow$ | Clos |

Figure 9.1 Simplified PMBOK process

Within this process are a number of feedback loops to refine the applicability of the model. This chapter will demonstrate that this model, with the tools and techniques summarised by PMBOK, is necessary but not sufficient to represent event management communication. The PMBOK process is performed under the three conditions of the event environment, as evidenced by the current texts and the case studies:

1.   Deadline
2   Complexity
3   Uncertainty

As presented in the various event texts (Getz 1997; Allen et al 2002 ; Goldblatt 2002; Malouf 2002; Silvers 2004; Sonder 2004) the communications involved in event management can be categorised as shown in Figure 9.2.

Figure 9.2 Categories of event management communication

- Internal Staff – including:
    - o   Documentation/Office
    - o   Administration Manual
    - o   IT system
- Internal Volunteers – including:
    - o   Meetings, briefings
- Internal - during event including:
    - o   Onsite Communication systems
    - o   Operation manual

- External - stakeholders including:
  - o Progress Reporting such as legal requirements
  - o Promoting (audience)
  - o Development (sponsors)

As well as these formal means and processes of communication there are informal means of communication made up of social networks. This is dealt with elsewhere in this thesis. The informal communication channels provide mutual understanding, a common language and shared experience that are important in team development (Drucker 1974). These points were made in the early texts on management. Oral communication also provides an explanation of formal communication. It places the formal communication into context and clarifies issues. This is missing from many aspects of formal communication such as reports, and templates (Mintzberg 1994).

Of the event communication categories list in Figure 9.2, Promotion, Stakeholder Development and Onsite communication are not covered in the PMBOK.

Hartman et al (1998, p. 277) recommend that "all parties have to be involved from the definition phase onward in order to assure proper communication in project teams during all phases of the project life cycle." However there is no reason given for this, which is particularly surprising as all the events used in the study were a success. The general term "all parties" does not give any limit on the stakeholders that are included. As shown in the chapter 3 of this thesis, the number of stakeholders can easily exceed one hundred. It is a physical impossibility to include them. The buy-in or including all parties in the decision making is a common suggested solution to management problems. However there are many problems with including all the stakeholders in every phase. It needs to be traded off against the risk that may arise, such as the conflict of stakeholder requirements, as well as its affect on the deadline. New stakeholders will be introduced as the event project progresses though its phases. In particular, sponsors and the audience will, ideally, increase as the event nears. Having all parties "involved from the definition phase" is impossible for many types of events.

Event manuals

The use of a manual in event management is stressed by a number of authors (O'Toole & Mikolaitis 2002; Silvers 2004). A sample of actual manuals are used as

evidence of the management system by this thesis (See Bibliography for a list of the manuals used in this thesis). Event manuals can be of various types. Due to the transitory nature of events, they do not correspond to the operation or procedural manuals recommended by the International Organization for Standardization ISO (Seddon 2000). These types of manuals commonly used in events are not described by PMBOK.

The manual is an important communication medium and different types are used extensively in events. The manuals can be categorised into:
- Master Event manual
- Report manual
- Operation/production manual
- Staff manual

The relevance of the information in the manual is time dependent (O'Toole & Mikolaitis 2002). Therefore the manuals applicability is deadline dependent. For some of the types of manuals, their life is over once the event has finished. This has lead some authors to suggest the use of a template system for event manuals (O'Toole & Mikolaitis 2002; Silvers 2004).

The event environment characterised by the deadline, complexity and uncertainty, has been compared to the military environment when conducting a campaign (Allen et al 2002). In such a situation of change, the concept of information inertia is useful to describe the characteristic of information's resistance to move in complex environments.(Sterman 2000; Tolle 2002). Factors that contribute to the lack of dissemination of relevant information are:
- Number of people or work units (teams) and related to the organisation structure set up for the event
- The staff/contractor experience in events
- Staff's and subcontractors ability to work together
- The communication technology available and the staffs/contractors competence
- The number of communication channels and their network ability
- The information's relevance and interconnectedness.

All of these factors contribute to the delay in the relevant application of information. As Sterman (2000) has demonstrated, delay significantly contributes to uncertainty in a dynamic system.

Tools

Checklists, as they are easily created and common to most work cultures, are used as the most prolific form of management communication tool (Malouf 1999; Coons 1999; Harris & Allen 2001; Allen et al 2002; O'Toole & Mikolaitis 2002). All the listed event manuals contain checklists (see Bibliography). The characteristics of the checklist are:

1.   They represent the combined experience and knowledge of the event team
2.   The checklist is the final output of the work breakdown structure and therefore is a tool of management integration
3.   They can represent mini milestones
4.   A checklist is easy to read by staff and volunteers
5.   They can be adapted to future events
6.   They are quick and simple to create
7.   They can be used in a variety of communication channels - paper and web (O'Toole & Mikolaitis 2002)

The checklist is a solution to the problem of 'information inertia' outlined above. Although most of the event texts have checklist for various areas of event management, few mention their use as a management tool.

The emphasis is on the flexibility of the checklist. It therefore solves the problem of project documentation being quickly out of date as the event internal and external environment changes.

External Communication - Promotion

Promotion contains two dimensions:

1.   Communicating information to the major stakeholders in the event - in particular the attendees.
2.   Creating a favourable image of the event to influence stakeholder's decisions. In particular, manipulating the buying choice of the target market. (Getz 1997; Allen et al 2002).

As stated by Van Der Wagen (2001, p. 69):

"As part of the marketing strategy, event promotion involves communicating the image and content of the event program to the potential audience. Broadly speaking the aim of the promotional strategy is to ensure that the consumer makes a decision to purchase and follows up with the action of actually making the purchase. It is essential to turn intention into action and this is often the biggest obstacle of a promotional campaign."

Point 2 can also be interpreted as advancing sales (Bowdin et al 2001). However this applies to events that depend on sales for their funding. Promotion can also be part of the cross promotion for the sponsor, when the event is used as a tool of marketing (Jackson et al 1990; Geldhard et al 1996; Getz 1997).

