



Master Consultants Ltd

Growing People, Growing Organizations

COURSE OULINE

INTERNATIONAL DIPLOMA IN

EVENTS MANAGEMENT

Westcom Point, 2nd Floor, Mahiga Mairu Avenue, Westlands, Nairobi.

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Module One - The Event Project

Historical background to events

The modern meetings & events industry

Broad categories of events:

personal, corporate, arts & culture, sporting,
associations, media, advertising, community,
educational, common interest groups, political

Guide to sizes of events

Indoor and outdoor event venues

Events and projects:

events management and project management skills
differences between events and other projects:
time and financial constraints

Events and attractions:

relationships and differences
site and event attractions, combinations

Parties to an event:

initiators, planners, manager, stakeholders,
sponsors, service providers, promoters

Stakeholders:

primary and secondary
positive and negative
the host community

Event creation:

environmental scanning:
information gathering and analysis
the "five Ws of event creation":
reasons why an event is to be held; profit, fundraising, etc
who an event is for; participants, spectators, attendees
when best to hold the event, considerations
where to hold an event; the venue, considerations
what purpose is to be achieved by the event
brainstorming to produce ideas

Feasibility of an event:

technical feasibility
financial feasibility
viability - possibility of achieving its objectives

The WOW factor of an event:

adding something special or memorable

Theming the event:

developing its concept into a theme to shape and unify the event

Using checklists - example

The event program:

the detailed schedule of activities

The summarised printed programme

Programming:

the art of selecting and arranging the elements of an event

Module Two - Event Personnel

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- The event manager or leader:
 - definition of management
 - definition of a manager
 - range of duties and responsibilities
 - skills, abilities and expertise needed
- The activity of management:
 - definition of a leader
 - functions of management:
 - planning
 - organising
 - co-ordinating
 - commanding
 - controlling
- The event team:
 - composition and diversity
 - stages in group formation:
 - forming, storming, norming, performing
- Short-term event teams:
 - special problems presented
 - casual and temporary workers
 - using volunteers and students
 - lack of commitment
 - finding the most suitable tasks, making work "fun"
- Diversity of event teams:
 - range of skills, talents and abilities
 - group norms and cohesion
 - creative teams and brainstorming
- Briefings and de-briefings
- Need for contingency plans
- Unspoken communication or body language
- Improving communication skills:
 - clarity and conciseness
 - confidence, empathy, respect, feedback
- The creative team:
 - duties and responsibilities of:
 - the artistic director
 - designer
 - music director
 - performance co-ordinator
 - technical director
 - production manager
- Other services and personnel
- Decision making:
 - stages in the decision-making process
- Time management:
 - its importance in event management
 - what should be achieved
 - tips for improving time management

Module Three - Event Planning

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The event concept and purpose:

- examples of how and from what ideas arise

Identifying opportunities

- factors to be considered

- events leaving a legacy

The vision and the mission statement:

- why they should be put down in writing

- practical example

Event strategy:

- how an event's goals will be achieved

Setting SMART goals or objectives:

- specific, measurable, achievable, relevant, time-based

- variety of bases for setting objectives

SWOT analysis:

- considering strengths, weaknesses, opportunities and threats

- factors to be taken into account practical example

Lead time:

- reasons why it must be taken into account

- contingency periods

Event dates:

- some factors to consider:

 - nature of the event, weather, target audience,

 - clash diaries, complementary activities,

 - competition, resources

Shoulder periods

The venue:

- event history, venue history and reputation, location,

- budget, conditions of contract, audience, timing,

- services and resources, transport and parking,

- infrastructure and layout, restrictions, reinstatement

The event action plan:

- detailing key event project stages or milestones

- major activities detailed in an action plan

The event business plan:

- communicating the strategic plan for taking the event forward

- association with and difference from the action plan benefits of

- preparing a business plan

- key areas to be addressed in the business plan

- suggested sequence for a documented event business plan:

 - front cover and contents

 - introductory summary

 - background and history

 - overview of the current year or period

 - the development plan: going forward

 - event requirements

 - marketing and communication plans

 - financial plan and considerations

 - management and business controls

 - risk management

- the presentation

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Reviews of the business plan

Module Four - Event Budgets and Financial Planning

The event budget as a forecast and projection

Income and out-goings

Importance of financial control:

- dangers of the lack of control

- Manual and computerised (spreadsheet) budget preparation:

 - the need for flexibility and amendments

Some do's and don'ts of budget development

The need for transparency

Sources of event income:

- public grants

- sponsorship

- merchandise sales

- concessions, franchises and licences

- entry or participation fees

- stand or area rental charges

- raffles, sweepstakes, competitions and games

- ticket sales - spectator entrance charges

- advertising

- in-kind sponsorship and donations

Typical event expenditure, including:

- travel & accommodation, trophies & awards

- postage & telephone, stationery & printing,

- medical fees, venue hire/rental, insurance,

- promotion, equipment hire, transport

Example of a live event budget

Financial Accounting & Management Control

Importance of financial data and statements

The need for careful monitoring and recording of financial data

Recording transactions - bookkeeping:

- manual recording, books of account

- computerised accounting software packages

- the dual aspects of a transaction: receiving and giving

- cash transactions and credit transactions assets and

- liabilities

Cost-oriented and income-oriented events:

- break-even

Budgetary control

Profit or surplus

Financial control before, during and after an event

Event goals and finances:

- feasibility studies

Appointment of a financial controller:

- duties and responsibilities

- obtaining quotations in writing:

 - avoiding guesswork and assumptions

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Major areas needing financial control:

income - receipts of money:

security for cash

receipts by cheque, credit/debit cards, direct debits

payments - expenditure:

authority to make payments

petty cash; the float and imprest

Purchase orders

Sales invoices

Final Accounts:

receipts & payments accounts:

events and organizations for which they are prepared

specimen

income & expenditure accounts

events and organizations for which they are prepared

profit & loss accounts:

events and organizations for which they are prepared

balance sheets

Module Five - Corporate Sponsorship

What sponsorship involves

Reasons for the increase in sponsorship opportunities

Benefits for sponsors:

advertising

targeting

communicating corporate values

business to business (B2B) connections

corporate hospitality

stakeholder benefits

Factors to consider in deciding whether to seek sponsorship

Finding sponsors for events

identifying potential sponsors - profiling

compatibility of products with an event's audience:

practical examples

major sponsors and sponsors for sub-events

Components of sponsorship packages:

title or name sponsorship

exclusivity

brand exposure and branding

media exposure

advertising

merchandising rights

sampling opportunities

discounted tickets and merchandise prices

long-term relationship

hospitality opportunities

product creation

literature distribution

Specimens of sponsorship packages and opportunities

Setting the value of sponsorship:

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getting the “balance” right between too high and too low
Costs associated with delivery of packages to sponsors

Approaching prospective sponsors:

- the sponsorship plan

- what each sponsor might seek

- proposal to sponsor:

 - tailoring to each potential sponsor

The sponsorship proposal document:

- what it should contain:

 - keeping it brief and to the point

 - presentation, the need to attract the eyes of readers

 - the cover or front page

 - brief overview

 - audience profile and attendance levels

 - benefit/packages available to sponsors

 - prices of packages

Answering questions from potential sponsors:

- number of attendees expected attendee

- demographic breakdown

- other sponsors

- types and prices of sponsorship packages

- return on investment expected

Sponsorship agreements or contracts:

- why they are needed

- typical issues covered

- specimen of a sponsorship agreement

On-going relations with sponsors

Branding plans

Post-event reports

Module Six - Event Venues

Increase in variety of venues available

Crucial importance of the correct venue selection

Assessment of the logistics involved

Event dates and venue availability

Basic considerations:

- indoor or outdoor

- audience capacity

- how long venue will be needed

- need for public transport access

Selecting a location:

- target audience or guest list

- budget available

Factors in venue selection

Sources of venue information

Facets of suitability:

- dimensions, environment, facilities, location/position, cost

Site visits

Agreeing prices and terms:

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what is and what is not included in the hire/rental charge
negotiating with venue managements ascertaining any restrictions
who pays for insurance, security, etc
Specimen of venue hire/rental agreement relating to restrictions on the use of the venue
Booking and confirmation:
checking the draft agreement/contract
Follow-up site visits
Non-traditional venues:
architectural spaces
experiential venues
moving venues
Factors to consider in using non-traditional venues:
food and drinks, lack of furniture, tableware, etc
lack of security

Food and Beverages at Events

Outsourcing food and beverage supplies
Hotels and restaurants:
types of catering which might be offered:
canapés, full meals, buffets, carveries, BBQs
waiter service and self-service
Venues without facilities for food and beverages:
employing outside caterers
Outsourcing to independent businesses at venues:
finding suitable/reputable concessionaires
controlling concessionaires
trading licences needed
health & safety considerations
site fees or percentage of takings
Ordering supplies and arranging services:
obtaining quotations
the tendering process
purchase orders

Module Seven - The Event Program and Schedule

The schedule as a timetable: chronological order
Developing the program schedule:
factors to be considered, checklist
typical component parts:
main or core entertainment/focus
secondary entertainment/focus
support entertainment/activities
ancillary activities
practical examples of events
Timing program activities:
special features to consider
consulting other parties involved:

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- competitors, sponsors, exhibitors
- multiple performances
- concurrent activities
- timing and sequencing of activities
- time intervals, commercial breaks
- Event ceremonies:
 - opening, welcome, closing speeches
 - award/medal presentations
- contingency planning in case:
 - dignitaries are late or fail to turn up
 - crowds are dispersed
 - dignitaries arrive at busy or slack times
- Using Gantt charts as graphical illustrations to:
 - plan, co-ordinate and track specific tasks
 - manual and computerised versions
- identifying tasks which:
 - can be executed in parallel
 - must be executed in sequence
- Event programmes for distribution to patrons
 - printed versions, typical contents
 - entry forms for competitive activities
- production and format:
 - single sheets, pamphlets and booklets
 - in-house or professional reproduction
 - methods of distribution
- advertising:
 - helping to offset production costs
 - setting prices
 - sponsors' advertisements, local business advertising

Module Eight - Legal Issues

- Responsibilities under the law
- Liabilities: legal responsibility for acts or omissions
- Organisational structure and legal status:
 - unincorporated bodies:
 - committees of clubs, associations, charities, etc
 - sole owner businesses:
 - formation and registration
 - simplicity of management
 - business partnership firms:
 - reasons for their formation
 - partnership agreements:
 - duties and responsibilities of partners
 - limited companies:
 - shareholders or stockholders
 - meaning of limited liability
 - incorporation and registration
 - parent companies:
 - separating event income and expenditure

Insurance for Events

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- Definition of an accident
- Risks, hazards and consequences
- Circumstances in which insurance cover is needed
- Types of insurance cover for events:
 - general public liability
 - employers liability
 - event equipment and property
 - cancellation or abandonment of an event
 - third-party damage
- Arranging events insurance:
 - directly with insurers
 - through insurance brokers
 - information which might need to be provided
 - the policy: sum insured, subject matter, exclusions
- Insurance and the law:
 - insurable interest
 - utmost good faith
 - indemnity: types of compensation
- Insurance claims charitable status:
 - fundraising activities
 - donations and corporate philanthropy
 - taxation and other advantages
- Sanctioning:
 - permission from a legal or governing body
 - lump sum fee or capitation fee
- Copyright:
 - moral or legal entitlement to have or do something
 - literary and artistic rights
 - assigning of rights
 - illegal use, copying and plagiarism
- Contracts and agreements:
 - legal enforceability
 - unrevoked offer and unconditional acceptance
 - acceptance of legality
 - consideration from both/all parties
 - terms and conditions
- An event's own contracts:
 - drawing up, wording and contents
 - terms and conditions
 - contracts with franchisees, performers, contractors
 - general guidelines for event organisers and managers
- Quotations for:
 - supply of goods and/or services
 - hire of equipment, furniture, marquees, etc
- Purchase orders
- Licences and permits:
 - common reasons why they might be required:
 - public entertainment
 - trading/market trading
 - sale of liquor/alcoholic beverages
 - gambling - raffles and games of chance

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- Performing rights:
 - royalty payments to copyright holders
 - Performing Rights Society
- Disability issues:
 - complying with the law on access and facilities

Module Nine - Event Logistics and Production

- Assessment of resources needed:
 - production equipment, facilities, services, personnel, time
 - allocating sufficient time for production
- Logistics in events:
 - ensuring the flow of resources into and out of a venue
- Factors in site or venue design:
 - anticipated size and demographics of audience
 - indoor or outdoor, seated or standing access
 - and infrastructure requirements
- Checklist for physical production resources
- Checklist for facilities and services
- Factors in site or venue layout:
 - capacity, features which might decrease it
- Access, egress and flow for vehicles and pedestrians:
 - dangers to avoid, pinch points, disabled access
 - vehicle/pedestrian intersections access for emergency vehicles
 - adequate space around concessions and WCs
- Sterile areas
- Ground conditions and site topography:
 - features to consider
 - assessment of weather conditions, contingency plans
- Existing site features: hills, gullies, trees, overhead cables
- Safe placement of equipment and services
- Sanitary facilities for men and women, disabled people
 - hand washing facilities
- Checklist for site or venue considerations
- Local residents; domestic and business:
 - advance meetings, keeping them in the picture
 - avoiding nuisances which can lose their goodwill;
 - congestion, noise, litter
- Need for clear signage:
 - directional, information, safety and warnings,
 - emergency, welfare, environmental
 - appropriate dimensions, design and placement
 - sponsors' signage or banners licences or
 - permits for signage display
- Checklist of facilities for the disabled and special needs groups
- Litter and waste management:
 - checklist of matters to be considered
- Site or venue plan or map:
 - why and by whom it is needed
 - features and facilities to be included

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developing the master plan
Communications:
a key logistical concern
mobile/cellphones, 2-way radio transmitters, runners
evolving a communications plan printed materials,
screen messages
public address announcements
emergency situations

