

ILEA Educational Discipline Content Outlines

The Purpose of the Educational Discipline Content Outlines

The intention of the following discipline outlines is to provide consistent educational frameworks for learning about the special events industry, presented in a standardized format, with content that has been identified and vetted by industry experts within each discipline and which allow for local variations while adhering to international standards. Chapters are encouraged to use these content outlines as a resource to assist a speaker or in the creation of a presentation on an industry topic or to develop a program based around an event discipline.

These content outlines will continue to expand in detail over time and additional categories will be added annually based on the work of the ILEA Education Council.

How to Use the Discipline Outlines

It is important to understand that the focus of ILEA education is not on teaching someone how to do their job (teach a florist to be a better florist) but to educate cross functionally, so that a planner or a tent professional can be better informed on the processes a florist uses in creating flowers and centerpieces for an event, so that they may be better in working collaboratively on an event project.

Each outline has been written from a 10,000-foot perspective, looking in at an event professional working in the stated outline field. Each outline follows the format of all of the steps an event professional working in the stated outline field could/would/should follow from the point at which they are contacted by a client from a client and through the development, pre-production, production, and post-production phases of the event planning process

These content outlines are thus intended to serve as guides for speakers and chapter programs on industry topics. These outlines provide the bullet points or talking points for consideration and inclusion in an ILEA educational program. They are not intended necessarily to be covered in their entirety in a single session; indeed an ILEA educational program may only deal with one or two bullets within a category. These outlines represent simply the approved ILEA educational content as relevant to each event element or job function outlined.

These outlines are a RESOURCE: share them with speakers, use them in your planning of chapter programs, be inspired by them to create new learning opportunities for chapter members and help us improve them and identify new content outlines needed through your use of them!

Educational Discipline Outline Definitions

Outlines are provided for the following special event disciplines:

Event Planning: Established from the ILEA point of view as the standard of practice for the event planning processes, the CSEP outline is being utilized as the educational content outline for this category at this time.

Entertainment: The Entertainment Content Outline identifies the steps, procedures, processes required for entertainment professionals to do their job effectively. Whether working with a talent agent, booking agent direct or as an entertainment professional working in the events industry, this outline identifies all of the high-level interactions necessary with various members of the event team to ensure the successful production of entertainment at an event.

Creative Services: The Creative Services Outline covers at a high-level the many creative categories of professionals working in the Special Events Industry, including: Event Designers, Marketing Professionals, Graphic Designers, Content Creators, Photographer, etc. This outline identifies all of the steps, procedures, processes and high-level interactions with various members of the event team required to ensure the successful creation and production of creative services for an event.

Rentals: The Rentals Support Services Outline explores the steps, procedures, processes and high-level interactions with members of the event team for a rental service event professional to effectively provide support services for an event. This category includes professionals who provide tables, chairs, linens, tents, staging, kitchen and service ware, portable restrooms and/or any other rental support services required for an event.

Tenting: As a specified sub-category of the Rentals Content Outline, the Tenting Outline provides more detailed information specifically about the steps, procedures and processes a Tenting professional performs in order to provide tents and temporary structures for an event.

Food and Beverage: The Food and Beverage Support Services Outline explores the steps, procedures, processes and high-level interactions with members of the event team a food and beverage service professional performs in order to provide those services for an event. This content outline covers the work of Catering Professionals including Off-Premise Caterers, On-Premise Caterers, Event/Food Service Staff, Drink/Beverage Specialist, Bakeries / Wedding Cake Specialist and others involved in providing food and beverage services.

Event Décor: The Event Décor Content Outline explores the steps, procedures, processes and high-level interactions required for an event decorator to successfully perform their job function at an event. This outline looks at event décor specifically as integrated, but separate from design (see Creative Services) and focuses on the many event décor specialties and service providers include Decorating / Props / Scenery professionals, Florists, Balloons and Inflatable companies.

Technical Production: The Technical Production Support Services Outline covers event professionals working in the audio visual and technical production industry. This content outline covers the work of audio, lighting, video, staging, and content and/or visual graphic design content all necessary for the execution of a meeting or event.

Speaker Management: A subset of the Entertainment Content Outline, this document explores the steps and procedures necessary for an event professional tasked with managing a speaker or speakers for a conference, meeting or event.

Venue: The Venue Content Outline covers the steps and procedures a venue or location personnel would do in their job to help facilitate a meeting or event on their property.

EVENT PLANNING

Event Planning: Established from the ILEA point of view as the standard of practice for the event planning processes, the CSEP outline is being utilized as the educational content outline for this category at this time.

THE CSEP CONTENT OUTLINE	
DEVELOPMENT PHASE (28%)	
A.	Determine purpose of event and prioritize goals and objectives
B.	Identify event strengths, weaknesses, opportunities, and threats (SWOT analysis)
C.	Identify site requirements
D.	Define scope of work, identify event elements, and assess available resources (e.g., technical production, food and beverage, entertainment, décor)
E.	Develop event concept
F.	Determine need for ancillary components (e.g., virtual/hybrid events, companion programs, exhibits)
G.	Define and develop integrated marketing plan (e.g., situation analysis, marketing objectives, target markets, messages, and measure Return on Marketing Investment (ROMI))
	1. Identify and develop promotional strategy (e.g., advertising, web site, sales promotions, and contests)
	2. Identify and develop social engagement strategies (e.g., mobile and interactive technology, social media)
	3. Identify and develop direct sales strategy (e.g., box office and ticket operations, souvenirs, and promotional merchandise)
	4. Identify and develop public relations strategy (e.g., media releases, requests for coverage, photo opportunities, media relations, publications, event publicity, and public guest appearances)
	5. Identify and develop sponsorship program (e.g., sponsorships, donors, grants, and gifts)
H.	Identify and develop sustainability strategies (e.g., corporate, social, and environmental)
I.	Identify protocol and ceremonial needs and develop protocol plans as required (e.g., dignitaries, government and other officials, cultural and religious practices)
J.	Conduct a risk/safety assessment and analysis
K.	Develop event design
L.	Ensure event complies with all federal, provincial, and state legislation and local ordinances
M.	Ensure event complies with labor union jurisdictions and regulations
N.	Determine proper insurance coverage (e.g., liability, event insurance, additional insurance)
O.	Develop an initial budget
P.	Prepare and present a proposal
Q.	Initiate contractual agreements.
PRE-PRODUCTION PHASE (35%)	
A.	Execute contractual agreements
B.	Reassess available resources (e.g., vendors, funds, people) and time restrictions

C.	Implement record keeping procedures (e.g., accounting, project management)
D.	Create time lines, including pre-production calendar and production schedules
E.	Establish event evaluation criteria
F.	Select an appropriate site and develop a site plan
G.	Review, select, negotiate and execute necessary event partner agreements, contracts, leases, and other legal documents
H.	Define structure of responsibility pertaining to event management and staffing (e.g., organizational chart)
I.	Oversee communications with and between all involved parties (e.g., status reports, budget updates)
J.	Determine logical sequence of show or event flow
K.	Coordinate event element requirements
	1. Site services (e.g., parking, waste management, capacity, power, telecommunications, and floorplan)
	2. Entertainment (e.g., riders, talent booking, blocking)
	3. Ground transportation (e.g., manifests, shuttle service, valet)
	4. Travel and accommodations (e.g., flights, room blocks)
	5. Food and beverage (e.g., alcohol management, catering, guarantees)
	6. Technical production (e.g., audio/visual, lighting, technical rehearsal)
	7. Rentals (e.g., determining orders, guarantees, delivery and setup)
	8. Décor (e.g., scenery, props, floral)
	9. Risk/safety management (e.g., security, contract liability, fire marshal, crowd control)
	10. Guest services and protocol (e.g., accessibility, translation, hospitality)
	11. Creative services and media production (e.g., photography, videography, show content, presentation, scripting)
	12. Collateral material (e.g., signage, invitation, brochures, promotional items, gifts)
	13. Staffing (e.g., recruitment, training, motivation, and evaluation of personnel and volunteers)
	14. Ancillary components (e.g., excursions, companion programs, virtual/hybrid events)
	15. Marketing, public relations, and social engagement strategies (e.g., press area, event publicity, sponsorship)
	16. Shipping and receiving (e.g., drayage, trucking, courier service)
	17. Sustainability strategies (e.g., social responsibility)
L.	Ensure event complies with copyright licensing regulations and other intellectual property rights
M.	Secure all necessary insurance coverage, licenses, permits, waivers, and other compliance instruments and documentation
N.	Devise contingency and response plans
O.	Conduct pre-event production meetings and personnel/participant orientations
PRODUCTION PHASE (26%)	
A.	Implement production schedule
B.	Conduct pre-event inspection and execute load-in
C.	Set event space locations (e.g., front of house, back of house)
D.	Employ communication systems (e.g., methods of communication, communication protocol)
E.	Implement risk monitoring and control systems (e.g., contingency and response plans and safety procedures)
F.	Ensure conceptual and contractual compliance of event

G.	Implement show or event flow
H.	Respond to and document incidents and changes (e.g., incident reports, change orders, signed authorizations)
I.	Execute load-out and conduct post-event inspection
POST-PRODUCTION PHASE (11%)	
A.	Determine event success utilizing event evaluation criteria
B.	Analyze and evaluate entire event management process
C.	Audit and reconcile finances and present final budget (e.g., final invoices/billing, financial reports, profit and loss)
D.	Archive information (e.g., legal documentation, media documentation, samples)
E.	Ensure full compliance with contractual obligations (e.g., equipment return, payment schedules)

ENTERTAINMENT

Entertainment: *The Entertainment content outline identifies the steps, procedures, processes required for entertainment professionals to do their job effectively. Whether working with a talent agent, booking agent direct or as an entertainment professional working in the events industry, this outline identifies all of the high-level interactions necessary with various members of the event team to ensure the successful production of entertainment at an event.*

Development Phase

- A. Develop a complete understanding of the scope of the event
 - a. Meet with your hiring client to understand the event's purpose, vision, the messages the client wishes to communicate to their audience and the type of experience the client wishes for their audience to share
 - b. Discuss and agree to measurable goals and objectives on which the event entertainment can be successfully measured
 - c. Understand the event audiences' demographics to prepare for unique audience needs or discover gaps/opportunities in the current event plans
 - d. Meet with your client's event designer and/or production companies to understand strengths and weaknesses of the creative concepts for the event, the event designs, or production and technical elements which will affect or generate entertainment needs
 - e. Consider the economic, social and environmental impacts of creative decisions (i.e. noise levels, cultural acceptability of the entertainment form, etc.)
 - f. Understand the technical, legal, union/labor, and production limitations for providing entertainment at the event based on the event specifications
 - g. Identify intersecting opportunities or challenges for use of entertainment with event marketing, public relations, and sponsorship for/of the event
 - h. Identify matters of protocol and how they relate to the entertainment needs of the event
- B. Develop an overall entertainment strategy for the event
 - a. Determine if entertainment is required or appropriate for the event
 - b. Assess what type of entertainment options would best fit the goals and objectives for the event; consider the audience demographics for the event
 - c. Consider the event elements (i.e. location, time, audience, type, etc.) to determine the right entertainment solutions
 - d. Conduct a risk assessment of preferred, recommended, or requested entertainment solutions
 - e. Generate a list of entertainment solutions
 - f. Ensure entertainment concepts comply with all federal, state, province, regional, city or local laws and ordinances
 - g. Understand any permitting responsibilities and requirements for as well as insurance requirements for use of entertainment at the event
 - h. Create measurement strategies/outcomes for measuring the success of the entertainment at the event
- C. Create or acquire from your client an entertainment budget

- D. Review entertainment options and select entertainment best suited to the event; present entertainment concepts, solutions and plans to the hiring client for approval
- E. Initiate and execute proper legal contracts with your hiring client

Pre-Production Phase

- A. Engage in early communication between your hiring client and other members of the event/planning team: event designer, technical/production team and, when relevant, entertainment contractor/booking agent or talent management to introduce the team and establish clear hierarchy of decision making and communication
- B. Obtain and read the entertainment rider; share the rider with relevant sub contractors and service providers under your management for the event:
 - a. Understand specific technical requirements and requests listed in the rider
 - b. Understand specific food and beverage requirements and requests listed in the rider; communicate early with food and beverage service provider to ensure all requirements and requests can be met, including dietary restrictions and/or allergies; communicate food and beverage service requirements for rehearsals and entertainment production staff during the load-in, event and dismantle; segregate food for entertainment from crew meals and guests as required by the rider
 - c. Understand requirements for audio and visual components of entertainment production including but not limited to size of stage, backstage requirements, lighting requirements, audio requirements, provision/procurement of backline gear, sound checks and timeline
 - d. Understand the artists requirements and requests around meet and greet opportunities, autograph signing, security needs, parking and transportation, hotel rooms, green room/dressing room set-up and location, and merchandise sales; negotiate special requests (i.e. meet and greet, photo opportunities, recording or videotaping of the performance, sales of merchandise, etc.) into the contractual agreements between the client and entertainers
 - e. Understand and communicate any custom entertainment requirements and related costs; establish these requests early through open communication with the management/artists to ensure feasibility
 - f. If questions or special requests arise, communicate early between client/producers and entertainment agent/manager/artist to communicate necessary changes/amendments/requests and approve such changes in writing
- C. Assess technical and production needs for selected entertainment and engage with necessary sub contractors or additional resources to provide for the technical production elements required, including backline gear, lighting specifications, stage design requirements, special effects, speaker requirements, etc.
- D. Initiate and execute proper legal documents required for entertainment at the event
 - a. Initiate and execute proper legal contracts with selected entertainment solutions upon complete review of rider and technical requirements as well as any required sub contractors and vendors; understand rights of rental use, condition of items and return procedures
 - b. Initiate process to obtain proper insurance coverage for entertainment supplied for the event; get and exchange insurance documentations with your