The effectiveness of promotion is a result of optimising the allocation of resources to the variables in the communication mix (Getz 1997). These variables are:
- Advertising
- Sales and personal selling
- Public Relations
- Cross promotions
- Direct marketing and Invitations
- Street promotions

(McCabe 2000; Goldblatt 2002; Allen et al 2002 ;)

The inputs to the event promotion come from the marketing function.
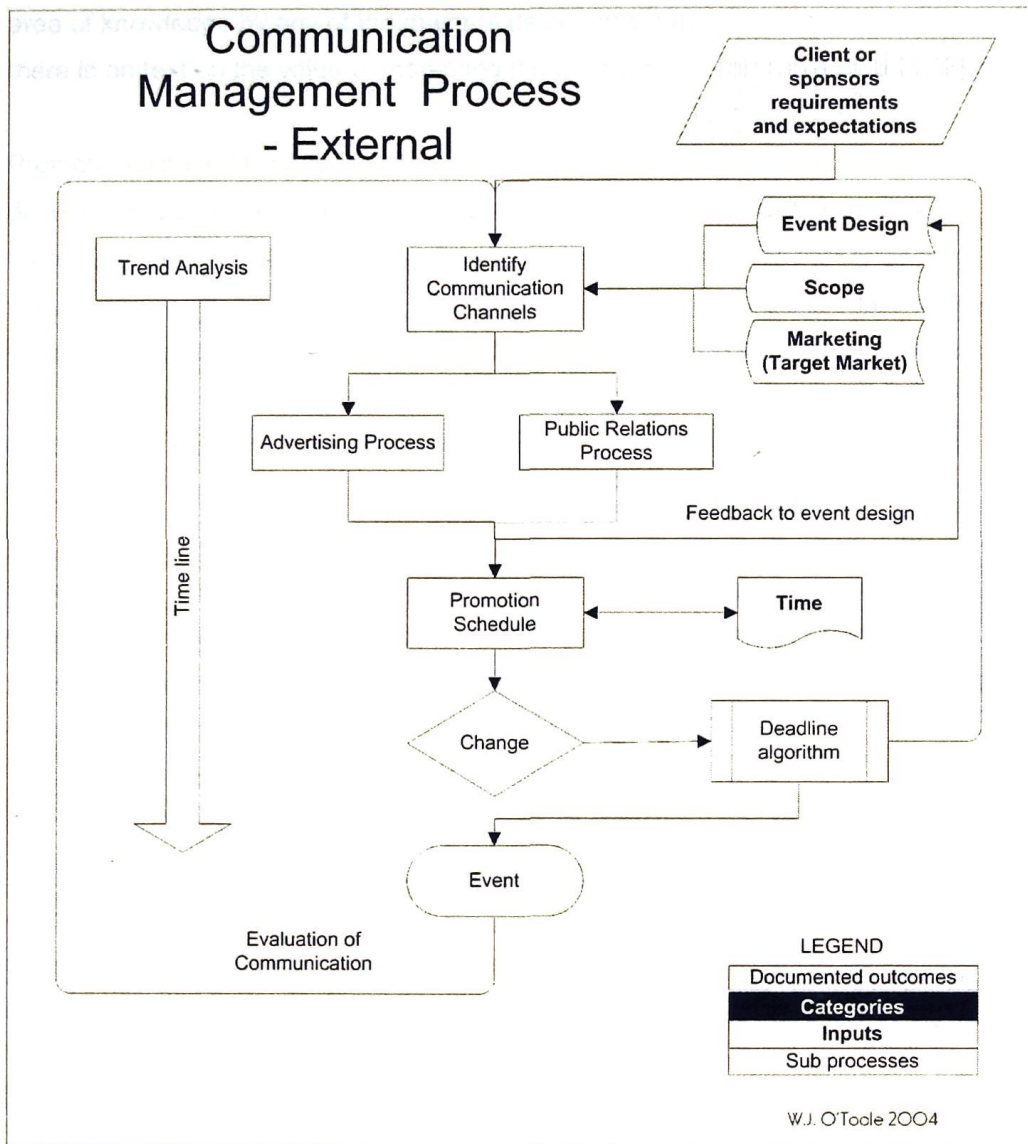The tools and techniques used include:
- Constructing a Press campaign
- Media kit
- Press release

(Tonge 2000)
The external communication process is illustrated in Figure 9.3.

Communication Management Process - External

Client or sponsors requirements and expectations

Trend Analysis

Identify Communication Channels

Event Design

Scope

Marketing (Target Market)

Advertising Process

Public Relations Process

Feedback to event design

Time line

Promotion Schedule

Time

Change

Deadline algorithm

Event

Evaluation of Communication

LEGEND
Documented outcomes
Categories
Inputs
Sub processes

W.J. O'Toole 2004

Figure 9.3. External Communication management

The promotion of the event needs to be flexible so that it can take advantage of opportunities. Whereas the advertising variable of the promotion, or communication (Van Der Wagen 2000) mix can be planned with set media deadlines, the public relations (PR) campaign has to look for opportunities provided by occurrences outside the control of the event management. The PR, therefore, is inherently uncertain.

It is within the promotion element of an event that a major discrepancy of PMBOK and event practice is found. Marketing, including promotion, is not regarded as an

area of knowledge by any of the major texts on project management. Of interest, there is on text on the value of marketing the project proposal (Cova et al 2002).

Promotion also will feed back to the event design thereby assisting in the development of the event product. As pointed out by Lloyd (1997), the event manager must assist the media by developing visual opportunities for impact on television. Allen et al (2002) discusses the way the media can disrupt the live event through broadcasting. However they both agree that the involvement of the media can make large changes to the financial management. Also, in many events, the media do not make an early commitment to an event. In this situation the media become another source of uncertainly for the management of the event.

An input into the Marketing function of the event is the projected attendance numbers. As the event finance will depend on the size and composition of the potential audience, the promotion campaign must be able to respond to the need for more or less promotion, or a change in the promotional message.

The promotion campaign for a public festival or events is tightly coupled to the other event plans. It is an example of event management integration being embedded in each of the processes of event management . As outlined in the Sydney Olympic Official Report :

"SOCOG's communication and community relations strategy, supported by its media strategy, was initially focussed on informing and inspiring Australians to embrace Olympism and to further build support for the Games. These activities were linked closely with the Marketing and Sponsorship Program and also with specific campaigns relating to Volunteer Recruitment, the torch relay and, eventually, ticket marketing." (pg001505.htm)

Promotion (called "Delivering the Message" in the SOCOG documents) , therefore will directly and immediately affect Marketing, Finance, Stakeholder Management and Human Resource planning.

Onsite communications (OSC)

All the event handbooks and event operations manual contain a section on onsite communication. This can be divided into:

- Onsite promotion and sponsor promotions (Allen et al 2002)

- Signage - Directional, Statutory, Operational and Facility (O'Toole & Mikolaitis 2002)
- Voice communication through radio, PA announcements, mobile telephones
- Event operation manual
- Information booths
- Visual and audio cues
- Onsite briefings
- Print - programmes, leaflets, newssheets (Edgecombe 1999; NSW Centenary of Federation Committee 2000; Scouting Australia 2001; O'Toole 2003a; Silvers 2004)

In an industry that is subject to change, the ability to communicate changes in plan is essential for success. Part of the OSC function is to monitor the implementation of the design plan and communicate changes in the plan. For this reason the onsite communication can take a higher priority than in traditional project management. The onsite voice communication system is important for announcing last minute changes, directing crowds and during the occurrence of an emergency (EMA 1999). An efficient onsite communication strategy and the use of the checklist can be regarded as a management response to the uncertainty and changeability of the event management environment. Both tools are able to communicate quickly with the core event stakeholders - the staff and the attendees - and enable the event management to minimise the secondary risk resulting from any changes.