Module Ten - Event Health and Safety

Categories of people to be protected:
persons employed by or working for or at the event:
full-time, part-time, trainees, volunteers
statutory legislation and legal liabilities
persons participating in an event:
attendees, spectators, visitors, guests
duty of care
persons who might be affected by:
excessive noise, vibration, congestion, noxious smells,
air pollution, and other forms of nuisance
Responsibilities of the event organisers or managers:
health and safety arrangements to control risks
Risk assessment:
identifying and reducing hazards and risks
taking all reasonable measures to control risks
appropriate management systems for each phase of an event
co-ordination of workers and work activities on site/venue
temporary demountable structures (TDS):
safe erection, siting and use, inspections
Crowd management:
event organisers' or manager's overall responsibility
typical hazards presented by a crowd
variety of hazards presented by the site/venue
Barriers and fencing:
typical purposes served at events:
perimeter, queuing, influencing crowd behaviour
preventing overcrowding and surging,
providing physical security, shielding hazards from people
considerations in using and placing barriers
Planning for incidents and emergencies:
taking account of key risks, contingency planning
consultation with local emergency services
incident report forms
The emergency plan
basic matters to be covered:
getting people away from the immediate danger
summoning emergency services handling
casualties
Emergency procedures:
raising the alarm, informing the audience

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- onsite emergency response, first aid and medical assistance
- crowd management
- evacuation of people with disabilities or mobility difficulties
- Evacuation:
 - planned escape routes, signage and lighting
 - ensuring exits are clear and available
- Show stop:
 - rapid and controlled halt to activities
 - preventing risks to the audience, initiating evacuation
 - liaison with key people involved
 - show stop procedures and announcements
- Transport on site:
 - reasons for movements into, through and out of the site/venue
 - keeping people and vehicles apart
 - adequate access and exit points, ring system
- Electricity:
 - major risks posed on site/venue
 - steps to be taken to reduce risks
- Health and safety signage:
 - warning, prohibition and instructional signs
- Customer logistics
- Importance of transport links to and from an event:
 - transportation logistics for events in rural settings
- Ticketing:
 - distribution, collection and security concerns
 - revenue from advance ticket sales
 - electronic and mobile issue of tickets, SMS text ticketing
- Queuing and queue management:
 - presentation of entry tickets on arrival
 - physical queuing: queue capacity, entertainment, signage
 - fast track queuing, premium payment virtual queuing via mobile/cellphones
- Exit strategies:
 - staggering exit times, hospitality quests
 - planning exits from events held in remote locations

Module Eleven - Event Marketing and Promotion

- Creating public awareness of an event
- Different media
- Market research: how best to promote an event
- Devising a marketing strategy:
 - taking account of unique challenges
- Situational analysis:
 - ascertaining the data on which to base strategy
- Formulating marketing strategy, considering:
 - budgetary constraints
 - time constraints
 - personnel constraints
- Identifying target markets:
 - the most likely target markets

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where the target audiences are or will come from
Building the audience database:
market analysis
market segments and demographics
comparisons with competitive events
Setting SMART marketing objectives:
specific, measurable, achievable, realistic, timely
practical example
Developing the marketing strategy:
positioning and characteristics
The marketing mix:
product, price, place, promotion - and people
Determining what an event offers
Cost of attending
Making attendance easy and convenient
Promotional campaigns:
getting the right message to the right people
Marketing tools:
printed materials, media advertising, the Internet
What makes an event newsworthy Sponsors and
promotion
Forms of paid advertising online
Using social media; encouraging "sharing"
Viral marketing
Audience research
Post event evaluation and reporting:
meetings and de-brief reporting, checklist
Planning for the next event

Module Twelve - Building Event Businesses

Entering the events industry:
finding a niche
whether to be a generalist or a specialist
preference for working with social, corporate or non-profit clients
preference for small or medium size events
Professional planning and organisation of:
weddings ceremonies and receptions
advice on venue, clothing, flowers, photography, catering
birthday parties:
venue, themes, decor, entertainment, catering
wedding anniversary celebrations:
venue, catering, renewal of wedding vows, flowers, decor, music
family events: engagement, going way, coming home parties, etc
types and sizes of meetings:
briefings, conferences, conventions, congresses, seminars
organiser's duties before, during and after meetings
Seating arrangements:
descriptions and illustrations of 10 popular layouts
The business venture:
characteristics of entrepreneurs

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reasons for venturing into business
business units: sole owner, partnerships, companies:
advantages and possible disadvantages of each
The business plan:
matters to be covered
What business capital is and why it is necessary
Possible benefits of working from home, disadvantages
Securing clients via:
family and friends, emails, texts, phone calls
using social media
designing and building a website, blogs
Importance of referrals from satisfied clients
Building a network of contacts
Developing goodwill
Building relationships with clients
Event organising and planning fee structures:
flat rate, percentage of expenses, hourly rate
Accounting records
Event business insurance cover and policies

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