- client per the terms of the contract; with sub-contractors per the term of the contract
- c. Understand who is responsible for what permits and licensing for the entertainment; obtain any required permits required for the entertainment, including entertainment insurance, music licensing, fireworks permits etc. in a timely fashion
- d. Review music licensing requirements and obtain necessary clearances and use rights from ASCAP, BMI, or other required sources
- e. Determine appropriate payment terms and processes; schedule of payments for any subcontracted work
- E. Through the appropriate channels, establish lines of communication or a clear distribution of event entertainment plans and performance schematics (i.e. required stage footprint for dance performance, stage plot for instruments, speakers, monitors for the hired entertainment on stage, green room layouts, any waste that might be generated (confetti), etc.) among entertainment, event rentals, design/décor and food and beverage service providers to ensure proper attention is paid to event timing, food and beverage requirements and decorative materials, such as flags, banners, floral arrangements, backdrops, draping, podiums, lighting instruments, etc. placed on/around the stage or entertainment performance area and/or in the audience and access the risks attached to each of these functions
- F. Coordinate in the creation of the event production schedule with your client to ensure proper timing for entertainment elements
 - a. Coordinate efforts among event vendors and any additional entertainment sub contractors to maximize efficiencies on site
 - b. Discover shared resource opportunities (i.e. lift rentals, rigging, lighting, etc.) to provide resource and financial saving and increase efficiencies onsite
 - c. Ensure the production schedule is as inclusive as possible and appropriately liberal in allowing necessary time for set-up, staging and rehearsal of the entertainment elements
 - d. Ensure the production schedule is as inclusive as possible and appropriately liberal in allowing necessary time for load-out of the entertainment elements
 - e. Distribute the production schedule to all included entertainment service providers and sub contractors under your management for feedback and incorporate necessary changes to ensure a smooth installation, execution and dismantle of the entertainment elements
- G. Based on the created production schedule and your understanding of the event, schedule appropriate labor for the set-up, staging, rehearsal, performance and dismantle of the event's entertainment elements, paying attention any pertinent union and labor laws discovered in your pre-production process
- H. Maintain and manage the entertainment budget and establish/communicate through the chain of command changes requiring budget consideration
- I. When required for headline entertainment, devise a security plan including onsite security personnel, transfer security personnel, stage barriers, identification devices and coordinate distribution plan with your hiring client, necessary vendors, onsite security providers and entertainment
- J. Devise contingency plans for entertainment elements and services to minimize risk, including communication and response plans for changes prior to and onsite

- K. Conduct a pre-event meeting with the event team and all entertainers and entertainment service providers to review necessary plans, site layouts, production schedules, schematics and risk management plans

Production Phase

- A. Complete a pre-event walk-through of the venue, noting its state of condition and any damage prior to the arrival of event decor elements and services
- B. Facilitate necessary introduction among members of the event team and the client(s); distribute clearance/security passes when required
- C. Establish onsite lines of communication and decision making for on site issues, changes, enhancements or problems/emergencies
- D. Initiate the entertainment portion of the production schedule for the event; manage to this schedule ensuring equal access for the staging, rehearsal and performance of the event's entertainment as well as intersecting opportunities for shared efforts and resources
- E. Establish and maintain required entertainment performance and backstage spaces, including stages, front and back of house locations, auxiliary performance areas, green rooms and entertainment transition/pathways, entrances and exits
- F. Ensure all supplied technical, audio visual and staging meets safety requirements; ensure all entrances/exits and pathways are clear and accessible, ensure all supplied items are provided in good and working condition; instruct the client or a pre-determined onsite contact on the operating procedures and safety requirements for any powered or technical onsite decor items if staff is not required to hired to stay through the event to operate
- G. Communicate with entertainment and production teams to ensure the coordination of intersecting efforts and the safe installation of rigging, lighting, audio, décor, special effects and hanging entertainment
- H. Manage and execute sound checks and rehearsal requirements for entertainment performances
- I. Ensure conceptual and contractual compliance in the entertainment production of the event, including local union/labor requirements
- J. Following the event, continue to manage to the production schedule of the event through the dismantle phase, ensuring a safe and proper load out of all entertainment acts and services
- K. Return the venue to its original state of condition, paying specific attention to green room and backstage spaces utilized by entertainment performers

Post-Production Phase

- A. Analyze the entertainment solutions utilized at the event through client, guest, entertainment and vendor feedback; hold a post-event entertainment debrief
- B. Follow-up on any issue related to entertainment which arose at the event with the appropriate client(s)/vendors
- C. Ensure compliance with entertainment related contractual commitments, including a financial audit of the entertainment budget and reconciliation of all final/outstanding bills and payments
- D. Archive any necessary elements generated by the event

CREATIVE SERVICES

Creative Services: *The Creative Services Outline covers at a high level the many creative categories of professionals working in the Special Events Industry, including: Event Designers, Marketing Professionals, Graphic Designers, Content Creators, Photographer, etc. This outline identifies all of the steps, procedures, processes and high-level interactions with various members of the event team required to ensure the successful creation and production of creative services for an event.*

Development Phase

- A. Develop a complete understanding of the scope of the event
 - a. Meet with your hiring client to understand the event's purpose, vision, the messages your client wishes to communicate to their audience and the type of experience the client wishes for their audience to share
 - b. Research the history of the event or similar events the event buyer/end client has produced
 - c. Research any previously defined goals and objectives for the event; if not defined, work with the client to establish a list of goals and objectives for the event
 - d. Establish the measurement strategy for determining the success of the event and its creative elements, including critical success factors, ROI criteria, expected outcomes, measurement techniques, and identify responsible parties for measuring success
 - e. Identify the key decision makers on the client side of the project, seeking decision makers, influencers, content creators and content owners who will have a stake in the event process and creative decisions; establish an approvals workflow for creative decision making/use of logos or other copyrighted materials
 - f. Understand the event's target audience, including their demographics to prepare for unique audience needs and experiences, as well as live, hybrid and digital or social media preferences and requirements for engagement and discover gaps/opportunities in the current event plans
 - g. Consider the events timing, seasonality, location, and venue to assess opportunities and threats for design and creative services elements
- B. Capture a list of all of the required elements necessary for the event; establish or discover the presumed flow of the event function
 - a. Understand any necessary protocol expectations, rules and requirements that generate creative design solutions or requirements
 - b. Understand the technical, legal, union/labor and production opportunities and limitations for creating or providing design elements and creative services for the event
 - c. Consider economic, social and environmental impacts of creative decisions
 - d. Ensure all design concepts comply with all federal, state, province, regional, city, or local laws and ordinances
- C. Within the list of elements required for the event, identify opportunities for creative services which will enhance the event and support the client's goals and objectives

- a. Establish the need for technical creative services required for the event including pre- and post-event technology solutions, live event video or pre-recorded video elements, lighting effects, live event streaming, internet connectivity, social media applications and audience engagement strategies, speaker support, scripting, motion or still graphic elements or presentation collateral, etc.
- b. Establish the need for the marketing/collateral creative services required for the event, including invitations, event collateral, event marketing materials, graphic design elements, etc.
- c. Discover any existing brand guidelines for logo use, client branding, event branding, sponsorship logo and branding use and manage to these guidelines throughout the creative process
- d. Identify any intersecting opportunities with event marketing, public relations or sponsorship that will generate event design requirements (branded decor, environmental branding, graphic elements, etc.)
- D. Generate event design or creative services concepts which capture your discovered knowledge and support the established goals and objectives for the event
- E. Generate an event design or creative services budget
- F. In the case of bidding for a project, communicate with your prospective hiring client a statement of creative intellectual property or initiate a letter of intent to identify and protect creative capital, ideas and solutions through the bidding process
- G. Present creative concepts, solutions and plans to the hiring client for approval
- H. Initiate and execute proper legal contracts with your hiring client

Pre-Production Phase

- A. Continue to flush out creative ideas alongside with your client through brainstorming sessions and concept presentations
- B. Based on the event's goals and objectives, solidify the event concept and key creative elements to be used for the event; determine which elements may require multiple formats or alternative versions for post-event utilization Work with your sub-contractors or creative team to ensure real life application of creative concepts
 - a. Visit the event venue to identify potential challenges in the installation or execution of creative elements and solutions
 - b. Discover creative event service providers who can provide technical, digital, graphic design, and build custom design elements for the event
 - c. Meet with event service providers to ensure availability of equipment, and technical staff to install, execute and dismantle the desired creative solutions for the event
 - d. Develop contingency plans and creative alternatives as necessary to minimize risk, including a communication plan and chain of command for onsite communication and decision making
- C. Initiate and execute proper legal documents for creative services for the event
 - a. Determine and establish proper terms within all contracts identifying a statement of work, contractual timing, and payment terms for service
 - b. Specify design ownership guidelines; manage intellectual property ownership with your client (i.e. who owns creative ideas/has rights of use throughout the process and post event?)
 - c. As applicable, get and exchange insurance documentations with your client per the terms of the contract

- d. As necessary initiate and execute confidentiality terms or agreements with your hiring client or sub contractors and creative service providers working on the project
 - e. Establish who is responsible for necessary use approvals, licensing or permits required creative design elements and services; obtain any necessary licenses, approvals or permits in a timely fashion
- D. Present your client with a full event design proposal
- a. Establish the event flow including all experiential elements
 - b. Identify all of the areas where the creative concepts interacts with event elements: rentals and décor, food and beverage service, marketing elements, collateral, entertainment and audio visual production services
 - c. Present an event floor plans/site plans and schematics to document all event decor elements and services, validating compliant spacing of tables and chairs, sight lines, exits and entrances, fire exits, emergency egress access, power, etc.; include load-in and load-out paths, and storage spaces; obtain any required approvals from both client and local jurisdictions (i.e. Fire Marshall)
 - d. Provide representations of event elements, including samples, storyboards, photos, renderings, technical information, swatches, etc., to ensure the client understands exactly what they are purchasing
 - e. If not previously established, create a brand guide for the event including colors, fonts, logos and graphic elements
 - f. Provide an updated and accurate event design/creative elements budget
- E. Establish a timeline for event design elements including key milestones for creative presentations, samples, required approval processes and production of creative elements
- F. Establish a timeline for marketing and collateral elements which includes key milestones for creative presentations and samples, content collection and due dates, required approval processes, production and distribution
- G. Establish a timeline for event marketing and public relations efforts, as applicable, which includes key milestones for element creation, required approval processes, production and distribution
- H. Establish a timeline for technical creative elements, including event video content pre-, during or post event; include sufficient timing and key milestones for creation, production, including conceptual development, pre-production (i.e. scripting, casting, scheduling, etc.), production and post-production (editing, soundtracks, music clearance, voice over, etc.), required approval processes and distribution of content through determined channels
- I. Establish a timeline for digital creative elements, including electronic collateral, video content and digital experiences pre-, during or post event; include sufficient timing and key milestones for creation, production, including conceptual development, digital design, pre-production, production and post-production, testing/viewing, required approval processes and distribution of content through determined channels
- J. When required by the creative design, establish a team of creative service providers and sub-contractors
- a. Communicate with the service team to share the creative concepts
 - b. Establish a plan to ensure consistency of creative concepts across mediums and throughout sub contractors' produced efforts

- c. Initiate proper and legal contracts with any sub-contractors for specified work, including payment terms, insurance provisions, licensing, copyright, permitting and approval processes
- K. Work with your client to establish a client management team be in communication with additional event service providers, such and food and beverage service providers, technical production service providers, entertainment producers, etc, to ensure clear communication of the event design and compliance across mediums of the creative concept
- L. Coordinate in the creation of the event production schedule with your client and creative team to ensure proper timing for the event set-up, execution and strike
 - a. Coordinate efforts among event vendors and any additional sub-contractors to maximize efficiencies onsite
 - b. Discover shared resource opportunities (i.e. lift rentals, rigging, lighting, etc.) to provide resource and financial saving and increase efficiencies onsite
 - c. Ensure the production schedule is as inclusive as possible and appropriately liberal in allowing necessary time for set-up of all creative elements
 - d. Ensure the production schedule is as inclusive as possible and appropriately liberal in allowing necessary time for load-out of all creative elements
 - e. Distribute the production schedule to all included décor service providers and sub contractors under your management for feedback and incorporate necessary changes to ensure a smooth installation, execution and dismantle of the event décor elements
- M. Maintain and manage the event design/creative services budget and establish/communicate through the chain of command changes requiring budget consideration
- N. Conduct a pre-event meeting with the client, creative services team and all creative service providers to review necessary plans, site layouts, production schedules, schematics and risk management plans

Production Phase

- A. Utilizing the timelines of creative elements manage the creative process ensuring production and distribution of all creative service elements in a timely manner
- B. Working with the creative team, client and/or sub contractors, ensure the delivery of creative service elements and their compliance to the creative concept and relevant brand guidelines; ensure proper approval processes are adhered too
- C. For digital or print event marketing and collateral, validate correct content and ease of use/functionality for event guests to view, reply, communicate or interact with the client/service provider
- D. Initiate any pre-event client, staff, or audience communication and promotion strategies through necessary channels
- E. Once onsite, facilitate necessary introduction among members of the creative team, event team and the client
- F. Establish onsite lines of communication and decision making for on site issues, changes, enhancements or problems/emergencies.
- G. Ensure conceptual and contractual compliance in the installation, execution and dismantle of the event design and creative service elements for the event
- H. Execute any onsite measurement strategies established during the development and pre-planning phases