Event Documentation, Filing and Archiving

The documents used to support the communication process and record the event management process include:

1. Budget
2. Tasks lists
3. Responsibility lists
4. Contracts
5. Schedules
6. Proof of compliance documents
7. Reports (Tonge 2000; O'Toole & Mikolaitis 2002)

Although the event texts list these documents, they are under different names. This is to be expected in an immature industry lacking a standard terminology (O'Toole 2002a). For example, the output of the time management, the schedule, is called by

a variety of names such as production schedule, run sheets, time sheets, cue sheets. Figure 9.4 shows the document outputs identified by O'Toole (2003a) in an event project management system.
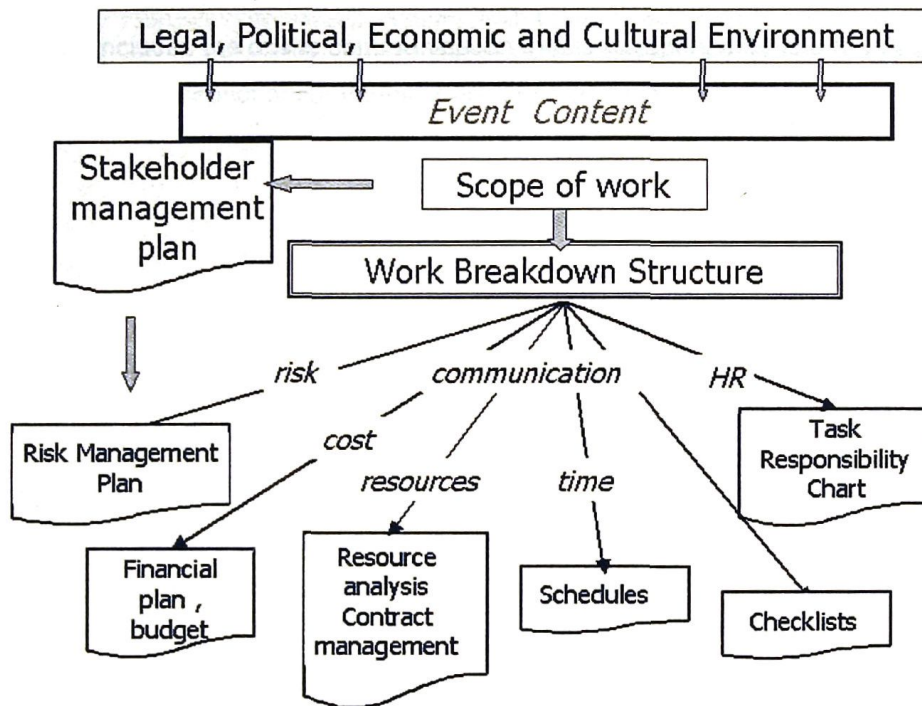

Figure 9.4 Document outputs, Source O'Toole (2003a), reproduced with permission

The filing system used for event management is treated by only two of the texts. O'Toole & Mikolaitis (2002) recommend using categories of WBS as the basis of all information filing so that the staff can retrieve the information quickly. They stress that the characteristic of an event filing system is the easy retrieval of time relevant information. Tonge outlines the need to consolidate and archive all event documents so that future events managed by the same organisation can benefit from their history (Tonge 2000).

Summary

The PMBOK communication management is necessary but not sufficient to describe the equivalent area in event management. All the event management processes have to work in a complex and ever changing environment that needs to meet an
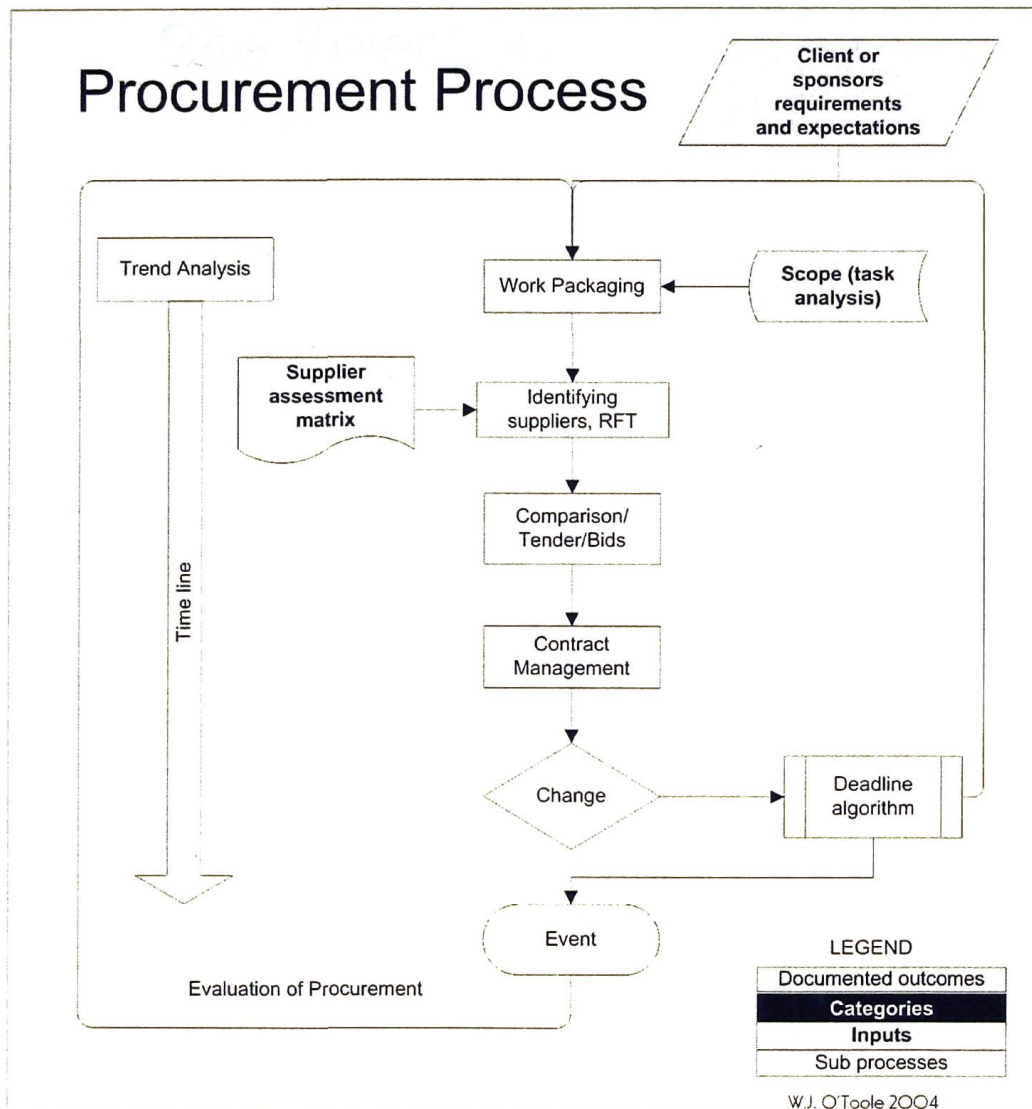
absolute deadline. Therefore, to use a formal process or parts of the process mixed with more informal methods is a risk management decision. The assessment of the risk to the deadline highlights the importance of fluid communication within such an environment. Communication with the attendees prior to an event, is a unique feature to the event industry. The event texts describe a sophisticated system of promotion that is part of the event marketing process. The event communication process includes the onsite communication that is indispensable and timely during the event. This aspect of communication is not found in PMBOK.

