

Give the Golden Ticket: Managing Risk for Special Events

Hopefully, the patrons of your organization's special events feel as lucky as Charlie Bucket in Roald Dahl's beloved *Charlie and the Chocolate Factory*. By bestowing a golden ticket and a memorable event experience upon a participant, you might retain that individual as a donor or advocate for years to come. But if special events fall short of attendee expectations, your patrons will leave feeling like "bad eggs" as they emerge from your figurative chocolate factory.

Effective event planning requires employing a risk management mindset. Learn how to leverage a risk-aware lens while following these five key event planning steps. You'll be sure to produce a memorable, meaningful event that can survive multiple mishaps.

Set Goals and Strategy

When planning special events, perhaps the greatest risk to your organization is the strategy you set and the decisions your team makes about committing to an event itself. Teams might enthusiastically dive into the event planning process with a compelling idea and a fundraising goal in mind, but how many teams spend significant time considering strategy, including asking the question: Is an event really the best way to achieve our goals?

Great decisions are made by challenging the assumptions that underlie or inspire them. Before committing to the idea of hosting a special event, reflect on questions like these:

- What are our team's goals?
- Is hosting/producing an event a realistic and feasible way to achieve one or more of those goals? If yes, do we know so or think so? And why?
- Is there a better way to achieve our goals (rather than hosting an event)?
- Is the potential return from an event worth the stress, resource strain, and effort required to produce the event?
- How confident are we that an event will achieve our desired results?
- What if the event fails to achieve results? What does failure look like? Is the potential return high enough that the event is still worth trying despite the chance of failure? How intense of failure are we willing to risk?

If an event is in fact determined to be the best path forward, then reflect on the suitability of broad event ideas in relation to your organization's mission, available resources, stakeholder network, and reputation. Ask questions like:

- What types of events are appropriate and compelling given our mission and the expectations of our stakeholders?

- Should we focus on producing a single event or plan for the possibility of expanding the event, for example, as a recurring event? Or should we conceptualize the event as a single component of a broader campaign, project, or initiative we are working on?
- What financial (or other) gain must we secure from an event in order to consider it successful? Is a successful outcome likely or even possible?
- What is our appetite for achieving success? How much money, time, effort, etc. are we willing to invest in order to achieve a successful outcome? Is there anything we are unwilling to do in order to succeed?
- If our event fails to achieve its stated goals, or if something goes terribly wrong, what type of consequences—both negative and positive—might we face? How might our organization’s reputation be affected in the short- and long-term?
- Might there be any surprising consequences if the event surpasses all of our goals and is considered a huge success?

Design the Event Program

After setting a general direction for the event, begin planning the event program and content while considering potential risk issues like:

- Relevance and reliability of event program and content to truly catalyze the behaviors you hope to influence in attendees (e.g., donating, advocating, participating, learning, etc.)
- Appropriateness of event content in relation to the values, cultures, and demographics of your target audience (e.g., planning a corporate conference that conflicts with a religious holiday; planning a private primary school’s fundraising gala without offering childcare options, etc.)
- Due diligence before establishing relationships with guest speakers, performers, sponsors, vendors, and other partners whose values and reputations should align with those of your organization
- Special safety considerations for any vulnerable populations in attendance (e.g., youth, developmentally disabled individuals, survivors of trauma, etc.)
- Possibility of **servicing alcohol** as part of the event program

While planning your event’s content, strive to plan one or more alternatives for each component of the program. If for any reason the event program cannot be executed as designed, your team will have a backup plan in place.

Plan for Logistics

Consider risk when planning for each logistical component or function of your event, from attendee safety to marketing to registration to vendor relationships, and more. With your team’s help, reflect on whether you have contingency plans in place—both for your event planning processes and for the components of the event itself. Whenever possible, test technology, inspect venues, rehearse programming, fortify vendor and sponsor relationships, and triple-check that all your expectations are being met in advance of the event. Also proactively manage [common event planning mistakes](#) identified by event professionals, your peer organizations, and your own team.

Prepare a [crisis management and cancellation plan](#) in case a major emergency threatens to derail your event before the day-of-show. Also collaborate with your venue, partners, and local first responders to prepare an emergency response and evacuation plans should serious dangers arise during the event. Many resources exist online to help event planners prepare to handle on-site emergencies, such as:

- [Emergency Planning Factsheets](#) (Great American Insurance Group)
- [Security Action Plan for Events](#) (Great American Insurance Group)
- [Emergency Response Planning Resources](#) (Ready.gov)
- [Emergency Response Plan Template](#) (MeetGreen events management company)
- [Information on Planning for Incidents and Emergencies](#) (UK Health and Safety Executive)

Aside from planning for emergencies and general contingencies, be sure to manage risks related to contracts with your venues and vendors. Explore contracting resources like:

- [An Essential Contract Checklist for Meeting Planners](#) (MeetingsToday)
- [10 Essential Points to Include in Your Venue Contract](#) (BizBash)
- [Event Contracts for Nonprofits: When to Push Back](#) (Perlman & Perlman LLP)
- [Would You Sign A Contract You Haven't Read?](#) (Nonprofit Risk Management Center)

Also collaborate with your insurance agent or broker to determine whether your team should secure special events insurance to help cover costs arising from property damage, bodily injury, or alcohol-related incidents that might occur during your event.

Discharge Your Day-of-Show Duties

Hopefully, all goes well leading up to your event, allowing you to execute the event as planned. But, since surprises are a fact of life, ready your team to remain calm when things go wrong. Prepare yourselves to devise and implement solutions on the fly, and—if needed—to enact the various contingency plans and emergency response plans you created.

If any major catastrophes occur during your event, consider whether it might be appropriate to address the issues transparently and at the moment with your attendees and other stakeholders. The immediacy of information sharing through social media and the 24-hour news cycle might make it impossible for you to keep an emergency under wraps anyway, so getting ahead of a PR nightmare could be wise.

Conduct an After-Event Review

EventMB (Event Manager Blog) explains in its article about [45 questions to ask during event debriefs](#) that, “An event planner’s work is never done—not even when the event itself is over.” After any event, gather your team and conduct a review, perhaps reflecting on the 45 questions to assess attendee satisfaction and your team’s performance in planning the event. The EventMB article also provides helpful suggestions for facilitating a debrief session and for planning ahead to solicit event feedback from various stakeholder groups both during and after the event.

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