- I. Manage any/all sub contractors on site to ensure contractual compliance and proper, professional installation, execution and dismantle of all creative event elements
- J. Establish and execute a plan for dismantle of any creative visual elements, determining what should be returned to proper owners and what as waste can be recycled or disregarded; establish who is responsible for clean-up of event collateral, signage and visual elements
- K. Oversee the execution of the creative elements of the event

Post-Production Phase

- A. Following the event, initiate any post-event communication strategies or creative solutions
- B. Analyze the success of the event through the identified measurement strategies established in the development phase
- C. Meet with the client for a post-event debrief; offer constructive feedback for future events as relevant, success measurement data and analysis of the event in terms of the goals and objectives created at the start of the event
- D. As relevant, seek any opportunities for reuse/recycling of event materials or created solutions/collateral to create lasting value for the client, guests, and/or community
- E. Return created collateral, photos, digital files, videos and creative elements to proper owners as established in the contracts written during the pre-production phase, distribute copies to the event team and client for archive purposes
- F. Follow-up on any issues of relevance to the event design and/or creative service elements which arose at the event with the appropriate client/vendors
- G. Ensure compliance with any/all contractual commitments, including a financial audit of the budgeted creative service elements and reconciliation of all final/outstanding bills and payments
- H. Archive all created collateral and event documentation

RENTALS

Rentals: *The Rentals Outline explores the steps, procedures, processes and high-level interactions with members of the event team for a rental service event professional to effectively provide support services for an event. This category includes professionals who provide tables, chairs, linens, tents, staging, kitchen and service ware, portable restrooms and/or any other rental support services required for an event.*

Development Phase

- A. Develop a complete understanding of the scope of the event
 - a. Meet with your client to understand the event's purpose, vision, the messages the client wishes to communicate to their audience and the type of experience the client wishes for their audience to share
 - b. Discuss and agree with your client to measurable goals and objectives on which the event's rental services can be successfully measured
 - c. Understand the event audiences' demographics to prepare for special needs or discover gaps/opportunities in the current event plans
 - d. Meet with your client's event designer and/or production companies to understand the creative concepts for the event, event designs, or production and technical elements
 - e. Consider the event's timing, seasonality, location, and venue to assess gaps and opportunities for rental elements or requirements
 - f. Conduct a risk assessment of preferred, recommended, or required rental solutions
- B. Understand the technical, legal, union/labor and production opportunities and limitations for providing event rental support for your client's event
- C. Identify any intersecting opportunities with event marketing, public relations or sponsorship that will generate rental support requirements (i.e. branded rental elements, environmental branding, graphic design, etc.)
- D. Understand any necessary protocol expectations, rules and requirements that generate rental support requirements (i.e. event security, private entrances, stage/room layouts, etc.)
- E. Ensure all rental support concepts and requirements comply with all federal, state, province, regional, city, or local laws and ordinances
- F. Consider the economic, social and environmental impacts of rental support services and element decisions
- G. Understand event rental insurance and permitting responsibilities and requirements
- H. Generate an event rentals budget
- I. Present rental support concepts, solutions and plans to the hiring client or determined decision maker (i.e. event designer) for approval
- J. Initiate and execute proper legal contracts with your hiring client

Pre-Production Phase

- A. Initiate and execute proper legal documents required for event rental services at the event

- a. Initiate and execute proper legal contracts with any required sub contractors and vendors; understand rights of rental use, condition of items and return procedures
 - b. Initiate process to obtain proper insurance coverage for the event in terms of rentals; get and exchange insurance documentations with your client per the terms of the contract; with sub-contractors per the term of the contract
 - c. Understand who is responsible for permits for event rental support elements and services; obtain any necessary permits in a timely fashion
 - d. Determine appropriate payment terms and processes; schedule of payments for any subcontracted work
- B. Engage in early communication with members of the event planning team: the client, the event designer, technical/production team, venue, food and beverage service provider, entertainment producer, and any additional event rental support service providers to introduce the team and establish a clear hierarchy of decision makers and communication
- C. Visit the event venue to obtain a clear understanding of the event location:
- a. For indoor venues: Explore the load-in and load-out path, from the arrival location of a truck, including the dock and the journey through the venue to the event location, noting doorways, corridors, lifts, freight elevators, steps and staircases, ceiling height, dock heights and depths, and any additional necessary or unique information about the event venue which will affect the use of rental equipment or elements.
 - i. Learn the power requirements for the event venue, where power is available, and if there is an additional cost to access power; if there is an additional cost to access wireless internet as applicable to rental support solutions
 - ii. Explore exits and entrances, understanding the venues approved evacuation plans in case of an emergency
 - iii. Explore the event flow to understand how guests may move through the event, from arrival to exit noting opportunities or challenges for rental support services
 - iv. Discover solutions for onsite storage of rental support equipment; discover onsite or near site parking and storage opportunities for rental service trucks and equipment during the event
 - v. Communicate with food and beverage service provider to understand rental requirement necessities for supplement kitchen space, power requirements, or catering needs (i.e. linens, service ware, glassware, etc.)
 - vi. Discover, if provided, table and chair options at the venue to select appropriate linens or chair covers
 - vii. Understand venue limitations, including use of balloons, open flame policies, attaching to walls, hanging of banners or visual décor in public spaces, load-in/load out requirements/timing/dock limitations, rigging ability, etc.
 - viii. Understand venue policies around labor or additional charges which the client may incur for the use of rental items (i.e. use of approved vendors)
 - ix. Understand noise and traffic congestion, parking limitations, and any inconveniences the event may cause to others on or offsite as well as any

inconveniences other activities, events or venue operations will have on the event

- b. In the case of an outdoor venue, explore the path for load-in and load out of the event in terms of rental support, ensure what size trucks are permitted, noting bridges, narrow paths, sidewalks, steps and staircases, weight limitations, dirt roads, etc; make additional plans for delivery in case of inclement weather
 - i. Understand back-up venue locations and limitations for change in case of inclement weather and the event's relocation
 - ii. Discover the needs for barricades to create the event space; learn about any special permitting relevant to rental support required for an outdoor event
 - iii. Discover and address weighting and staking options for inflatables, signage or other rental structures
 - iv. Based on discovered load-in and load-out paths, determine best methods (carrying or wheeling) as well as the number of staff and time needed to move rental service items into the event site or storage locations
 - v. Explore outdoor power opportunities and challenges as required for the event
 - vi. Explore waste and recycling management options
 - vii. Determine security requirements to keep rental items secure onsite
 - viii. Explore challenges which may require additional rental support solutions to meet ADA requirements
 - ix. Understand the venues approved evacuation plans in case of an emergency
 - x. Explore the event flow to understand how guests may move through the event, from arrival to exit seeking opportunities or challenges for rental support services
 - xi. Discover solutions for onsite storage of rental support equipment; discover onsite or near site parking and storage opportunities for rental service trucks and equipment during the event
 - xii. Discover water access as required for food and beverage service, floral décor needs and the possibility of filling water barrels for tent structures
 - xiii. Explore venue restroom options and determine the necessity for additional restrooms to be provided
 - xiv. Communicate with food and beverage service provider to understand rental requirement necessities for tenting, sanitation and disposal, supplement kitchen space, power requirements, or catering needs (i.e. linens, service ware, glassware, etc.)
 - xv. Discover, if provided, table and chair options at the venue to select appropriate linens or chair covers
 - xvi. Understand venue limitations, including use of balloons, open flame policies, attaching to walls, hanging of banners or visual décor in public spaces, load-in/load out requirements/timing/dock limitations, rigging ability, etc.
 - xvii. Understand venue policies around labor or additional charges which the client may incur for the use of rental items (i.e. use of approved vendors)
- c. In the case of Tent use:

- i. Understand the legal requirements and permitting requirements within the relevant jurisdictions for the use of tent at the event venue
 - ii. Communicate with the event venue to understand approved tenting plans for the event location
 - 1. Discover if tenting is allowed at the event venue
 - 2. Discover any unusual geographic challenges required to overcome to install a tent at the event location
 - 3. Discover ability to deliver and assemble the desired size tent at the event location
 - 4. Check for any underground power lines, gas lines etc. that would pose significant challenges to installation of a tent at the event location
 - 5. Understand if you are allowed to stake or weight a tent at the event location and the availability of a water or other source for tent weighting barrels
 - iii. Determine the appropriate size tent required to accommodate your clients events, considering the correct event type for the clients needs and desires
 - iv. Determine the necessity of event flooring to support the tent and any requirements for the event; create appropriate and legal/ADA compliant entrance and exits for the tents
 - v. Determine the need for auxiliary tents for food and beverage, restrooms, coat check, valet, registration, and any other various event elements
 - vi. Determine the heating/air conditioning and venting needs for the event tent
 - vii. Determine the necessary contingency plans in case of inclement weather (i.e. sidewall, additional marquee tents, back-up event site, etc.) as well as the appropriate hierarchy of decision making for tent modifications in case of weather
 - viii. Determine and communicate power requirements, ability to use power within the tent if needed as well as rigging opportunities and challenges for the event within the tent
 - ix. Communicate the timing required to set-up and strike the tent as part of the events production schedule
- D. Engage the entertainment producer to understand any required rental support for event speakers or entertainment, including green room furniture and décor, dressing room supplies, and/or food and beverage service rental needs
 - E. Engage with the event production company/producers to understand any required rental support for the production space; coordinate rental support elements, such as staging, draping, furniture, special effects, production masking, lighting, etc., with technical installation and rehearsal schedules; additionally coordinate the dismantle schedules for these technical production support elements
 - F. Communicate with the food and beverage service providers any onsite requirements for staff and crew meals, or beverage service during event load-in, execution and dismantle
 - G. Devise contingency plans for rental support elements and services to minimize risk, including communication and response plans
 - H. Create event floor plans/site plans and schematics to document all event rental elements and services, validating compliant spacing of tables and chairs, exits and entrances,

power; include load-in and load-out paths, and storage spaces; obtain any required approvals from both client and local jurisdictions (i.e. Fire Marshall)

- I. Coordinate in the creation of the event production schedule with your client to ensure proper timing for event rental elements
 - a. Coordinate efforts among event vendor and any additional rental support sub contractors to maximize efficiencies on site
 - b. Discover shared resource opportunities (lift rentals, rigging, lighting, etc.) to provide resource and financial saving and increase efficiencies onsite
 - c. Educate your client on typical gaps or pitfalls in the creation of the production schedule as relevant to the rental support elements of the event (i.e. if you install the stage prior to the lighting, you won't be able to get a lift in to rig the lights, etc.)
 - d. Ensure the production schedule is as inclusive as possible and appropriately liberal in allowing necessary time for set-up of the event
 - e. Ensure the production schedule is as inclusive as possible and appropriately liberal in allowing necessary time for load-out of the event
 - f. Create a dock schedule for all vendors providing appropriate windows of time for delivery and pick-up of rental service elements
 - g. Distribute the production schedule to all included rental service providers and sub contractors under your management for feedback and incorporate necessary changes to ensure a smooth installation, execution and dismantle of the event, in terms of rental support requirements
- J. Based on the created production schedule and your understanding of the event, schedule appropriate labor for the installation, execution and dismantle of the event in terms of rental support requirements, paying attention any pertinent union and labor laws discovered in your pre-production process
- K. Communicate across event decor and food and beverage service suppliers onsite responsibility plans; understand all elements which will be on dining tables, and who is responsible for what elements of set up or strike (i.e. setting linens, lighting candles, striking linens and napkins, etc.)
- L. Understand who is responsible for permits for event rental support elements and services; obtain any necessary permits in a timely fashion
- M. Maintain and manage the rental support services budget and establish/communicate through the chain of command changes requiring budget consideration
- N. Conduct a pre-event meeting with the event team and all rental support service providers to review necessary plans, production schedules, schematics and risk management

Production Phase

- A. Complete a pre-event walk-through of the venue, noting its state of condition and any damage prior to the arrival of rental elements and services
- B. Facilitate necessary introduction among members of the event team and the client(s)
- C. Establish onsite lines of communication and decision making for on site issues, changes, enhancements or problems/emergencies
- D. Initiate the rental support services portion of the production schedule for the event; manage to this schedule ensuring equal access for the installation, and execution of the event and intersecting opportunities for shared efforts and resources
- E. Execute a dock schedule for load-in and load out of rental elements

- F. Execute the floor plan ensuring proper installation of all rental elements
- G. Manage sub contractors to understand onsite where they have access to water, food and beverage, if provided, secure storage, and power for their elements
- H. Ensure all supplied rental support elements are provided in good and working condition; instruct the client or a pre-determined onsite contact on the operating procedures and safety requirements for any powered or technical onsite rental items if staff is not required to hired to stay through the event to operate
- I. Communicate with the event designer and technical production teams to ensure the coordination of intersecting efforts and the safe installation of rigging, lighting, special effects and hanging décor
- J. Ensure any sub contracted staging, large décor and technical elements meets safety requirements; ensure all entrances/exits and pathways are compliant, clear and accessible
- K. Ensure conceptual and contractual compliance in the installation, execution and dismantle of the rental support elements and services for the event, including local union/labor requirements
- L. Following the event, continue to manage the production schedule of the event through the dismantle phase, ensuring a safe and proper load out of all rental elements and services
- M. Check all rental items noting any conditional changes (i.e. wax on linens, broken rental décor, etc.) which may incur additional charges and notify the client
- N. Return the venue to its original state of condition

Post-Production Phase

- A. Return any rental items in their original or required return condition per initiated contracts
- B. Analyze the success of the rental elements and services at the event through client, guest, and vendor feedback; hold a post-event debrief
- C. Follow-up on any issue related to event rentals which arose at the event with the appropriate client(s)/vendor
- D. Ensure compliance with event rental related contractual commitments, including a financial audit of the rental elements and services budget and reconciliation of all final/outstanding bills and payments
- E. Archive event details and collateral as necessary for documentation purposes