Chapter 10 Procurement Management

The PMBOK procurement management process is similar to that used in event management. However, due to the complexity of the event environment and the intangible product, there is are different emphasises and priorities. The ability of the suppliers to accommodate change is stressed by the event literature. Procurement, as a term, is not common in the event literature, and the description of the procurement process tends to be distributed into various categories such as:

- Managing Vendor Contracts (Goldblatt 2002)
- Staging, Logistics and Legal and Risk Management (Bowdin et al 2001)
- The 12-Point Management Plan (Malouf 1999)
- Contract Management, Costing, Procurement and Cash Flow (O'Toole & Mikolaitis 2002)
- Managing suppliers to conventions (McCabe et al 2000).

The event manuals place the procurement process into more specific supplier headings such as "Booking Entertainment for the Smaller Event'" (IFEA 1997), "Amenities and Equipment" (Community Festival Handbook 1991). The procurement process for event management is illustrated in Figure 10.1. It is substantially the same as that described in PMBOK. However it operates under an environment of change; within a short timeframe; under the major constraint of the deadline; and with the need to forecast external trends.
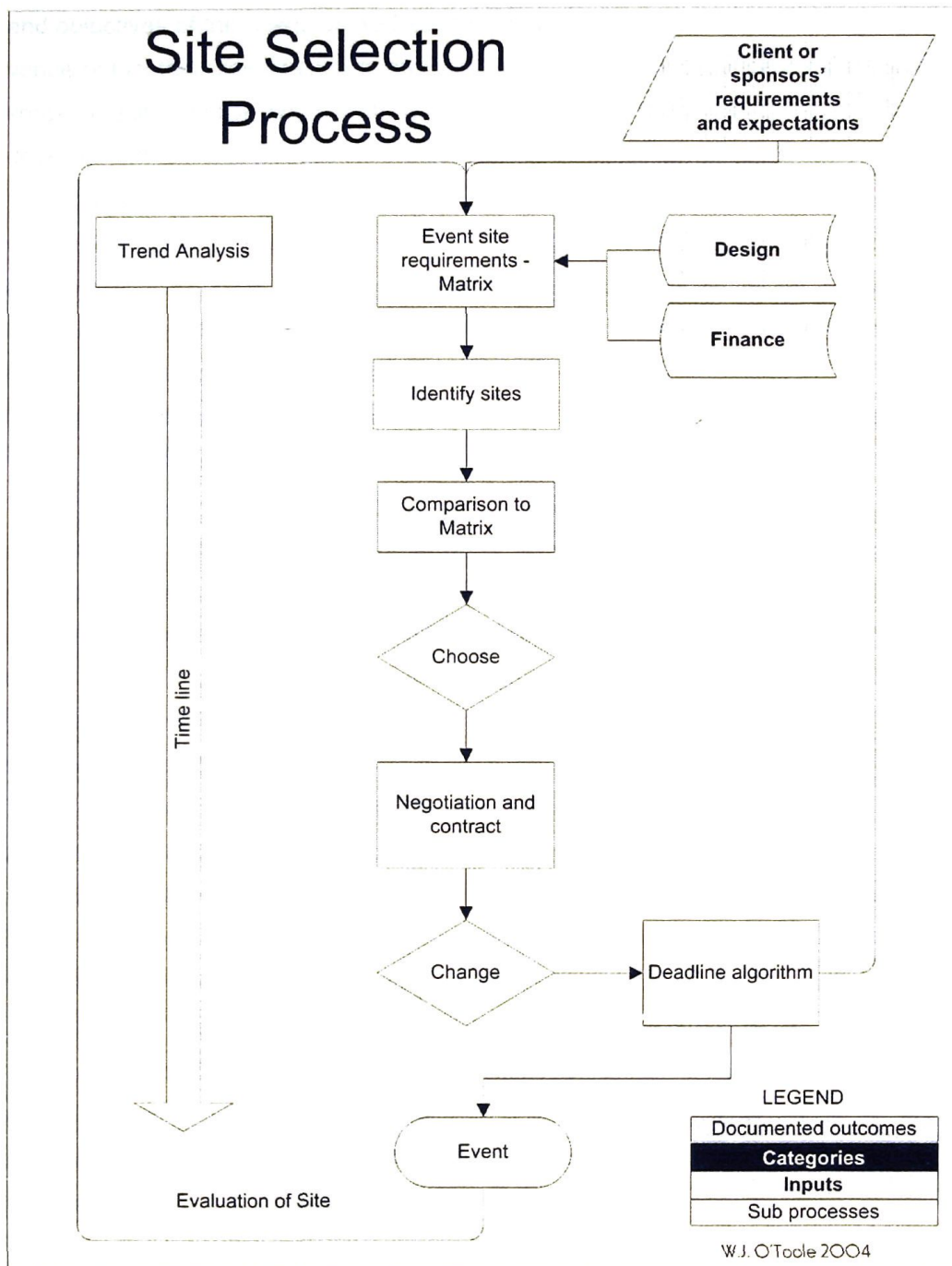
Figure 10.1 Procurement management process

Site/venue Choice

Most authors regard the sourcing and procurement of the correct venue as essential to event success. Figure 10.2 illustrates the process involved in the site/venue choice.

'"The choice of venue is a crucial decision that will ultimately determine many of the elements of staging" (Allen et al 2002, p. 364)
"The selection of the site (location), where you will be holding your event is of primary importance, it can make or break your event" (Allen 2000, p.37)

Figure 10.2. Site procurement process

It is in this choice and contracting that all the elements of the PMBOK procurement process are employed. However, site choice is not a consideration in most project management. Silvers (2004, p. 65) summarises the central place the choice of the site takes in event management:

"Site selection is both a science and an art- part investigation and part intuition. The professional event coordinator will select a site based on the purpose, role, goals,

and objectives of the event, as well as the capabilities, desirability, and safety of the venue or location. The site where an event is held can have significant impact on the shape and style of the event, and vice versa, and may or may not require additional development to make it ready for the guests."

Once the event management is committed to the venue or site, it becomes a constraint to all other planning. O'Toole (2003a) points out an example of the influence of site choice on all other areas of event management with his example of 'sponsorship clash'. A specific company may sponsor the venue. This restricts the choice of event sponsorship.

It is regarded as so important that the term 'clean site' is used to describe an event venue that has no sponsorship requirements (Official Report of the XXVII Olympiad 2001).

