
**Business Plan
for:**

(Event Name)

prepared by:

(Name(s) and Title(s) of Planners)

(Date Prepared)

approved by:

(Name of Governing Entity)

(Date Approved)

Executive Summary

The Executive Summary will likely be the last thing that you complete even though it is the first item in your business plan. Its intent is to provide a brief, but broad overview of the business plan and prepare the reader for the content ahead.

Purpose and Use of Plan

Summary of Plan

SWOT Analysis Template State what you are assessing here. Many listed criteria can apply to other quadrants, and the examples are not exhaustive. You should identify and use any other criteria that are appropriate to your situation.

<p>Examples</p> <p>Advantages of proposition? Capabilities? Competitive advantages? USPs (unique selling points)? Resources, Assets, People? Experience, knowledge, data? Financial reserves, likely returns? Marketing - reach, distribution, awareness? Innovative aspects? Location and geographical? Price, value, quality? Accreditations, qualifications, certifications? Processes, systems, IT, communications? Cultural, attitudinal, behavioral? Management cover, succession? Philosophy and values?</p>	<p>Strengths</p>	<p>Weaknesses</p>	<p>Examples</p> <p>Disadvantages of proposition? Gaps in capabilities? Lack of competitive strength? Reputation, presence and reach? Financials? Own known vulnerabilities? Timescales, deadlines and pressures? Cash flow, start-up cash-drain? Continuity, supply chain robustness? Effects on core activities, distraction? Reliability of data, plan predictability? Morale, commitment, leadership? Accreditations, etc? Processes and systems, etc? Management cover, succession?</p>
<p>Examples</p> <p>Market developments? Competitors' vulnerabilities? Industry or lifestyle trends? Technology development and innovation? Global influences? New markets, vertical, horizontal? Niche target markets? Geographical, export, import? New USPs? Tactics: e.g., surprise, major contracts? Business and product development? Information and research? Partnerships, agencies, distribution? Volumes, production, economies? Prepared by Penny C. McBride Seasonal, weather, fashion influences?</p>	<p>Opportunities</p>	<p>Threats</p>	<p>Examples</p> <p>Political effects? Legislative effects? Environmental effects? IT developments? Competitor intentions - various? Market demand? New technologies, services, ideas? Vital contracts and partners? Sustaining internal capabilities? Obstacles faced? Insurmountable weaknesses? Loss of key staff? Sustainable financial backing? Economy - home, abroad? Seasonality, weather effects?</p> <p>Source: www.businessballs.com Indigo Resource Group</p>

EVENT PROFILE

The Event Profile describes the event and its sponsoring organization, including historical data, purpose, theme and current status.

History of the Event

Description of the Sponsoring Organization (This may include organizational structure (i.e. non-profit, for profit), governance model, mission, overall body of work, etc.)

Purpose and Theme of the Event (What is the primary purpose of the event? Is there a specific theme? Why does the organization produce the event? How does the event benefit the organization and any other relevant stakeholders?)

Description of the Event (Provide a few paragraphs that provide a general overall description of the event, including target audiences, major activities, dates and location/venue.)

MARKET ANALYSIS

The Market Analysis provides a comprehensive view of the marketplace in which your event occurs. It should take into consideration competition, population density, potential customer base, communication channels, geographic variables and relevant local issues or trends.

Saturation Level of Events (How many other events exist in your geographic market place? How similar are they to your event? Does opportunity exist for partnerships with other events?)

RESEARCH SOURCES:

- www.fairsandexpos.com – comprehensive list of member fairs
- www.ifea.com – comprehensive list of member festivals
- www.festivals.com – free listing of festivals and events nationwide, searchable by date, location and theme
- Your local Convention & Visitors Bureau or Chamber of Commerce
- Regional Travel Councils

Other Competition Sources (List and analyze all other competitors for your customers' entertainment dollars)

Population Composition (Describe the population characteristics of your geographical marketplace and key target markets including population density, demographic profile, etc.)

Communication Channels (What opportunities exist for you to communicate with your target audience? What media outlets exist?)

Relevant Local Trends/Issues (List any social or political issues that do or can affect your event.)

PROGRAM PLAN

The Goals and Objectives section of your business plan should detail at least three goals to accomplish with this year's festival/event and how those goals will be accomplished. A goal should be measurable with objectives and action steps to take to accomplish the goal.

Goal #1

Objective(s) of Goal #1

Goal #2

Objective(s) of Goal #2

Goal #3

Objective(s) of Goal #3

PROMOTIONAL PLAN

The marketing plan should outline all plans to promote the event, both using paid and unpaid marketing mechanisms.

Target Audience(s)

Current Audience

Potential Audience

Means of Gathering Customer Information (What methods are used to gather market research for your event? Outline any existing research and your strategy to incorporate what you know about your customers in all marketing elements.)

Advertising (Paid Print/Radio/TV/Internet)

Publicity (Unpaid Print/Radio/TV)

Online Promotions (Strategy for all web-based promotions including production of event website, utilization of online communities such as MySpace and Facebook, electronic ticketing-merchandise sales or couponing, text messaging services, etc.)

Printed Materials & Mail Outs (List of all printed materials planned and production schedule for each outlining deadlines for photography and other artwork, copy, digital production, proofing, printing and shipping.)