TENTING

Tenting: *As a specified sub-category of the Rentals Content Outline, the Tenting Outline provides more detailed information specifically about the steps, procedures and processes a Tenting professional performs in order to provide tents and temporary structures for an event.*

Development Phase

- A. Develop a complete understanding of the scope of the event
 - a. Meet with your client to understand the event's purpose, vision, the messages the client wishes to communicate to their audience and the type of experience the client wishes for their audience to share
 - b. Discuss and agree to measureable goals and objectives on which the event's tenting services can be successfully measured
 - c. Understand the event audiences' demographics to prepare for special needs, handicapped guests, or discover gaps/opportunities in the current event plans
 - d. Meet with your client's event designer and/or production companies to understand the creative concepts for the event, event designs, or production and technical elements
 - e. Consider the events timing, seasonality, location, and venue to assess gaps and opportunities to establish tenting requirements
 - f. Conduct a risk assessment of proposed, preferred, recommended, or required tenting solutions
- B. Communicate with and/or visit the event venue to understand approved tenting plans for the event location
 - a. Discover if tenting is allowed at the event venue
 - b. Discover any unusual geographic challenges required to overcome to install a tent at the event location
 - c. Discover external threats: overhead power lines, trees, street lamps, adequate egress means between the tent and other permanent buildings on property, etc., which could affect the delivery, installation, existence and/or strike of the tent
 - d. Discover ability to deliver and assemble the desired size tent at the event location
 - e. Check for any underground power lines, gas lines etc. that would pose significant challenges to installation of a tent at the event location
 - f. Understand if you are allowed to stake or weight a tent at the event location
 - g. Identify the appropriate type, size, and style of tent for the event based on the event site
- C. Understand the technical, legal, union/labor and production opportunities and limitations for utilizing tents for the event
- D. Consider the economic, social and environmental impacts of tent installation decisions
- E. Identify any intersecting opportunities with event marketing, public relations or sponsorship that will affect tent requirements (i.e. event branding on the tent, visual concepts, etc.)
- F. Identify the needs for auxiliary tents at the event for guest arrival, food and beverage service, restrooms, sponsors, special guests, event security, reasons of protocol, other vendor tent requirements, in case of weather, etc.

- G. Identify the needs for tent support services including flooring, air conditioning/heating, venting, doors, windows, staging, masking, specialty décor, lighting, etc.
- H. Ensure all tenting concepts and requirements comply with all federal, state, province, regional, city, or local laws and ordinances
- I. Understand insurance and permitting responsibilities and requirements for the use of tents at the event
- J. Generate a tenting budget
- K. Present tenting concepts, solutions and plans to the hiring client or determined decision maker (i.e. event designer) for approval
- L. Initiate and execute proper legal contracts with your hiring client

Pre-Production Phase

- A. Initiate and execute proper legal documents required for use of tents at the event
 - a. Initiate and execute proper legal contracts with any required sub contractors and vendors; understand rights of rental use, condition of items and return procedures
 - b. Initiate process to obtain proper insurance coverage for the use of a tent at this event; get and exchange insurance documentations with your client per the terms of the contract; with sub-contractors per the term of the contract
 - c. Understand who is responsible for permits for the tenting elements and services provided; obtain any necessary permits in a timely fashion
 - d. Determine appropriate payment terms and processes; schedule of payments for any subcontracted work
- B. Engage in early communication with members of the event planning team: the client, the event designer, technical/production team, venue, food and beverage service provider, entertainment producer, and any additional event rental support service providers to introduce the team and establish a clear hierarchy of decision makers and communication
- C. Visit the event site to obtain a clear understanding of the event location:
 - a. Explore the path for load-in and load out of the event in terms of rental support, ensure what size trucks are permitted, noting bridges, narrow paths, sidewalks, steps and staircases, weight limitations, dirt roads, etc; make additional plans for delivery in case of inclement weather
 - b. Validate the appropriate size tent required to accommodate your client's event, considering the correct tent type/style for the client's needs and desires in coordination with the location details and limitations
 - c. Discover the needs for barricades to create the event space
 - d. Explore the event flow to understand how guests may move through the event site/tent(s), from arrival to exit seeking opportunities or challenges for additional tent support services
 - e. Discover solutions for onsite storage of tent support equipment; discover parking solutions for trucks and extra tent equipment onsite or near the event site during the event
 - f. Establish a trash/waste disposal and recycling management plan for the event site
 - g. Validate the ability to stake or weight tents at the event site; as required, discover onsite water sources for water barrel tent weights

- h. Validate the necessity of event flooring to support the tent and/or requirements for the event; create appropriate and legal/ADA compliant entrance and exits for the tents
 - i. Validate the requirements for auxiliary tents for food and beverage service, restrooms, coat check, valet, registration, and any other various event elements, including their location on the site plan
 - j. Validate the heating/air conditioning and venting needs for the event tent
 - k. Validate restroom plans at the event site and any tent requirements for portable restrooms
 - l. Determine the necessary contingency plans in case of inclement weather (sidewall, additional marquee tents, back-up space) as well as the appropriate hierarchy of decision making for tent modifications in case of weather
 - m. Determine and communicate power requirements, ability to use power within the tent if needed and rigging opportunities and challenges for the event within the tent
 - n. Determine and communicate staffing levels the timing requirements to set-up and strike the tent as part of the events production schedule
- D. Generate contingency and security plans to minimize risk for the duration of the event from the start of installation through the dismantle of the tent
- a. Establish the need for onsite security of the tent during installation, the event and dismantle
 - b. Understand back-up venue locations and limitations for change in case of inclement weather and then event's relocation
 - c. Understand the venues approved evacuation plans in case of an emergency
 - d. Establish a communication chain of command for onsite decision making and emergency situations
- E. Engage conversation with the event production company/producers to understand any required tenting support for the production space, coordinating rental support elements – staging, draping, furniture, special effects, production masking, lighting – with technical installation and rehearsal schedules; additionally coordinate the dismantle schedules for event décor, rental and technical production support elements with the dismantle plans for the tent(s)
- F. Engage conversation with the event designer, food and beverage service team, rental and décor suppliers and/or client to determine any potential fire hazards (i.e. candles, décor, cooking equipment, electrical equipment, etc.) and establish a plan for protecting guests from those hazards
- G. Communicate with the food and beverage service providers any onsite requirements for staff and crew meals, or beverage service during event load in, execution and dismantle
- H. Prepare event floor plans/site plans and schematics to document all tent elements in coordination with event rental elements and services, validating compliant spacing of tables and chairs, exits and entrances, power; include load-in and load-out paths, and storage spaces
- I. Ensure the site plan is reviewed and validated by the necessary decision makers according to legal requirements and permitting requirements within the relevant jurisdictions for the use of tent at the event venue; validate the site plan by the appropriate fire marshal

- J. Coordinate in the creation of the event production schedule with your client to ensure proper timing for tenting elements
 - a. Coordinate efforts among event vendors and any additional tenting support sub contractors to maximize efficiencies on site
 - b. Discover shared resource opportunities (i.e. lift rentals, rigging, lighting, etc.) to provide resource and financial saving and increase efficiencies onsite
 - c. Educate your client in terms of typical gaps or pitfalls in the planning of the production schedule as relevant to the tenting elements and solutions
 - d. Ensure the production schedule is as inclusive as possible and appropriately liberal in allowing necessary time for set-up of the tent(s) at the event site
 - e. Ensure the production schedule is as inclusive as possible and appropriately liberal in allowing necessary time for load-out of the tent(s) at the event site
 - f. Distribute the production schedule to all included tenting service providers and sub contractors under your management for feedback and incorporate necessary changes to ensure a smooth installation, execution and dismantle of the tent(s) requirements for the event
- K. Based on the created production schedule and your understanding of the event, schedule appropriate labor for the installation, execution and dismantle of the tents required for the event, paying attention any pertinent union and labor laws discovered in your pre-production process
- L. Maintain and manage the tenting budget and establish/communicate through the chain of command changes requiring budget consideration
- M. Conduct a pre-event meeting with the event team to review necessary site plans, production schedules, schematics and risk management plans

Production Phase

- A. Complete a pre-event walk-through of the event site, noting its state of condition and any damage prior to the installation of the tent(s)
- B. Facilitate necessary introduction onsite among members of the event team and the client(s)
- C. Establish onsite lines of communication and decision making for on site issues, changes, enhancements or problems/emergencies
- D. Initiate the tenting portions of the production schedule for the event; manage to this schedule ensuring equal access for the installation, and execution of the event and intersecting opportunities for shared efforts and resources
- E. Manage to the site plan ensuring proper installation of all tent elements and support services
- F. Manage tenting sub contractors to understand onsite where they have access to water, food and beverage, if provided, secure storage, and power for their elements
- G. Ensure all supplied tent elements are provided in proper and professional condition (good, clean and working)
- H. Ensure conceptual and contractual compliance in the installation, execution and dismantle of the tent(s) and tenting services for the event, including local union/labor requirements
- I. Communicate with the event designer and technical production teams to ensure the coordination of intersecting efforts and the safe installation of rigging, lighting, special effects and hanging décor within the tent(s)

- J. Ensure any sub contracted staging, large décor and technical elements meet safety requirements; ensure all entrances/exits and pathways are compliant, clear and accessible
- K. Following the event, continue to manage the production schedule of the event through the dismantle phase, ensuring a safe and proper load out of all tent(s)
- L. Check all tent parts noting any conditional changes which may incur additional charges and notify the client
- M. Return the event site to its original state of condition

Post-Production Phase

- A. Return any sub-contracted items in their original condition per initiated contracts
- B. Analyze the success of the tent(s) for the event through client, guest, and vendor feedback; participate in a post-event debrief
- C. Follow-up on any issue related to the tent(s) which arose at the event with the appropriate client(s)/vendors
- D. Ensure compliance with tent related contractual commitments, including a financial audit of the rental elements and services budget and reconciliation of all final/outstanding bills and payments
- E. Archive any necessary event details, diagrams, and created collateral/documentation

FOOD AND BEVERAGE

FOOD AND BEVERAGE: *The Food and Beverage Outline explores the steps, procedures, processes and high-level interactions with members of the event team a food and beverage service professional performs in order to provide those services for an event. This content outline covers the work of Catering Professionals including Off-Premise Caterers, On-Premise Caterers, Event/Food Service Staff, Drink/Beverage Specialist, Bakeries / Wedding Cake Specialist and others involved in providing food and beverage services.*

Development Phase

- A. Develop a complete understanding of the scope of the event
 - a. Meet with your client to understand the event's purpose, vision, the messages the client wishes to communicate to their audience and the type of experience the client wishes for their audience to share
 - b. Discuss and agree to measurable goals and objectives on which the event's food and beverage services can be successfully measured
 - c. Understand the event audiences' demographics to prepare for special needs and requirement for food and beverage service and to discover gaps/opportunities in the current event plans
 - d. Discover the event timeline for food and beverage service to understand required event flow
 - e. Meet with your client's event designer and/or production companies to understand the creative concepts for the event, event design elements, or production and technical elements
 - f. Consider the events timing, seasonality, location, and venue to assess gaps and opportunities for local sourcing of food supplies and rental needs or requirements necessary to execute a food and beverage plan for the event
 - g. Conduct a risk assessment of preferred recommended, or required food and beverage solutions
 - h. Determine appropriate service style (i.e. American, Russian, French, Traditional Buffet, etc.)
 - i. Determine staffing needs required to meet client expectations
- B. Understand the technical, legal, union/labor and production opportunities and limitations that can affect food and beverage service for the client's event (i.e. access to power, vendor limitations for a specific venue, who is permitted to serve alcohol, etc.)
- C. Consider the economic, social and environmental impacts of food and beverage decisions
- D. Identify any intersecting opportunities with event marketing, public relations or sponsorship that will generate food and beverage service requirements (i.e. sponsorship signage on bars, signature drinks or food items, etc.)
- E. Understand any necessary protocol expectations, rules and requirements that affect food and beverage service (i.e. order of service, service etiquette, etc.)
- F. Ensure all food and beverage service concepts comply with all federal, state, province, regional, city, or local laws and ordinances (i.e. ability to serve alcohol at a specific event location, etc.)