As it becomes a constraint on all other event activities, it is essential to investigate the requirements and opportunities afforded by the venue. O'Toole & Mikolaitis (2002), Sonder (2004) and Silvers (2004) recommend the use of detailed checklists during the site inspection to ensure all aspects of the site planning are covered. O'Toole & Mikolaitis (2002) recommends the use of a site map as a way to design the event site and as the deliverable of the site planning/design process.

The procurement of the site is, therefore, closely linked to the Design process as described in Chapter 4 of this thesis.

A decision that is not discussed widely in the event literature is the choice of whether to use a purpose-built venue or a venue that does not normally have events. A purpose built venue offers the standard features to accommodate the event. It has been built with the consideration to the flow of attendees and equipment. However, the familiarity of the venue to the target market can diminish the unique nature of the event. This is aspect of event management is discussed in Chapter 4, Design.. The organisation SUVA (Sydney Unique Venue Association) promotes the uniqueness of their venues as an advantage to the event.

Contract management.

Of the identified texts about event management, only one has a chapter specifically describing the contract management process. "It is not surprising in such a young industry that so little information is available on event related contracts..." (O'Toole & Mikolaitis 2002, p. 153). Most of the texts emphasise the importance to have agreements written down (Malouf 1999; Goldblatt 2002; Allen et al 2002; Sonder 2004; Silvers 2004).

The uniqueness of some events means that there is a large element of uncertainty in specifying requirements. This leads Shone (2001) to comment on the use of trade organisations to minimise the risk associated with a new industry. Malouf (1999) recommends only using International Special Event Society (ISES) accredited contractors. Further Malouf recommends that the contractors should be given an overall impression of the event as well as their specific points of detail. O'Toole & Mikolaitis (2002) advocate using three categories of specification: function to the event, technical description and performance at the event, to reduce the misunderstandings. Allen et al (2002), Malouf (1999) both advise establishing a relationship with the suppliers such as partnering. The use of informal communication is suggested as a method to ensure clear understanding of specifications and minimising any disruption from changing circumstances.

"The use of these various organisations is a matter not only of budget, but also of the experience (or lack of it) on the part of buyers, of the standard to be achieved at a given event, of the time available to make arrangements and of the requirements of the organization making the booking and completing the planning process." (Malouf 1999, p. 170)

Agreeing with Shone, O'Toole (2002, p. 157) notes:

"What separates the corporate event contract from others is the overriding importance of time"

For this reason negotiation and the process of selling the event to the suppliers is suggested by some authors (Tilley 1997). Others stress the importance of informal communication to minimise misunderstandings.

Allen et al (2002) list five categories of event contracts:
- Sponsors
- Venue
- Entertainers
- Broadcast
- Suppliers
- Client

Each of these contracts is made with a supplier whose core business is not necessarily to supply events. Therefore the event manager needs to have knowledge of a variety of non-event industry specific terms (Allen et al 2002). The common example of this variety and uniqueness of contracts is provided by the rider on the entertainment contract. The rider is an appendix to the contract. Silvers (2004), O'Toole (2003), Allen et al (2002) and Sonder (2004) warn of the risks involved in the rider. It is unique to entertainment contracts and can cause significant financial loss as it details the hospitality requirements of the artist and their accompanying personnel. The requirements may cost more than the original negotiated fee.

The intangible and transitory nature of the event product is reflected in the procurement process. An important decision is the make, buy or hire the supplies and services. The contractor may supply goods that only need to last to the last day of the event. The short time frames and temporary nature of the event infrastructure, means that the comparatively lengthy PMBOK process cannot be realistically undertaken.

As the event will have unique aspects to it, there will be unique goods and/or services. There may be a unique combination of suppliers. Some of the suppliers would not be familiar with events. All of this leads to uncertainty. A small change in one of the suppliers, the goods or services can influence all other areas of the event (O'Toole & Mikolaitis 2002, Business Excellence Australia 2003). In particular this leads to uncertainty in costing the event and the event project. This subject is further explored in Chapter 6 Finance of this thesis.

Contract variations

"Changes are inevitable, but not all changes can be foreseen in the negotiation and awarding of the contract. These changes could be external to the event and therefore uncontrollable, ort come from inside the event organisation and, if known, controllable." (O'Toole & Mikolaitis 2002, p. 166)

PMBOK deals with change in its section on contract variations. However, as noted above, variations are not the exception in event management. The scope is developing as the event project passes though its phases. The fixed specification recommended in many project textbook can be detrimental to the overall objectives of the event. The term variation implies a standard state. However in a dynamic system, change is the standard state. It is the normal working environment.
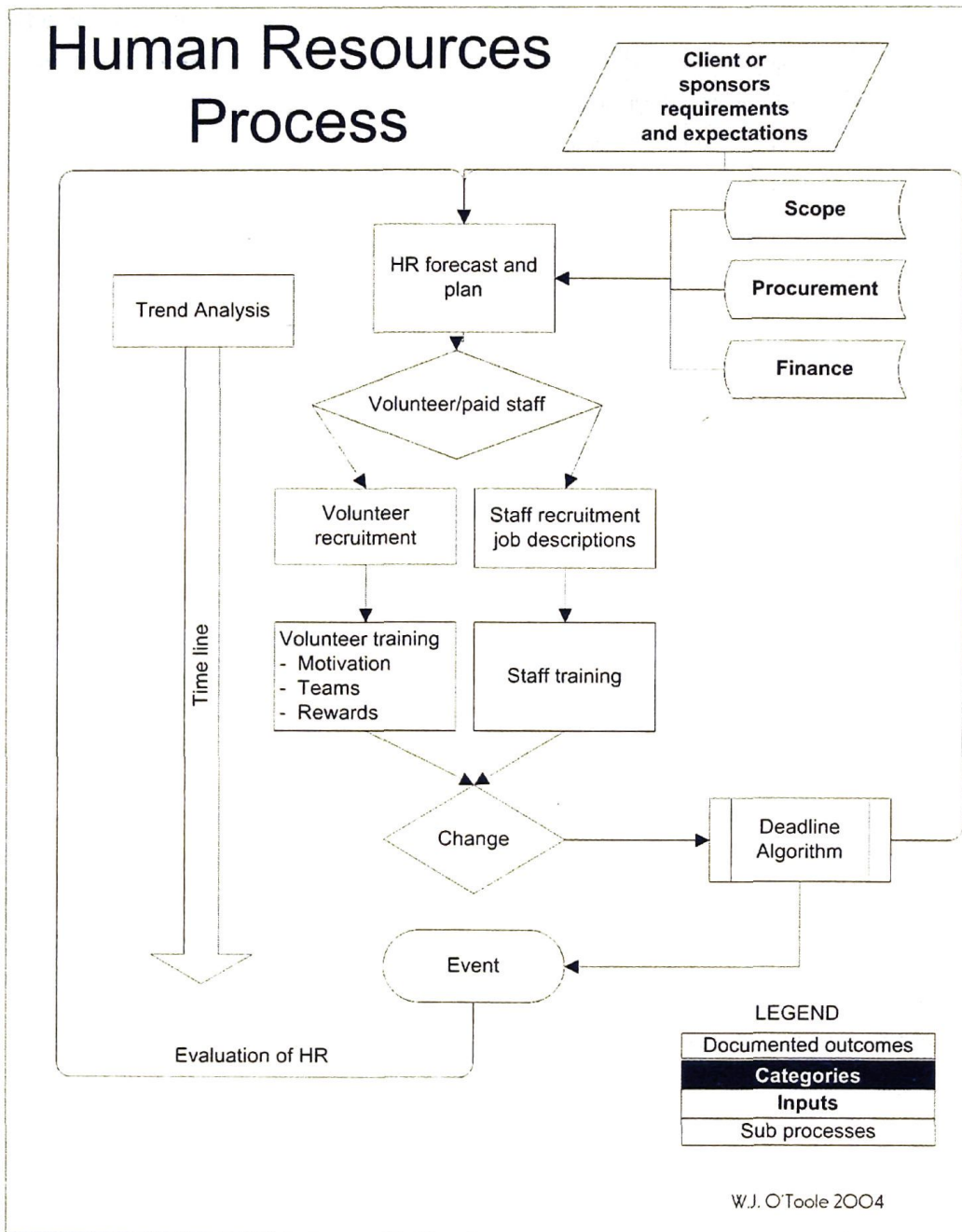
Summary