Media Sponsorships (Outline of media assets received as part of any media sponsorship arrangement, along with strategy on how these assets will be utilized.)

Promotional Partnerships (Outline of any cooperative promotional opportunities with sponsors, other events, local tourism promotion agencies, tour/travel wholesalers, local hospitality partners, etc.)

Miscellaneous Promotional Items (List of any promotional items needed to fulfill event's promotional plan along with ordering and production deadlines for each.)

MANAGEMENT PLAN

The Management Plan should include all aspects of how the event will be managed or administered including organizational structure, staffing, volunteer leadership and general volunteers.

Event Organizational Structure (Describe the organization's legal structure including tax status, date of incorporation, any assumed names, date of fiscal year, address of record, etc.)

Governing Board (Describe the structure, governance model, responsibilities and selection process for the organization's board of directors.)

Paid Staff (List all paid staff positions with a brief description of their responsibilities and interaction with volunteers.)

Committee Chairs and Responsibilities (List all committee chairs and provide a description of their responsibilities.)

Volunteer Needs (Create an inventory of volunteer staffing needs and list of required volunteer skills. Describe the organization's plan for volunteer recruitment and retention.)

OTHER MATERIALS TO INCLUDE:

- Organizational Chart
- Staff Job Descriptions
- Volunteer Staff Descriptions
- Board Member Guidelines
- Conflict of Interest Statement
- Committee Checklists/Timelines

LOGISTICAL PLAN

The Operations or Logistical Plan should include all aspects of how the event will operate including a site plan, setup, take down, maintenance, safety and security, equipment, etc.

Site Plan (Include a scale drawing of your grounds layout and relevant narrative.)

Event Setup and Take Down (Outline timeline, required staff, volunteers, service providers and equipment needed to set-up and tear-down the event.)

Safety and Security (Describe all areas of safety and security including coordination with local law enforcement and emergency management agencies, private security, evacuation plan, crisis management and communication plans, lost child procedure, identification of minors, sanitation procedures, electrical safety, carnival set-up/inspection, trap/fall hazards, disposal of gray water.)

Handicapped Accessibility (Outline equipment, improvements, staffing and training needed to make the event as accessible as possible to all attendees.)

Equipment, Supplies and Services (List all equipment, supplies and services that will be needed to operate the event. Include timelines for ordering and production of specialty products. Create a list of all providers, contact names and 24/7 phone numbers. Include timeline of when equipment is needed and the required return date, if rented or borrowed.)

Insurance and Permitting (Outline all insurance and permit requirements for your event, including timeframe and procedure for requesting necessary permits. Also outline any insurance requirements you have of entertainers and equipment or service providers.)

OTHER MATERIALS TO INCLUDE:

- Site Plan
- Contact list for all emergency service agencies
- Equipment and Service Provider Contact List
- Copies of required permits or insurance certificates
- Crisis communication scripts and media contacts

COMMUNITY RELATIONS PLAN

This section should include a strategy for keeping all key stakeholders informed and in support of the event.

Community Involvement/Communication Plan (Outline specific strategies to invite community participation in your event. Think in terms of year-round involvement to keep interest high.)

Mitigation of Undesirable Effects (Describe efforts the event will make to reduce the adverse effects of traffic congestion, street closures, restriction of public venues, limited access to businesses, noise and feelings of local displacement.)

SPONSORSHIP PLAN

The sponsorship plan describes your events sponsorable assets, values those assets and packages them into desirable sponsor products.

Sponsorable Assets (List, in detail, all activities, areas, services and products that your event controls.)

Valuation of Assets (Outline your research showing the “value” –not cost- of these assets.)

Sponsor Prospect List (List potential sponsors, including the features and benefits you can provide and what you seek in return.)

Solicitation Plan (Describe your strategies for understanding sponsor needs, developing packages of benefits and rights, and conducting sales activities to sponsors.)

Sponsor Activation (List all services and benefits promised to sponsors and plan for delivery of all activation requirements.)

FINANCIAL PLAN

The Financial Plan covers both short-term and long-term financial needs.

Short-Term Financial Goals (Broadly define the event's immediate financial goals.)

Long-Term Financial Goals (List goals and timeline for financial needs in the next 3-5 years.)

Non-Sponsorship Revenue (Outline all other fundraising activities or sources of additional revenue.)

Distribution of Proceeds (Description of how proceeds are used and what they benefit.)

EVALUATION PLAN

This section of the plan post-event evaluation needs to be used to improve future planning.

Key Audiences (List all individuals and groups that should be included in the evaluation process.)

Evaluation Procedure (Describe the systems and processes that will be used to seek constructive evaluation following the event.)

Additional Resources

For more information on Peter Drucker's Self-Assessment tool and implementation guidelines:
<http://www.leadertoleader.org/tools/sat/materials-consultants.html>

To view the largest online library of event-related titles:
http://ifea.com/zencart/index.php?main_page=products_all

Websites offering article and templates on non-profit management (including board recruitment, selection, and performance expectations)
www.nonprofitexpert.com
www.managementhelp.org

Tips on business plan development
<http://www.sba.gov/smallbusinessplanner/plan/writeabusinessplan/index.html>

Reading List

Blue Ocean Strategy by W. Chan Kim and Renee Mauborgne
Excellent book on how to reposition your product to create a class of your own.