- G. Understand permitting responsibilities and requirements for service of food and beverage at a given event location or site
- H. Generate a food and beverage service budget
- I. Present food and beverage service concepts, solutions and plans to the hiring client or determined decision maker (i.e. event producer) for approval
- J. Initiate and execute proper legal contract with your hiring client

Pre-Production Phase

- A. Initiate and execute proper legal documents required for food and beverage service and production
 - a. Initiate and execute proper legal contracts with any required sub contractors and vendors; understanding any special or specific requirements in terms of delivery or onsite storage
 - b. In the case of sub rentals (china, dishes, kitchen equipment, bars, etc.) understand rights of rental use, condition of items and return procedures
 - c. Initiate process to obtain proper insurance coverage for the event in terms of rentals; get and exchange insurance documentations with your client per the terms of the contract; with sub-contractors per the term of the contract
 - d. Determine appropriate payment terms and processes; schedule of payments for any subcontracted work
- B. Engage in early communication with members of the event planning team, the client, the event designer, technical/production team, venue, rental support suppliers, entertainment producer, and any additional food and beverage service providers to introduce the team and establish a clear hierarchy of decision makers and communication
- C. Meet with the chef and appropriate staff responsible for the creation and service of food and beverage service for the client's event; explain the event concepts, client's goals and objectives and expectations
- D. For onsite catering:
 - a. Ensure the in-house policies and procedures including all required permits are up to date and enforced
 - b. Ensure onsite equipment is working properly
 - c. Ensure the kitchen environment is clean and meets any required standards for service (i.e. Kosher etc.), all in order to provide for successful execution of food and beverage requirements for the client's event
 - d. Understand the waste and recycling processes available for waste management during the event
- E. For offsite catering, visit the event venue to obtain a clear understanding of the event location:
 - a. For indoor venues: Explore the load-in and load-out path, from the arrival location of a truck, including the dock and the journey through the venue to the event location, noting doorways, corridors, lifts, freight elevators, steps and staircases, ceiling height, dock heights and depths, and any additional necessary or unique information about the event venue which will affect food and beverage service.
 - i. Learn the power requirements for the event venue, where power is available, and if there is an additional cost to access power
 - ii. Explore exits and entrances, understanding the venues approved evacuation plans in case of an emergency

- iii. Explore the event flow to understand how guests may move through the event, from arrival to exit seeking opportunities or challenges for food and beverage service
 - iv. Discover solutions for onsite storage of food and beverage equipment and supplies; find secure storage solutions for alcohol or any other items which may need to be secured prior to or during the event
 - v. Evaluate and determine proper food and beverage transportation to the event site and discover onsite or near site parking opportunities for food and beverage service trucks, trailers or equipment during the event
 - vi. Assess disposal plans for waste bussing and disposal during preparation, service and post event; if not allowed to dispose of waste onsite, create a plan for waste management or bring in a waste management sub contractor
 - vii. Explore onsite preparation space; ensure security and cleanliness, access to water and storage
 - viii. If the event site provides food and beverage service preparation equipment (i.e. cooking stoves, sinks, etc.) ensure such equipment meets appropriate standards, are clean and large enough to handle the capacity work required for food and beverage service for the event.
 - ix. In the case of onsite cooking, ensure proper ventilation or outdoor access for the use of grills or stoves; if utilizing hotboxes, design a space layout which encompasses all equipment, but ensure clear pathways, access, and exit paths through the space
 - x. Communicate with the rental service provider(s) to coordinate rental requirement necessities for supplement kitchen space, power requirements, or catering needs
 - xi. Understand venue limitations, including open flame policies, service requirements in public spaces (i.e. cannot serve alcohol in an art gallery space or on a new hardwood floor, etc.) and load-in/load out requirements/timing/dock limitations, etc.
 - xii. Understand venue policies around labor or additional charges that the client may incur for food and beverage service (i.e. venue corkage fees, cake cutting fees, etc.)
 - xiii. Determine special staff instructions, including access, parking, security, rest room, break area and smoking area/policy
- b. In the case of an outdoor venue, explore the path for load-in and load out of the event in terms of rental support, ensure what size trucks are permitted, noting bridges, narrow paths, sidewalks, steps and staircases, weight limitations, dirt roads, etc.; make additional plans for delivery in case of inclement weather
- i. Understand back-up venue locations and limitations for change in case of inclement weather and the event's relocation
 - ii. Discover the needs for barricades or tents to create the preparation and service space; learn about any special permitting relevant to rental support required for an outdoor event; in the case of installation of tents, work with a qualified event professional to follow the regulations and requirements for installation of a tent
 - iii. Explore outdoor power opportunities and challenges as required for food and beverage preparation and service

- iv. Understand the venues approved evacuation plans in case of an emergency
 - v. Explore the event flow to understand how guests may move through the event, from arrival to exit seeking opportunities or challenges for food and beverage service
 - vi. Discover solutions for onsite storage of food and beverage service equipment and supplies; find secure storage solutions for alcohol or any other items which may need to be secured prior to or during the event
 - vii. Evaluate and determine proper food and beverage transportation to the event site and discover onsite or near site parking opportunities for food and beverage service trucks, trailers or equipment during the event
 - viii. Assess disposal plans for waste, bussing and disposal during preparation, service and post event; if not allowed to dispose of waste onsite, create a plan for waste management or bring in a waste management sub contractor
 - ix. Explore onsite preparation space; ensure security and cleanliness, access to water and storage; required ground cover and/or overhead canopy protection/restrictions
 - x. Communicate with the rental service provider(s) to coordinate rental requirement necessities for supplement kitchen space, power requirements, or catering needs
 - xi. Understand venue limitations, including open flame policies, service requirements in public spaces and load-in/load out requirements/timing/dock limitations, etc.
 - xii. Understand venue policies around labor or additional charges that the client may incur for food and beverage service (i.e. venue corkage fees, cake cutting fees, etc.)
 - xiii. Evaluate special staff instruction such as access, security, parking restrooms, break area and smoking area/policy
- F. Create a process with the client to collect and manage food allergies and special food requests for guests attending the event
 - G. Understand and plan for any local rules, regulations and ordinances around the serving of alcohol within a venue, within a jurisdiction and ensure all necessary permitting and insurance is obtained prior to the event
 - H. Coordinate with the rental and/or event décor service provider(s) to determine catering décor requirements (i.e. specialty décor, flowers, etc.) for bars, buffets, and reception presentation; coordinate arrangement for required rental support needs including linens, table skirting, display décor, glassware, service ware, plates, unique or custom service trays, etc.
 - I. If specialty bars are being provided, coordinate beverage service needs with the event designer or client to ensure the custom bars provide adequate space and functionality for successful beverage service inclusive of bar back requirements
 - J. In reception style events, coordinate with your client a plan and process for bussing food and beverage service items (i.e. plates, glasses, etc.) when guests are finished; determine if servers will clear throughout the event and ensure collection points for guests to leave service ware; in the case of disposables, ensure proper waste receptacles are available for guest's access

- K. When special effects (i.e. dry ice in cocktails, flambé, etc.) or specialty display items (i.e. ice luges, ice serving stations, heat lamps, etc.) are being used for food and beverage service, ensure proper policies are followed to maintain safety for staff and guests; inclusive of permitting, open flame rules and regulations, proper drainage plans in the case of ice carvings and safe use of heat lamps or heating equipment to prevent accidental burns from guests accessing food stations, buffets or carving stations
- L. Coordinate with the technical production team/supplier to ensure their technical site plan accounts for and assigns proper lighting and dedicated power supply for food stations and buffets, bars and food service and preparation space; note the color choices for lighting gels and how it may affect food and beverage displays, consider bar or food station placement in relationship to audio speakers to ensure service staff can effectively communicate with guests and account for the coordination of any technical special effects which may impact food and beverage service (i.e. trajectory of confetti cannons in relationship to food stations; balloon drops over buffet stations, etc.)
- M. Understand if the client requires documentation of the food and beverage elements or service for the event by the event photographer or videographer; coordinate with these vendors to manage timing and expectations
- N. Engage the entertainment producer to understand any required food and beverage service support for event speakers or entertainment, including green room, backstage and onstage requirements
- O. Engage with the event production company/producers, to understand and coordinate onsite staff and crew meals, breaks and beverages (i.e. times, quantities, style of service, and menus, etc.); communicate with sub contractors and event support suppliers to include their needs and requirements
- P. Create detailed food and beverage service menus encapsulating all service requirements throughout the event, including details of style of service, timing, and special requirements (i.e. type of plate for each course to be served on, protocol requirements, servers should remove the table numbers once guests are seated, etc.)
- Q. When possible, consider green and recyclable food and beverage Service opportunities and waste management procedures; when applicable and appropriate per local restrictions and ordinances, create a plan for distribution of extra food within the community to cut down on waste
- R. Coordinate in the creation of the event production schedule with your client to ensure proper timing for event rental elements
 - a. Coordinate efforts among event vendors and any additional food and beverage service sub contractors to maximize efficiencies on site
 - b. Discover shared resource opportunities (i.e. in-house décor services, in-house pastry chef, ice carvers, etc.) to provide resource and financial saving and increase efficiencies onsite
 - c. Educate your client in terms or typical gaps or pitfalls in the creation of the production schedule as relevant to the food and beverage service elements of the event (i.e. Events require one bartender to every 75-100 guests; Food may sit on a buffet for x length of time safely, etc.)
 - d. Ensure the production schedule is as inclusive as possible and appropriately liberal in allowing necessary time for food and beverage service deliveries and set-up at the event

- e. Ensure the production schedule is as inclusive as possible and appropriately liberal in allowing necessary time for load-out of food and beverage service elements
- f. Participate in the creation of a dock schedule for all vendors providing appropriate windows of time for food and beverage service delivery and pick-up
- g. Distribute the production schedule to all included food and beverage service providers and sub-contractors under your management for feedback and incorporate necessary changes to ensure a smooth installation, execution and dismantle of the event, in terms of rental support requirements
- S. Based on the created production schedule and your understanding of the event, schedule appropriate labor for the preparation, delivery, set-up, execution and dismantle of the food and beverage service for the event, paying attention any pertinent labor laws discovered in your development and pre-production process
- T. Devise contingency plans for food and beverage service elements and services to minimize risk, including communication and response plans
- U. Understand who is responsible for permits for food and beverage service at the event; obtain any necessary permits in a timely fashion
- V. Communicate across rental and event decor service suppliers onsite responsibility plans; understand all elements which will be on dining tables, and who is responsible for what elements of set up or strike (i.e. setting linens, lighting candles, striking linens and napkins, etc.)
- W. Maintain and manage the food and beverage service budget and establish/communicate through the chain of command changes requiring budget consideration
- X. Conduct a pre-event meeting with the food and beverage service team and staff to review necessary plans, production schedules, service requirements and risk management plans
- Y. Communicate with *all* staff if uniforms/costumes are required; reconfirm event timing, driving directions and parking instructions.
- Z. Collect from the client final food counts, including any allergies and special requirements at the appropriate time prior to the event according to the terms of the executed contract

Production Phase

- A. Complete a pre-event walk-through of the venue, noting if any changes have arisen and mapping out all planned access paths, points of entry and service paths remain open and clear; that there have not been onsite changes made which will affect food and beverage service
- B. Facilitate necessary introduction among members of the food and beverage service staff and the client(s)
- C. Establish onsite lines of communication and decision making for on site issues, changes, enhancements or problems/emergencies
- D. Initiate the food preparation and beverage set up portions of the production schedule for the event
- E. Initiate food and beverage service, supervising proper style, service etiquette and bussing.
- F. Manage any food and beverage sub contractors to ensure onsite needs are met, they have access to water, preparation space, secure storage if provided, and power for their elements

- G. Complete a safety check of all food and beverage service equipment which was rented in for the event or provided by the venue to ensure it is in working condition
- H. Complete a cleanliness check of the food and beverage preparation, plating and service space ensuring it meets the highest cleanliness and safety standards
- I. Communicate with service staff the food and beverage service plan for the evening communicating all necessary details regarding protocol, style of service, specialty service items, menu, specialty drinks and job assignments including:
 - a. Set-up assignments
 - b. Service assignments
 - c. Bussing assignments
 - d. Tear down assignments
- J. Ensure all service entrances/exits and pathways are compliant, clear and accessible
- K. Ensure conceptual and contractual compliance in the preparation, plating, service and strike of the food and beverage elements and services for the event
- L. Following the event, continue to manage to the production schedule of the event through the dismantle phase, ensuring a safe and proper waste disposal and load out of all food and beverage service elements
- M. Clean all surfaces in preparation space, specialty or rental bars, areas of food service within the event venue or accidental spills during or after the event
- N. Check all rental items noting any conditional changes (i.e. wax on linens, broken rental supplies etc.) which may incur additional charges and notify the client/supplier
- O. Return the venue to its original state of condition

Post-Production Phase

- A. As/if applicable return any food and beverage service rental items in their original or required return condition per initiated contracts
- B. Analyze the success of the food and beverage service at the event through client, guest, and vendor feedback; hold a post-event debrief and pass along to the client constructive feedback for future events and service facts (how many beverages were consumed, how many meals were served, results from a waste-recycle program, etc)
- C. Follow-up on any issue related to food and beverage service which arose at the event with the appropriate client(s)/vendors
- D. Ensure compliance with contractual commitments, including a financial audit of the food and beverage service budget and reconciliation of all final/outstanding bills and payments
- E. Archive any created collateral or event details for documentation purposes

EVENT DECOR

EVENT DECOR: *The Event Décor Content Outline explores the steps, procedures, processes and high-level interactions required for an event decorator to successfully perform their job function at an event. This outline looks at event décor specifically as integrated, but separate from design (see Creative Services) and focuses on the many event décor specialties and service providers include Decorating / Props / Scenery professionals, Florists, Balloons and Inflatable companies.*

Development Phase

- A. Develop a complete understanding of the scope of the event
 - a. Meet with your client to understand the event's purpose, vision, the messages the client wishes to communicate to their audience and the type of experience the client wishes for their audience to share
 - b. Discuss and agree to measurable goals and objectives on which the event's décor can be successfully measured
 - c. Understand the event audiences' demographics to prepare for unique audience needs or discover gaps/opportunities in the current event plans
 - d. Meet with your client's event designer and/or production companies to understand strengths and weaknesses of the creative concepts for the event, the event designs, or production and technical elements which require décor support
 - e. Consider the events timing, seasonality, location, and venue to assess opportunities and threats for decor elements and support
 - f. Conduct a risk assessment of preferred recommended, or required decor solutions
- B. Understand the technical, legal, union/labor and production opportunities and limitations for providing décor elements and services for the event
- C. Identify any intersecting opportunities with event marketing, public relations or sponsorship that will generate event decor requirements (i.e. branded decor, environmental branding, graphic elements, etc.); understand the requirements of coordinating décor elements with the conceptual themes and event collateral
- D. Understand any necessary protocol expectations, rules and requirements that generate decor requirements (i.e. stage design and layout, hierarchy for flags, banners, podiums, etc.)
- E. Ensure all event decor concepts and requirements comply with all federal, state, province, regional, city, or local laws and ordinances
- F. Consider economic, social and environmental impacts of event décor decisions
- G. Understand any permitting responsibilities and requirements for event décor along with insurance requirements for installation and use of décor at the event
- H. Generate an event decor budget
- I. Present decor concepts, solutions and plans to the hiring client or determined decision maker (i.e. event designer) for approval
- J. Initiate and execute proper legal contracts with your hiring client