The PMBOK model of procurement needs to be adapted to the environment characterised by short-term logistics, uncertainty and change. An important decision concerns the choice of venue that is where the event is to be held. The choice of venue will create opportunities and constraints on the event. Other contracts used in events are various and numerous. The result is that the PMBOK procurement process is too unwieldy to be used in the fast changing event environment in which quicker, more flexible and informal arrangements are made.

Chapter 11 Human Resources

"The event management industry is primarily a service industry, and therefore its vital part consists of intangible things such as the customer service. You cannot touch it or smell it, but it exists, and moreover, it can make your events a disaster or a complete success. You are being paid to create memorable positive experiences, and you and your staff are the critical resource that makes a guest's experience memorable"
Goldblatt 2002, p. 108

This quote from Dr Goldblatt illustrates a fundamental difference between the PMBOK and event management – the intangible nature of the asset. This is no more evident than in the management of human resources. The PMBOK HR process is limited in its applicability by the short time frame of most events and the volunteer management used in many events. There are two systems of HR running side by side that need to complement each other. These are the professional staff, part time or fulltime, and the volunteers. Figure 11.1 shows these two processes in tandem as the event planning and implementation proceeds.

Figure 11.1 Human resource management process

Figure 11.2 shows a simplified version of the PMBOK process for Human Resource management. This process is also recommended by the texts in event management

Organisation planning ➡ Staff planning ➡ Implementation (acquisition) ➡ Development

Figure 11.2 Standard HR process

The process must work under the constraint of the deadline and in an uncertain and complex environment.

In addition, the HR process Figure 11.2 will be moderated by these characteristics:

- Event management makes wide use of volunteers (Allen et al 2002; Getz 1997)
- The event is an intangible asset and the value of the asset is directly related to the service delivered by the staff. The staff during the event is, therefore, part of the product. (Getz 1997)
- The event is short lived
- Certain events require a high level of creativity.

This is illustrated by Birch (2004, p. 247) when discussing recruitment technique for major ceremonies, such as the opening of the Barcelona Olympics:

"For Pepo, the selection process started over a meal, because he refused to hire people if he found they were dull over dinner. It's not a bad method either. The creative people best suited to ceremonies have intangible qualities of imagination and ideas that a conversation over dinner will bring out much better that an interview across a desk."

Other characteristics of the event environment that affect the HR process are:

1.   Importance of customer service
2.   High turnover of paid staff and volunteers - the average turn over cycle may be less than the period of the event project life cycle
3.   Importance of a diverse staff to better represent the needs of the attendees. (Goldblatt 2002)

Volunteers

"Volunteers are the foundation of a successful Olympic Games, and the commitment, enthusiasm and involvement of all volunteers is essential for the success of the Sydney 2000." (Official Report of the XXVII Olympiad 2001)

The use of unpaid staff creates a different training environment compared to the methods used to train paid staff. Two characteristics for successful volunteer training that are stressed in the event texts are:

1.   Leadership
2.   Motivation (Getz1997; Silvers 2004)

Leadership is regarded by many of the event authors as an important aspect of event management (Getz 1997; Goldblatt 2002; Allen et al 2002).Goldblatt (2005 p. 158) writes "Professional Event management is truly a leadership process". This emphasis on leadership can be regarded as a management solution to a changing environment. Leadership implies motivation rather than control (Goldblatt 2002). Motivation is suitable to flexibility provided by teams (Getz 1997). The Cricket World Cup Vlunteers 2003 Training Manual lists as a benefit of volunteering : "Participation has long been seen as an essential element of good governance and development. Volunteering is a key means by which individuals articulate their engagements as citizens, and by building trust and reciprocity among citizens volunteering contributes to a more cohesive, stable society." (ICC 2003 p.1). There needs to be a substitute in the management of volunteers for many of the incentives given to the full time paid staff, such as promotion, increase in wages or increase in equity. Related to this are the disincentives of demotion, financial penalties or decrease in value of the company, which have no application to temporary volunteers or temporary staff.

The quote from Surbeck illustrates the numerous skills a leader requires in event management:

"The team leader will have the tasks of keeping the support team positive and productive, as well as being able to lead and communicate effectively, to compliment and cajole, to push and prod, to stimulate and most of all to motivate team members to continue to giving their best." (Surbeck 1991, p. 31)

A Volunteer can be defined as

"A person who agrees to undertake an activity related to the event, either directly or indirectly, and is not part to an employment contract or other contractual arrangement with regard to the agreed activity" (Holme 2002, p1)

Volunteers are regarded as central to the success of many events (Harris & Allen 2002; Allen et al 2002; Barrett 2001).

According to the Director, School of Volunteer Management, the decision to use volunteers for an event will be based on:

1.   Lack of in house resources to undertake the event

2.   The service is appropriate for volunteers

3.   Volunteers are more flexible (Holmes 2002).

Identification of the motivators for volunteers is essential in volunteer management. These include:

- A strong belief and enthusiasm for the event
- A desire to contribute to the life of the community
- Opportunities to learn new skills and gain valued experiences
- Work experience and references, with a view to paid employment
- Commitment to interests of family members and friends
- Access to an event otherwise beyond personal means
- Sense of obligation
- Joint action with a group of friends
- Desire for meaningful activity
- Opportunity to be recognised and appreciated
- Fun.

(Barrett 2001; Harris & Allen 2002; ICC 2003)

This presents a complex array. Satisfying one motivator may dissatisfy another. These do not represent an exact measurable outcome. They can be measured after the event by asking the volunteers. The skill levels of volunteers will vary (Barrett 2001). Both these factors introduce a high degree of uncertainty into the HR process.

Creating teams and team leaders is identified as important to volunteer management (Harris & Allen 2002; Allen et al 2002) .In addition the possible friction between paid staff and volunteer has to be pre-empted (Allen et al 2002).

A large number of volunteers means that the event organisation has to be structured so that they have a way to define their roles and absorb them as the size of the event teams grow (Tonge 2000).

There are a number of discussions about the negative side of volunteers. This includes:
1.   Depleting the asset
2.   Difficulty of succession planning
3.   Ownership of event knowledge
4   Incorrect cost/benefit analysis of 'free' labour (Nelson 2002).

Part of the HR planning must include the ability to manage a creative team. This is in response to the need for innovation at many events (Harris & Allen 2002).

"Early planning was based on anticipated need for 40, 000 volunteers, and the eventual confirmed number was 46, 967. Finding and preparing this special workforce was a massive undertaking, assisted by relationships that SOCOG developed with Australia's volunteering community, which had a strong interest in the Games and the legacies for volunteering from this event. Many community-based organisations supported the recruitment of volunteers and provided invaluable advice on how to conduct the Program. From November 1997 this happened largely through the Volunteers 2000 Advisory Committee, which included representatives of high-profile community and service organisations and interest groups."
(Out and About : Volunteers : Page 1).

Other characteristics of the event management environment that influence the HR include:

1.   Short term nature of many event projects that does not allow the time to assimilate and train event personnel as described in the PMBOK.

2.   The event organisation is 'pulsating' (Hanlon 2000) in the size of its human resources. This means that the size of the workforce can increase and decrease dramatically over the event projects life. Most of the staff and volunteers are needed during the event itself. The professional staff are often part-time.

3.   Some events are completely run by volunteers (Tonge 2000).

4.   The volunteers are often recruited from the key stakeholders such as the sponsors and local community.
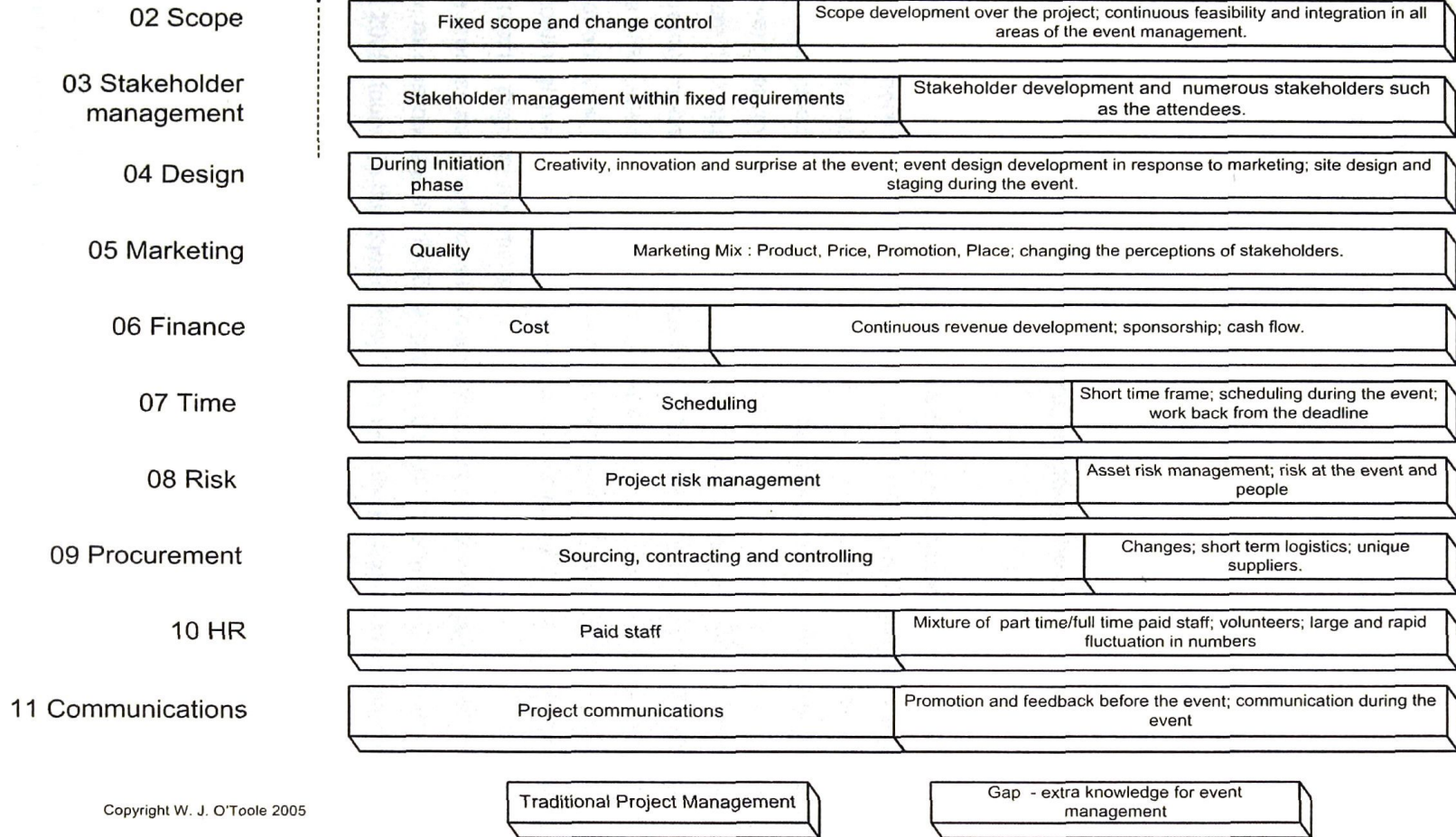
Although the texts discuss the uncertainty associated with volunteers - such as they don't turn up and often require extra resources – Silvers (2004) and Allen et al (2005) describe the work of Janet Landey in South Africa and the use of events to raise the skill of the host population. The short time frame of event planning and the uncertainty of work in the industry are reflected in the lack of trained staff. The training of an unemployed workforce as part of the Black Economic Empowerment, can solve many of these problems. Such training can be articulated into the national education framework. In this way, volunteering for work on an event can be part of the education system (ICC 2003). Events Tasmania (2004) has implemented a similar system.

Summary

The delivery of an event will employ the PMBOK process to the degree limited by the deadline and the short-term nature of the event project. Many events use volunteers and this introduces a process outside of that described by PMBOK. In particular, leadership and motivation take over from financial rewards. These soft methods are essential in managing volunteers. The advantage of these methods is that they are effective in an environment that is subject to change and requires autonomous teams. The mix of volunteers and paid staff and the quick growth in the human resources, introduces a further uncertainty in the management of events.