Pre-Production Phase

- A. Initiate and execute proper legal documents required for event décor at the event
 - a. Initiate and execute proper legal contracts with any required sub contractors and vendors; understand rights of rental use, condition of items and return procedures
 - b. Initiate process to obtain proper insurance coverage for décor supplied to the event; get and exchange insurance documentations with your client per the terms of the contract; with sub-contractors per the term of the contract
 - c. Understand who is responsible for necessary permits required for decor elements and services; obtain any necessary permits in a timely fashion
 - d. Determine appropriate payment terms and processes; schedule of payments for any subcontracted work
- B. Engage in early communication with members of the event planning team: the client, the event designer, technical/production team, venue, food and beverage service provider, entertainment producer, and any additional event decor service providers to introduce the team and establish a clear hierarchy of decision makers and communication
- C. Visit the event venue to obtain a clear understanding of the event location:
 - a. For indoor venues: Explore the load-in and load-out path, from the arrival location of a truck, including the dock and the journey through the venue to the event location, noting doorways, corridors, lifts, freight elevators, steps and staircases, ceiling height, dock heights and depths, and any additional necessary or unique information about the event venue which will affect the delivery or installation of event decor elements
 - i. Learn the power requirements for the event venue, where power is available, and if there is an additional cost to access power; if there is an additional cost to access wireless internet as applicable for decor solutions
 - ii. Explore exits and entrances, understanding the venues approved evacuation plans in case of an emergency so that event décor does not block any necessary pathway or entrance/exit
 - iii. Explore the event flow to understand how guests may move through the event, from arrival to exit seeking opportunities or challenges for executing the event décor concepts
 - iv. Discover solutions for onsite storage of décor supplies and equipment; discover onsite or near site parking opportunities for décor trucks during the event
 - v. Discover preparation space for centerpiece arrangements or floral assembly onsite; including water access and waste and recycling management plans
 - vi. Discover, if provided, table and chair options at the venue to select appropriate linens, additional rental chairs or chair covers
 - vii. Coordinate with the venue to understand venue specific opportunities and challenges which will affect décor plans, including rigging points, airflow and ventilation etc.
 - viii. Understand venue limitations, including use of balloons, open flame policies, attaching to walls, hanging of banners or visual décor in public spaces, load-in/load out requirements/timing/dock limitations, rigging ability, etc.

- ix. Understand venue policies around labor or additional charges which the client may incur for the delivery or installation of décor elements (i.e. use of approved vendors)
- b. In the case of an outdoor venue, explore the path for load-in and load out of the event in terms of delivery, installation and strike of event décor elements, to ensure what size trucks are permitted, noting bridges, narrow paths, sidewalks, steps and staircases, weight limitations, dirt roads, etc; make additional plans for delivery in case of inclement weather
 - i. Understand back-up venue locations and limitations for change in case of inclement weather and the event's relocation
 - ii. Explore outdoor power opportunities and challenges as required for event décor elements
 - iii. Understand the venues approved evacuation plans in case of an emergency and ensure no décor elements or design plans block entrances and exits of the event
 - iv. Explore the event flow to understand how guests may move through the event, from arrival to exit seeking opportunities or challenges for executing the event décor concepts
 - v. Discover solutions for onsite storage of décor supplies and equipment; discover onsite or near site parking opportunities for décor trucks during the event
 - vi. Discover preparation space for centerpiece arrangements or floral assembly onsite; including water access and waste and recycling management plans
 - vii. Discover and address weighting and staking opportunities options for inflatable decor, outdoor signage, or other rental structures, including water/sand sources for weighting
 - viii. In the case of sub-rented restrooms and waste management solutions, understand additional décor requirements to mask or enhance these elements
 - ix. Understand venue limitations, including use of balloons, open flame policies, attaching to walls, hanging of banners or visual décor in public spaces, load-in/load out requirements/timing/dock limitations, rigging ability, etc.
 - x. Understand venue policies around labor or additional charges which the client may incur for the delivery or installation of décor elements (i.e. use of approved vendors)
- c. In the case of Tent use:
 - i. Coordinate with an event tenting professional to understand the size and type of structure utilized for the event, specifically its make and material.
 - ii. Understand if and how event flooring will be utilized and how flooring will affect provided décor elements
 - iii. Coordinate the ability to use power within the tent if needed
 - iv. Understand the rigging limitations of the tent structure and how it will impact event décor elements and plans
 - v. Understand how heating/air conditioning will impact airflow within the tent which will affect décor plans and installation

- vi. Understand the unique timing required to set-up and strike the tent as part of the event's production schedule
 - vii. Understand the use of auxiliary tents which may require décor support, including food and beverage service, restrooms, coat check, valet, registration, and any other various event elements
 - viii. Understand contingency plans in case of bad weather and how these plans will affect the utilized décor within the tent or structure
- D. Create event floor plans/site plans and schematics to document all event decor elements and services, validating compliant spacing of tables and chairs, site lines, exits and entrances, power; include load-in and load-out paths, and storage spaces; obtain any required approvals from both client and local jurisdictions (i.e. Fire Marshall)
 - E. Engage with the event designer and production company/producers to understand any required decor support for the production space; coordinate design/decor elements such as stage set, backdrops, flats, truss covers, draping, stage masking, ceiling decor, special effects, production masking, lighting, with technical installation and rehearsal schedules; additionally coordinate the dismantle schedules for the décor and technical production support elements
 - F. Coordinate with the event production company/producers to understand what event décor elements require audio, visual or lighting support; coordinate installation and control of décor based special effects such as balloon drops, rigged elements, exploding balloon walls, fountains, scent machines, etc.
 - G. Coordinate with food and beverage service suppliers to determine catering décor requirements (i.e. specialty décor, display tables, bars, flowers, etc.) for bars, buffets, and reception presentation; coordinate arrangement for required food and beverage service needs including linens, table skirting, display décor, glassware, service ware, plates, unique or custom service trays, etc;
 - H. Communicate with the food and beverage service providers any onsite requirements for staff and crew meals, or beverage service during event load-in, execution and dismantle
 - I. Coordinate with rental support supplier(s) to understand the sizes of rental elements that require event décor, including bars, dining or reception tables, registration tables, etc.
 - J. Communicate stage design plans and décor elements with the entertainment producer to ensure décor does not conflict with planned entertainment; understand additional entertainment décor requirements for backstage or green room spaces
 - K. Understand if the client requires documentation of the event décor elements by the event photographer or videographer; coordinate with these vendors to manage timing and expectations
 - L. Coordinate a pre-event schedule to meet with the client/event designer/sub contractors to share detailed décor plans and view sample elements, including linens, napkins, tablescapes, centerpieces, table signage, etc.
 - M. When custom décor elements are required, coordinate a realistic build schedule for décor elements or props, include renderings and samples as required and including time for client approval; communicate in advance post-event ownership of custom elements
 - N. Coordinate in the creation of the event production schedule with your client to ensure proper timing for event decor elements
 - a. Coordinate efforts among event vendors and any additional decor sub contractors to maximize efficiencies on site
 - b. Discover shared resource opportunities (i.e. lift rentals, rigging, lighting, etc.) to provide resource and financial saving and increase efficiencies onsite

- c. Ensure the production schedule is as inclusive as possible and appropriately liberal in allowing necessary time for set-up of the event décor elements
 - d. Ensure the production schedule is as inclusive as possible and appropriately liberal in allowing necessary time for load-out of the event décor elements
 - e. Participate in the creation of a dock schedule for all vendors providing appropriate windows of time for delivery and pick-up of event décor elements
 - f. Distribute the production schedule to all included décor service providers and sub contractors under your management for feedback and incorporate necessary changes to ensure a smooth installation, execution and dismantle of the event décor elements
- O. Based on the created production schedule and your understanding of the event, schedule appropriate labor for the installation, execution and dismantle of the event décor elements, paying attention any pertinent union and labor laws discovered in your pre-production process
 - P. Communicate across rental and food and beverage service suppliers onsite responsibility plans; understand all elements which will be on dining tables, and who is responsible for what elements of set up or strike (i.e. setting linens, lighting candles, striking linens and napkins, etc.)
 - Q. Maintain and manage the event decor budget and establish/communicate through the chain of command changes requiring budget consideration
 - R. Devise contingency plans for décor elements and services to minimize risk, including communication and response plans for changes prior to and onsite
 - S. Conduct a pre-event meeting with the event team and all decor service providers to review necessary plans, site layouts, production schedules, schematics and risk management plans

Production Phase

- A. Complete a pre-event walk-through of the venue, noting its state of condition and any damage prior to the arrival of event decor elements and services
- B. Facilitate necessary introduction among members of the event team and the client(s)
- C. Establish onsite lines of communication and decision making for on site issues, changes, enhancements or problems/emergencies
- D. Initiate the event décor portion of the production schedule for the event; manage to this schedule ensuring equal access for the installation, and execution of the event décor elements and intersecting opportunities for shared efforts and resources
- E. Execute against the dock schedule for load-in and load out of event décor elements
- F. Execute against the floor plan ensuring proper installation of all event décor elements
- G. Manage all event décor sub contractors onsite ensuring they have access to water, food and beverage, if provided, secure storage, and power for their delivery and installations
- H. Ensure all supplied décor elements are provided in good and working condition; instruct the client or a pre-determined onsite contact on the operating procedures and safety requirements for any powered or technical onsite decor items if staff is not required to hired to stay through the event to operate
- I. Communicate with the event designer and production teams to ensure the coordination of intersecting efforts and the safe installation of rigging, lighting, special effects and hanging décor

- J. Ensure any sub contracted staging, large décor and technical elements meets safety requirements; ensure all entrances/exits and pathways are compliant, clear and accessible
- K. Ensure conceptual and contractual compliance in the installation, execution and dismantle of the decor elements for the event, including local union/labor requirements
- L. Following the event, continue to manage to the production schedule of the event through the dismantle phase, ensuring a safe and proper load out of all decor elements and services
- M. Check all décor elements noting any conditional changes (i.e. wax on linens, broken rental décor, etc.) which may incur additional charges and notify the client
- N. Return the venue to its original state of condition

Post-Production Phase

- A. Return any rental décor items in their original condition per initiated contracts
- B. Analyze the success of the decor elements at the event through client, guest, and vendor feedback; hold a post-event debrief; offer constructive feedback for future events as relevant
- C. Follow-up on any issue related to event decor which arose at the event with the appropriate client(s)/vendors
- D. Ensure compliance with event decor contractual commitments, including a financial audit of the rental elements and services budget and reconciliation of all final/outstanding bills and payments

Technical Production

Technical Production: *The Technical Production Content Outline explores the steps, procedures, processes and high-level interactions required for an technical production professional to successfully perform their job function at an event. This outline looks at event technical production support services and focuses on the many Technical Production specialties and service providers include Audio, Lighting, Visual, Motion/Still Graphics, Technical Producers, Script Writers, Stage Managers, etc.*

Development Phase

- A. Develop a complete understanding of the scope of the event
 - a. Meet with your client to understand the event's purpose, vision, the messages the client wishes to communicate with their audience and the type of experience the client wishes their audience to share
 - b. Discuss and agree to measureable goals and objectives on which the event's rental services can be successfully measured
 - c. Understand the event audiences' demographics to prepare for special needs or discover gaps/opportunities in the current event plans
 - d. Meet with your client's event designer and/or creative services partners to understand the creative concepts for the event, event designs, or visual graphic elements which will create production and technical needs or requirements
 - e. Consider the events timing, seasonality, location, and venue to assess gaps and opportunities for production and technical elements or requirements
 - f. Conduct a risk assessment of preferred recommended, or required technical and production solutions
- B. Determine and understand the legal, union and labor opportunities and limitations for providing technical production support services for your client's event
- C. Identify any intersecting opportunities with event marketing, public relations or sponsorship that will generate technical production support requirements (i.e. branded rental elements, environmental branding and illumination, graphic design, etc.)
- D. Understand any necessary protocol expectations, rules and requirements that generate technical production support requirements (i.e. event security, private entrances, stage/room layouts, etc.)
- E. Understand any necessary entertainment needs and requirements that will generate technical production support requirements (i.e. staging, headline entertainment, aerial entertainment, speakers/presenters, breakout sessions, etc)
- F. Ensure all technical production support concepts and requirements comply with all federal, state, province, regional, city, or local laws and ordinances
- G. Consider the economic, social and environmental impact technical production elements and decisions will have
- H. Understand event insurance and permitting responsibilities and requirements for the technical production solutions that will be utilized
- I. Generate a technical production support services budget
- J. Present technical production support concepts, solutions, budget and plans to the hiring client or determined decision maker for approval