Event Management Body of Knowledge

Chapters of Thesis

Chapter	Traditional Project Management	Gap - extra knowledge for event management
02 Scope	Fixed scope and change control	Scope development over the project; continuous feasibility and integration in all areas of the event management.
03 Stakeholder management	Stakeholder management within fixed requirements	Stakeholder development and numerous stakeholders such as the attendees.
04 Design	During Initiation phase	Creativity, innovation and surprise at the event; event design development in response to marketing; site design and staging during the event.
05 Marketing	Quality	Marketing Mix : Product, Price, Promotion, Place; changing the perceptions of stakeholders.
06 Finance	Cost	Continuous revenue development; sponsorship; cash flow.
07 Time	Scheduling	Short time frame; scheduling during the event; work back from the deadline
08 Risk	Project risk management	Asset risk management; risk at the event and people
09 Procurement	Sourcing, contracting and controlling	Changes; short term logistics; unique suppliers.
10 HR	Paid staff	Mixture of part time/full time paid staff; volunteers; large and rapid fluctuation in numbers
11 Communications	Project communications	Promotion and feedback before the event; communication during the event

Traditional Project Management

Gap - extra knowledge for event management

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Conclusion

Figure 12.1 is a summary of the observations and discussion in this thesis. It identifies all the areas of knowledge needed for the management of an event. On the left hand side area the aspects of traditional project management used in event management. The right hand side shows the gap between this and actual event management. According to the definition of a project given in the standard texts (Dinsmore 1990; Weiss 1992; Burke 1992; Cleland 1998; Kerzner 1998; Reiss 1999; Turner 1999; Leach 2000; PMBOK 2000; Gray & Larson 2000; Wilderman n.d.), an event is a project. However, a company employing only the standard methodology as described in PMBOK and these standard texts, would not be able to organise an event.

As explained in Chapter 1 of this thesis, I present an exploratory model of event management. There is not sufficient data about this rapidly emerging industry to enable the sliding scales of Figure 12.1 to be supported by measurements. Therefore, it is based on expert opinion supported by the various event textbooks and the event documents listed in the Bibliography.

From Figure 12.1 arise the process maps used in each chapter. They are the basis of the exploratory model of event management. They illustrate the processes used in each area of knowledge. The limitation of these process maps reflect the limitation of any kind of analysis. They do not show the constant iterations within each process and the continual interaction at every level between the processes. Like every map or model of reality, they are a summary .

When the process maps are combined with the work of the international EMBOK executive, as described in the EMBOK paper (Silvers, J, Bowdin, G, O'Toole, W & Nelson K 2005) found in this thesis, they complete the picture of event management. The EMBOK executive is currently working on the knowledge areas (*data*) over the phases of the event project life cycle (*time*). This thesis provided the third dimension, *processes*.

It is the hypothesis of this thesis that the gap between standard project management and event management is a result of the following:

1.   Event management is a dynamic system. Change and continuous integration are part of the normal management.

2.   Event management acts in an management environment of uncertainty and complexity.

Each section of figure 12.1 can be related to these two conclusions.

There are key characteristics of the event field that limit the applicability of standard project management. In summary, they include:

- A large number of stakeholders that can increase rapidly. The stakeholders may commit to the event at any time as the project progresses.
- Many objectives, ill defined objectives and conflicting objectives, which are subject to internal and external change.
- Intangible nature of the main event products and outcomes, such as customer satisfaction, community morale, surprise, cultural enhancement and knowledge.
- Temporary nature of many aspects of event management including configuration of suppliers, event assets, the event site and the unique resources.
- Uncertainty of incoming revenue and cost reduction.
- Fixed deadline which produces a priority for all the management processes over a short timeline.
- Highly variable human resources that often rely on unpredictable volunteer labour.

This thesis is not a theoretical construct. It is an attempt to find a remedy to the very real growing pains of a new industry. Large events such as the Olympics are struggling with their adopted project management system (Timmins 2002, Johnson 2002b). Medium size events have no or little event management software to assist in their management. Many of them have tried project management and failed. In the professional experience of the author, local councils around Australia have trained their event managers in MS Project, only to find that it is not used. The government of countries such as Saudi Arabia and South Africa are searching for an event management system that can be integrated into eduction, training, legislation and compliance. At first they tried standard project management, only to find that they had to bring in outside consultants to adapt and assess the results.

At the front end of event management – on the ground – this problem is played out in terms of jobs and responsibility. In their third edition Allen et all (2005), describe the solution as

" 1 Expand the skill base of the event manager to include project management.

  2. Reduce the responsibilities of the event manager and hire a project manager.

  3. Train existing project managers in events management."

The Future

The next step in the EMBOK project is to publish the EMBOK matrix made up of the three dimensions of Phases, Areas of Knowledge and Processes. As stated in the aims of the EMBOK listed in this thesis' Preface, it will enable an integrated approach to the profession. Training, software, competency levels, supplier assessment. legislation guidelines, directions for research, job descriptions and an international standard will be created within the one international framework, in a similar way to the professions of engineering and project management.

As well, the inclusion of event management into the project management fold will influence project management. In much the same way as software development projects influenced project management in the 1960's and 1970's. Event management contains skills , methods and knowledge that can help other types of projects. These include:

- Events almost always occurs on time, which is unusual in many other fields.
- The ability of event management to be successful in spite of a high degree of uncertainty.
- The concept of scope development is basic to event management. This is similar to research and development projects.
- The intangible nature of the outcomes is similar to political and social campaign management.
- The mix of volunteers and experts and the multiplicity of stakeholders is similar to international aid projects.
- Many of the more traditional projects such as civil engineering are finding that the intangible outcomes, such as environment and social impacts, and marketing are as important as the technical requirements of the stakeholders.

Finally, with the rapid changes in modern business, such as takeovers and shifts in shareholder value, the general business management environment is now closer to the event management environment of constant change and development. The incorporation of event management into the general field of project management is more that just saying "an event is a project by definition". There will be the mutual

influence, a dialectic of conflict and agreement reaching a synthesis that benefits both fields. Current project management can give events the discipline, compliance and an accountable management system. Events can give project management the ability to work creatively in an uncertain environment arising from scope development.

"Within every field , there are those individuals who either on purpose or by accident invent a new theory or practice that in fact revolutionizes the field... (The) careful merger of event and project management will be recorded by historians of event literature as one of the most significant advancements in event management during the twenty-first century."

Dr J Goldblatt, CSEP, Dean and Professor, Johnson & Wales, 2002

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Appendix

The appendix contains work completed during the candidature. It is highly relevant to the thesis but not easily available. The documents are identified by their listing in the references of the thesis:

Business Excellence Australia 2003, **Risk Management for Events**, Standards Australia, Sydney. **Risk Identification**.

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O'Toole, W 2005, '**Handover Ceremony and Celebrations in East Timor from a project management perspective**' in Getz, D 2005, Event Management and Event Tourism 2nd edn, Cognizant Communication, New York (in press).

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