K. Initiate and execute proper legal contracts with your hiring client

Pre-Production Phase

- A. Initiate and execute proper legal documents required for technical production services at the event
 - a. Initiate and execute proper legal contracts with any required sub contractors and vendors; understand rights of rental use, condition of items, delivery and labor policies and return procedures
 - b. Initiate process to obtain proper insurance coverage for the event in terms of technical production services; obtain and exchange insurance documentations with your client per the terms of the contract; with sub-contractors per the term of the contract
 - c. Understand who is responsible for required permits for technical production support elements and services; obtain any necessary permits in a timely fashion
 - d. Determine appropriate payment terms and processes; schedule of payments for any subcontracted work
- B. Engage in early communication with members of the event planning team: the client, the event designer, event rental partners, venue, food and beverage service provider, entertainment producer, and any additional technical production support service providers to introduce the team and establish a clear hierarchy of decision makers and communication
- C. Visit the event venue to obtain a clear understanding of the event location:
 - a. For indoor venues: Explore the load-in and load-out path, from the arrival location of a truck, including the dock and the journey through the venue to the event location, noting doorways, corridors, lifts, freight elevators, steps and staircases, ceiling height, dock heights and depths, and any additional necessary or unique information about the event venue which will affect the use of technical production equipment or elements
 - i. Learn the power requirements for the event venue, where power is available, and if there is an additional cost to access power; if there is an additional cost to access wireless internet as applicable to technical production support solutions
 - ii. Explore exits and entrances, understanding the venues approved evacuation plans in case of an emergency
 - iii. Explore the event flow to understand how guests may move through the event, from arrival to exit noting opportunities or challenges for technical production support services and solutions
 - iv. Discover solutions for onsite storage of technical support equipment; discover onsite or near site parking and storage opportunities for technical production service trucks and equipment during the event
 - v. Discover waste and recycling management plans and procedures
 - vi. Understand venue limitations that may impact technical production solutions, including attaching to walls, rigging limitations, hanging of banners, production equipment or visual décor element in public spaces, load-in/load out requirements/timing/dock limitations, rigging ability, etc.
 - vii. Understand venue policies around labor or additional charges which the client may incur for the use of technical production elements (i.e. use of

- approved or in house technical production partners, union labor requirements)
- b. In the case of an outdoor venue, explore the path for load-in and load out of the event in terms of rental support, ensure what size trucks are permitted, noting bridges, narrow paths, sidewalks, steps and staircases, weight limitations, dirt roads, etc; make additional plans for delivery in case of inclement weather
 - i. Understand back-up venue locations and limitations for change in case of inclement weather and the event's relocation
 - ii. Discover the needs for barricades to create the event space or back of house/front of house locations; learn about any special permitting relevant to technical production support required for an outdoor event
 - iii. Discover and address weighting and staking options for sub-rental structures (i.e. staging, lighting and audio towers, overhead tenting to protect stages or production equipment, etc.)
 - iv. Based on discovered load-in and load-out paths, determine best methods (carrying or wheeling) as well as the number of staff and time needed to move technical production elements into the event site or storage locations
 - v. Explore outdoor power opportunities and challenges as required for the event, including availability of space for generators
 - vi. Understand the venues approved evacuation plans in case of an emergency
 - vii. Explore the event flow to understand how guests may move through the event, from arrival to exit seeking opportunities or challenges for technical production support services
 - viii. Discover solutions for onsite storage of rental support equipment; discover onsite or near site parking and storage opportunities for rental service trucks and equipment during the event
 - ix. Discover waste and recycling management plans and procedures
 - x. Discover water access as required for food and beverage service for catering crew meals or greenrooms for entertainment and the possibility of filling water barrels for tent structures if staking is not permitted
 - xi. Understand the outdoor venue's limitations, including attaching to walls or structures which exist, rigging limits, hanging of banners, production equipment or visual décor in public spaces, load-in/load out requirements/timing/dock limitations, rigging ability, etc.
 - xii. Understand venue policies around labor or additional charges which the client may incur for the use of technical production elements (i.e. use of approved or in house technical production partners, union labor requirements)
 - c. In the case of Tent use:
 - i. Understand the legal requirements and permitting requirements within the relevant jurisdictions for the use of technical production equipment within a tent at the event venue
 - ii. Communicate with the event venue and tent rental support services vendors to understand the complexities or intricacies of the installed tent including geographic challenges, weight limitations for rigging or ground support, the need for auxiliary production tents, auxiliary production

- power and catering, and the back-up plan in case of inclement weather for the event location
 - iii. Communicate the timing required to set-up and strike technical production elements within and around the tent as part of the event's production schedule
- D. Engage and communicate with creative services partners who are creating content for the event; ensure compliance with playback of created content for necessary technical equipment being provided, schedule appropriate time for exchange on content, participate in the scripting process and create a back-up plan for script or visual content changes on site
- E. Engage the entertainment producer to understand any required technical production support for event speakers or entertainment, including staging, lighting, audio and visual graphic requirements as well as backstage and green room needs; in the case of a professional speaker or entertainer, obtain and understand the technical production components of the artists rider
- F. Engage with any partners providing social media support for the event, understanding their technical production requirements for internet, power, computer platforms or mobile app technology and integration of social content into displayed visual graphics at the event; in the case of a virtual event, capture the requirements for recording and broadcasting over the internet or satellite services
- G. Engage with the event's rental support partners to understand any required rental support for the technical production portions of the event; coordinate rental support elements, such as staging, draping, furniture, production masking, lighting, etc., with technical installation and rehearsal schedules; coordinate the dismantle schedules for these technical production support elements
- H. Communicate with the food and beverage service providers any onsite requirements for staff and crew meals, or beverage service during event load-in, execution and dismantle
- I. Devise contingency plans for technical production support elements and services to minimize risk, including communication and response plans
- J. Create event floor plans/site plans and schematics to document all technical production elements and services, validating compliant spacing for stages, front of house and back of house production zones, exits and entrances, power; include load-in and load-out paths, and storage spaces; obtain any required approvals from both client and local jurisdictions (i.e. Fire Marshall)
- K. Create a technical script for the event, including the script for any presentation of performance, lighting cues, audio cues, visual motion graphic cues, special effect cues and any other unique technical notes for the production/presentation/performance at the event
- L. Coordinate in the creation of the event production schedule with your client to ensure proper timing for event rental elements
 - a. Coordinate efforts among technical production partners and any additional rental support sub contractors to maximize efficiencies on site
 - b. Discover shared resource opportunities (lift rentals, rigging, lighting, etc.) to provide resource and financial saving and increase efficiencies onsite
 - c. Educate your client on typical gaps or pitfalls in the creation of the production schedule as relevant to the technical production support elements and services for the event (i.e. if you install the stage prior to the lighting, you won't be able to get a lift in to rig the lights, etc.)

- d. Ensure the production schedule is as inclusive as possible and appropriately liberal in allowing necessary time for set-up of the event, including necessary rehearsals, sound checks and lighting/visual motion graphics cuing.
 - e. Ensure the production schedule is as inclusive as possible and appropriately liberal in allowing necessary time for load-out of the event
 - f. Create a dock schedule for all vendors providing appropriate windows of time for delivery and pick-up of technical production service elements
 - g. Ensure the production schedule includes an accurate show or event flow with time cues
 - h. Distribute the production schedule to all included technical production service providers and sub contractors under your management for feedback and incorporate necessary changes to ensure a smooth installation, execution and dismantle of the event, in terms of rental support requirements
- M. Based on the created production schedule and your understanding of the event, schedule appropriate labor for the installation, execution and dismantle of the event in terms of technical production support requirements, paying attention to specialized roles (i.e. stage manager, prompter, show caller, etc.) as well as any pertinent union and labor laws discovered in your pre-production process
- N. Maintain and manage the technical production support services budget and establish/communicate through the chain of command changes requiring budget consideration
- O. Conduct a pre-event meeting with the event team and all technical production support service providers to review necessary plans, production schedules, schematics and risk management

Production Phase

- A. Complete a pre-event walk-through of the venue, noting its state of condition and any damage prior to the arrival of technical production support elements and services
- B. Facilitate necessary introduction among members of the event team and the client(s)
- C. Establish onsite lines of communication and decision making for on site issues, changes, enhancements or problems/emergencies
- D. Initiate the technical production support services portion of the production schedule for the event; manage to this schedule ensuring equal access for the installation, and execution of the event and intersecting opportunities for shared efforts and resources
- E. Ensure conceptual and contractual compliance in the installation, execution and dismantle of the technical production support elements and services for the event, including local union/labor requirements
 - a. Execute a dock schedule for load-in and load out of technical production support elements
 - b. Execute the floor plan ensuring proper installation of all technical production elements
 - c. Manage sub contractors to understand onsite where they have access to water, food and beverage, secure storage, and power for their elements
 - d. Ensure all supplied technical production support elements are provided in good and working condition; instruct the client or a pre-determined onsite contact on the operating procedures and safety requirements for any powered or technical onsite rental items if staff is not required to hired to stay through the event to operate

- e. Communicate with the event designer and production teams to ensure the coordination of intersecting efforts and the safe installation of rigging, lighting, special effects and hanging décor
- f. Engage with the entertainment producer to ensure compliance in executing sound checks, presentation testing, loading of prompters, speaker rehearsals, visual motion graphics testing script or presentation updates, and lighting cues; ensure all creative graphic or special technical elements are working appropriately and all elements are appropriately staffed with required union positions or others (i.e. stage manager, talent wrangler, etc.)
- g. Ensure any sub contracted staging, production décor and technical elements meets safety requirements; ensure all entrances/exits and pathways are compliant, clear and accessible
- F. Initiate the show flow; ensure successful execution of the event script including the calling of all cues as written or modified during the rehearsal process
- G. Following the event, continue to manage the production schedule of the event through the dismantle phase, ensuring a safe and proper load out of all technical production elements and services
- H. Check all technical production elements noting any conditional changes (i.e. broken or missing equipment, damaged podium, etc.) which may incur additional charges and notify the client
- I. Return the venue to its original state of condition

Post-Production Phase

- A. Return any technical production support elements in their original or required return condition per initiated contracts
- B. Analyze the success of the technical production support elements and services at the event through client, guest, and vendor feedback; hold a post-event debrief
- C. Follow-up on any issue related to event rentals which arose at the event with the appropriate client(s)/vendor
- D. Ensure compliance with event rental related contractual commitments, including a financial audit of the rental elements and services budget and reconciliation of all final/outstanding bills and payments
- E. Archive necessary content from or generated during the event

Speaker Management

Speaker Management: *This Content Outline explores the steps, procedures, processes and high-level interactions required for an event professional to make successful recommendation and management of a speaker for an event, meeting or conference.*

Development Phase

- A. Develop a complete understanding of the scope of the event
 - a. Meet with your hiring client to understand the events purpose, vision, the messages your client wishes to communicate to their audience and the type of experience the client wishes the audience to share
 - b. Discuss and agree to measureable goals and objectives on which the success of the event's speaker(s) can be measured
 - c. Understand the event's flow from start to finish and how a speaker or series of speakers fit into the overall event experience including needs for general sessions and breakout meetings
 - d. Understand the event audiences' demographics to prepare for unique audience content needs and/or discover gaps/opportunities in the current event plans where speakers can enhance the delivery of content
 - e. Meet with your client's creative/production partners to understand strengths and weaknesses of the creative concepts for the event, the event's stage/space designs, or production and technical elements that will affect or generate speaker needs
 - f. Determine if there is/are virtual, recording or broadcast requirements for the event
 - g. Understand the technical, legal, union/labor, and production limitations for providing speaker-based content at the event
 - h. Identify intersecting opportunities or challenges for content delivered through speakers with event marketing, public relations, and sponsorship for/of the event;
 - i. Identify matters of protocol and how they relate to the use of a speaker for the event
- B. Develop an overall speaker strategy for the event
 - a. Determine if, when and how many speakers are required or appropriate for the event as a vehicle for conveying a message, providing training, or motivating the audience, based on the client's goals.
 - b. Assess speakers who would best fit the goals and objectives of the event; consider the audience demographics and messages to be conveyed
 - c. Consider the event elements (i.e. location, time, audience, type, etc.) to determine the right speaker options
 - d. Generate a list of relevant speakers for the event; vet these speakers against the clients goals and objectives; solicit written or visual examples of their presentation including key learning objectives
 - e. Conduct a risk assessment of preferred, recommended, or requested speakers
 - f. Consider the economic, social and environmental impacts of each preferred, recommended, or requested speakers participation in the event

- g. Ensure that your use of a speaker for the event complies with all federal, state, province, regional, city or local laws and ordinances; consider any permitting responsibilities and requirements as well as insurance requirements to bring in recommended speakers for the event
- h. Create measurement strategies/outcomes for measuring the success of the speaker(s) at the event
- C. Create or acquire from your client a speaker budget; being certain to include all necessary fees, travel, accommodations, per diem, technical requirements, and management expenses.
- D. Review speaker recommendations, selecting the speaker(s) best suited to the event; present these plans to the hiring client for approval
- E. Initiate and execute proper legal contracts with your hiring client

Pre-Production Phase

- A. Engage in early communication between your hiring client and other members of the event/planning team, especially the creative content creators and the technical/production partners and, when relevant, necessary entertainment contractors/booking agent or talent management partners to introduce the team and establish clear hierarchy of decision making and communication
- B. In communication with your speaker(s) or in the case of a professional speaker, obtain and read the speaker(s) rider; share the rider/speaker requirements with relevant sub contractors and service providers under your management for the event:
 - a. Determine the type/format of presentation, such as delivered from a stage, with or without graphic content support, a panel or talk show format
 - b. Understand the speaker's preferred set-up for the audience, such as crescent rounds, theater style, casual/interactive seating, etc. Ensure the space for the event is adequate to effectively meet the preferred style and account for the appropriate/expected count of attendees
 - c. Determine the need of desirability of Q&A following the presentation and manage the necessary logistical details of having microphones and runners available to feed audience questions or technology solutions for capturing or monitoring questions submitted through virtual platforms or apps (ie Twitter)
 - d. Understand any specific food and beverage requirements and requests; communicate early with food and beverage service provider(s) to ensure all requirements and requests can be met, including dietary restrictions and/or allergies
 - e. Understand requirements for audio and visual components of speakers presentation including but not limited to size of stage, stage set, visual graphic requirements, lighting requirements, audio requirements, speaker support – including use of a podium, prompter, presentation monitor, countdown clock, slide advance tool, etc.
 - f. Determine the need for and logistical plan to create, deliver, and distribute any necessary speaker materials, such as flyers or handouts.
 - g. Understand the speaker(s) requirements and requests around meet and greet opportunities, autograph signing, security needs, parking and transportation, hotel rooms, green room/dressing room set-up and location, and merchandise sales; negotiate special requests (i.e. meet and greet, photo opportunities,

- recording or videotaping of the performance, sales of merchandise, etc.) into the contractual agreements between the client and speaker(s)
- h. Understand and communicate any custom content speaker requirements; establish these requests early through open communication with the speaker(s), agents, assistants, booking agency or speakers bureau to ensure feasibility
 - i. If questions or special requests arise, communicate early between client/producers and the speaker(s), their agent, assistant to communicate necessary changes/amendments/requests and approve such changes in writing
- C. Initiate and execute proper legal documents required for each speaker at the event
- a. Agree to terms regarding promotional activities including a set schedule for receiving the speaker(s) image and bio for promotional and communication uses
 - b. Establish a milestone timeline for preproduction speaker needs for the following milestones:
 - i. Receipt of images and speaker bios for use in appropriate marketing and communication processes
 - ii. Receipt of presentation in a timely fashion to permit review, feedback and changes
 - iii. Receipt of visual or graphic content for review, feedback and changes, as well as testing
 - iv. Booking of travel and accommodations, ensuring proper arrival and transportation times to account for rehearsals and presentation and onsite activities
 - c. Determine, negotiate and agree to rights of use, rights for recordings of the presentation, right to document for still or motion images, rights to broadcast, to record and broadcast at a later time
 - d. Determine logistical details such as shipment of materials to the site in advance, greeting of the speaker upon arrival, any auxiliary events the speaker is invited too, or VIPs the speaker should know at the event
 - e. Determine how the speaker should be introduced and by whom at the event
 - f. Determine appropriate payment terms and processes; schedule of payments for any subcontracted work
- D. Generate a detailed speaker itinerary and distribute to the speaker and relevant support staff clearly communicating all necessary and final details regarding the presentation that have been detailed during the pre-production phase.
- E. Establish lines of communication for a clear distribution of information (i.e. required stage footprint including onstage, offstage, access points for your speaker; visual graphics playback and control of presentation; loading of the prompter/podium book, etc.) among event production partners to ensure proper attention is paid to event timing, food and beverage requirements and decorative materials, such as flags, banners, floral arrangements, backdrops, draping, podiums, lighting instruments, etc. placed on/around the stage or within the speaker's presentation area
- F. Engage with necessary sub contractors or additional resources to provide for the technical production elements required, including creative visual graphics, lighting specifications, audio needs, stage design requirements, special effects, etc.
- G. Coordinate in the creation of the event production schedule with your client to ensure proper timing for entertainment elements

- a. Coordinate efforts among event vendors and any additional sub contractors engaged in the delivery of the speaker content/presentation to maximize efficiencies on site
 - b. Ensure the production schedule is as inclusive as possible and appropriately liberal in allowing necessary time for set-up, testing of content, and rehearsal of the speaker(s)
 - c. Ensure the production schedule is as inclusive as possible and appropriately liberal in allowing necessary time for load-out of any requirements brought in on behalf of the speaker(s)
 - d. Distribute the production schedule to all included service providers and sub contractors under your management for feedback and incorporate necessary changes to ensure a smooth installation, execution and dismantle of the content presentations
- H. Based on the created production schedule, schedule appropriate onsite support for the set-up, testing of content, rehearsal, presentation and departure of the speaker(s) from the event
 - I. Pay attention to any pertinent union and labor laws discovered in your pre-production process which will impact the arrival, set-up, rehearsal and presentation by your speaker(s) and account for these implications and their effect on your event's timing and budget
 - J. Maintain and manage the speaker budget and establish/communicate through the chain of command changes requiring budget consideration
 - K. When required for a headline speaker or dignitary, devise a security plan including onsite security personnel, transfer security personnel, stage barriers and identification devices. Coordinate the communication of this plan with your hiring client, necessary vendors, onsite security providers and entertainment
 - L. Devise contingency plans for speaker(s) presentations to minimize risk, including communication and response plans for changes to the presentation prior to and onsite, or a speaker who is unable to deliver or complete their presentation, as well as logistical challenges (i.e.: microphone or presentation graphics do not work)
 - M. Conduct a pre-event meeting with the event team and all speaker service providers to review necessary plans, site layouts, production schedules, schematics and risk management plans

Production Phase

- A. Initiate speaker relevant portions of the production schedule for the event; manage to this schedule ensuring efficiency and success in each step
- B. Facilitate necessary introduction among members of the speaker management team and the client and technical partners with the speaker(s); distribute clearance/security passes when required
- C. Establish onsite lines of communication and decision making for on site issues, changes, enhancements or problems/emergencies
- D. Establish and maintain required speaker presentation and backstage spaces, including stage(s), front and back of house locations, green rooms and transition/pathways, entrances and exits
- E. Establish and maintain any required or desired merchandise area for the sale of speaker-related content or items; ensuring proper steps

- F. Ensure compliance for all contracted/rider requirements; ensure all supplied technical, audio visual and staging meets safety requirements; ensure all entrances/exits and pathways are clear and accessible, ensure all supplied items are provided in good and working condition
- G. Manage rehearsals with the speaker(s) including audio, visual/graphics tests, computer connections and slide advancement practice and any other necessary rehearsal requirements for speaker(s) presentations
- H. Following the event, continue to manage to the production schedule of the event through the dismantle phase, ensuring a safe and proper load out of all speaker(s) requirements and services
- I. Return the venue to its original state of condition, paying specific attention to green room and backstage spaces utilized by the speaker(s). Collect and dispose of appropriately any leftover content distributed through handouts for the session

Post-Production Phase

- A. Analyze the speaker(s) utilized for the event through client, guest, speaker and vendor feedback; hold a post-event debrief to determine success and suitability
- B. Follow-up on any issue related to the speaker(s) which arose at the event with the appropriate client(s)/vendors
- C. Ensure compliance with speaker-related contractual commitments, including a financial audit of the speaker budget and reconciliation of all final/outstanding bills and payments
- D. Archive all relevant collateral, event details and materials

Venues

Special Event Venues: *This Content Outline explores the steps, procedures, processes and high-level interactions required for an event professional who works for a venue or special event location to work with fellow event professionals to successfully create an event for their client.*

Development Phase

- A. Develop a complete understanding of the scope of the event
 - a. Meet with your client to understand the event's purpose, vision, the messages the client wishes to communicate to their audience and the type of experience the client wishes for their audience to share
 - b. Discuss and agree to measurable goals and objectives which would make the selection of the venue successful for the client
 - c. Understand the event audiences' demographics to prepare for special needs and requirement from the event venue and to discover gaps/opportunities in the current event plans
 - d. Meet with your client's creative services partners, event designer and/or production companies to understand the creative concepts and vision for the event, event design elements, or production and technical elements as/if already determined or in process
 - e. Consider the events timing, seasonality, location, and venue to assess gaps and opportunities and rental needs or requirements necessary to execute the event at the given venue
 - f. Understand any necessary protocol expectations, rules and requirements that affect hosting the venue on property (i.e. location for outdoor wedding in a culturally appropriate setting, need for a secure floor to house a dignitary and their team, etc.)
- B. Determine the requirement for space for the event including general and auxiliary session, offsite events, on property special events or buyouts of onsite restaurants or specialty locations, sleeping rooms, storage and registration space, or any other element as defined by the client
- C. Identify any intersecting opportunities with event marketing, public relations or sponsorship that will generate promotional opportunities for the venue
- D. Conduct a risk assessment of hosting the event at a given venue
- E. Ensure desired event plans comply with all federal, state, province, regional, city, or local laws and ordinances if the event is hosted at a given location (i.e. ability to serve alcohol at a specific sites, etc.)
- F. Consider the economic, social and environmental implications of hosting the event at a given property
- G. Understand and be able to communicate permitting responsibilities and requirements for the event plans at a given event location or site
- H. Determine staffing needs required to meet client expectations for the event to be successful executed at a given venue
- I. Generate an event proposal for the hiring client to consider

- a. Outline the available space on/off the property on the desired dates for hosting the event
- b. Provide accurate floor plans, capacity charts, set-up diagrams, room names, images and accurate pricing for the meeting/event spaces required, including exhibit, breakout session, storage, office, and registration/foyer space
- c. Outline food and beverage service options and accurate pricing
- d. Outline sleeping room availability and room rate, if required
- e. Outline and articulate regulations which will impact the client's decision, included but not limited to preferred rental partners, technical production requirements, labor/union regulations, power and internet availability, available upgrades and amenities, in-house or included rental elements (i.e. tables and chairs available on the property)
- f. For special events requiring a buyout of a property feature, clearly communicate the availability of venue on a desired date, accurate floor plans and list of included elements and accurate pricing
- g. For outdoor events, communicate benefits and limitations include back-up locations in case of inclement weather, the ability to tent the space, ability to serve food and beverage or provide entertainment in the space, etc.
- h. Outline a deadline for decision making
- J. Schedule with the client a site visit if able/applicable to see the space(s) included within the proposal

Pre-Production Phase

- A. Upon selection, initiate and execute proper legal documents required for the use of a facility or venue with your hiring client
 - a. Ensure the contract captures all the required details, dates and specific information required for the client's event
 - b. Initiate and execute proper legal contracts with any required sub contractors and vendors who will provide services for the client through the venue; in the case of sub rentals (china, dishes, kitchen equipment, bars, etc.) understand rights of rental use, condition of items and return procedures
 - c. Initiate process to obtain proper insurance coverage for the event at the venue; get and exchange insurance documentations with your client per the terms of the contract; with sub-contractors per the term of the contract
 - d. Determine appropriate payment terms and processes; schedule of payments for any subcontracted work
- B. Negotiate the contract with the hiring client, specifically detailing elements included but not limited to: amenities and upgrades, internet service, room rates, attrition, facility/venue rental, technical production services and food and beverage minimums
- C. Engage in early communication with members of the event planning team, the client, the event designer, technical/production team, food and beverage providers (if not provided by the venue), rental support suppliers, entertainment producer, to introduce the team and establish a clear hierarchy of decision makers and communication
- D. Create a process with the client to collect and manage necessary details: registration, room booking, food allergies and special food and beverage requests, upgrades and amenities, production, rental, and décor elements and plans for the event

- E. Work with the event partners to ensure designs and plans comply with venue regulations and any local rules, regulations and ordinances within a jurisdiction and ensure any/all necessary permitting and insurance is obtained prior to the event
- F. In the case of an exposition, work with the client to communicate shipping and drayage procedures or required vendors to manage these processes to communicate to exhibiting vendors
- G. If food and beverage is provided by the venue, schedule a tasting with the client to settle on menu for the event
- H. Assist the event team and client to partake in site visits to confirm measurements, complete room drawings, discover power needs, track delivery paths and exits
- I. As needed assist the event team with the creation of accurate floor plans for the event
- J. Assist the event team with the creation of an accurate production schedule for the event
 - a. Coordinate efforts among all event partners and any internally managed rental support sub contractors to maximize efficiencies on site
 - b. Discover shared resource opportunities (lift rentals, rigging, lighting, etc.) to provide resource and financial saving and increase efficiencies onsite
 - c. Educate your client on typical gaps or pitfalls in the creation of the production schedule as relevant to the venue/facility
 - d. Ensure the production schedule is as inclusive as possible and appropriately liberal in allowing necessary time for set-up of the event
 - e. Ensure the production schedule is as inclusive as possible and appropriately liberal in allowing necessary time for load-out of the event
 - f. Create a dock schedule for all vendors providing appropriate windows of time for delivery and pick-up of technical production service elements
- K. Based on the created production schedule and your understanding of the event, schedule appropriate labor for the installation, execution and dismantle of the event in the venue (i.e. service staff, cleaning staff, food and beverage staff, etc.)
- L. Create a BEO to capture all of the necessary venue details and communicate these details effectively through the chain of command within the facility/venue per the internal procedures; the BEO would capture, but not be limited to, signage requirements, room set-ups and flips, food and beverage details, security requirements, and special details unique to the client's event
- M. Devise contingency plans to minimize risk, including communication and response plans
- N. Host a pre-con meeting with the event team and hiring client to review necessary plans, the BEO, production schedules, schematics and risk management

Production Phase

- A. Complete a pre-event walk-through of the venue with the client and required event partners, noting its state of condition and any damage prior to the arrival of the event team
- B. Facilitate necessary introduction among members of the event team, facility staff and the client(s)
- C. Establish onsite lines of communication and decision making for on site issues, changes, enhancements or problems/emergencies
- D. Ensure conceptual and contractual compliance in the installation, execution and dismantle of the venue supplied services and elements for the event

- a. Ensure any venue sub contracted staging, production décor and technical elements meets safety requirements; ensure all entrances/exits and pathways are compliant, clear and accessible
- E. Initiate the show flow; ensure successful execution of the event
- F. Following the event, continue to manage the production schedule of the event through the dismantle phase, ensuring a safe and proper load out of all elements and services
- G. Ensure the return of the venue to its original state of condition

Post-Production Phase

- A. Analyze the success of the services at the event through client, guest, and vendor feedback; hold a post-event debrief
- B. Follow-up on any issue related to venue/facility which arose at the event with the appropriate client(s)/vendor(s)
- C. Ensure compliance with contractual commitments, including a financial audit of the rental elements and services budget and reconciliation of all final/outstanding bills and payments
- D. Archive necessary information from the event