

Beyond the Checklist:

*Lessons in Planning
with an Eye on Risk
Management*

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For many campus programmers,

event planning eventually comes down to the ever-dependable checklist. It is the list of to-do's we use repeatedly to cover all the bases for our activities. It is the list that, when completed, we feel assures us a reasonable chance for a successful event. But does it?

To programmers, a planning checklist is a valuable tool for both organizing events and teaching students the steps and stages of program development. However, before any programming board or concert committee picks its performers or brings out its checklist, many things must be accomplished.

Not long ago, Binghamton University (NY) found itself with a rapidly growing student body, expanding facilities and a growing number of student programming organizations. While it was only logical that programming would expand as the University grew, it was still a shock to systems and processes when the number and nature of events began to rapidly change. Suddenly, what were once large events attracting a few hundred people became a common occurrence. Large events redefined themselves to be those attracting 1,500-3,000 people and new venues brought super sized audiences of 5,000-7,500-plus.

It was time for a new checklist. The University had to step back, face some realities, and engage the entire community in the process of reviewing risk and event management procedures. As a result, the University Events Management Committee was formed to facilitate communication between departments and enable a campus-wide overview of university programming. In addition, as new systems and processes evolved, everyone learned many programming lessons. What follows are a few of the lessons that got campus programmers thinking beyond a checklist. These are the considerations and action plans that served to prop up a new checklist, make it work and helped organize our planning. After all, we all know that the three most important elements of managing our risk and our events are planning, planning and planning.

Assess Your Venues and Plan Before You Program

While every campus is different, we all share the common reality that programming occurs in a number of locations (college unions, dining halls, gymnasiums, arenas, outdoor areas, theaters, etc). We also share a second reality that only a few of these venues were actually designed for programming. These, in turn, lead us to a third reality that, unless you're one of the lucky institutions to have new facilities, most programming spaces we use weren't built to handle the size or types of programs being offered on today's campuses.

Given the amazing ideas and opportunities available to 21st Century programming boards, an initial step in program planning must be venue assessment. This examination should consider each venue's appropriateness to varying types of events. Each venue should be evaluated relative to:

- Fire and safety codes
- Crowd flow and control issues
- Artist support and security
- Traffic and parking
- Available technology
- Emergency response capabilities

While this is not a process that is fun for everyone, it is an opportunity to engage those with this kind of expertise in the program planning process. Taking on this task is crucial to minimizing risk and being prepared for the "what if's" of event planning. Also, having a general management plan for each venue that can be tweaked to accommodate specific events can save a great deal of planning time.

Lesson Learned?

Some events just can't happen in some venues.

If an ambulance gurney can't fit through a door, it's not the right place to hold an event that includes physical activity or high-risk audience behaviors. If there isn't enough power in the facility to handle sound and lights, you need an external generator or another venue. Knowing your venues is crucial to managing your risk and your event.

Have a Plan for Planning

Effective program planning doesn't happen by accident. It needs to be an intentional process. The more your planning is dependent on a series of phone calls and doorway decisions, the greater the chance your plan will break down and your event will end up being something far less than you had hoped.

A few things to remember in designing your planning process:

- First, the more people, or departments you establish as stakeholders in the success of the event, the less likely you are to run into problems. Bringing all college departments involved with an event to the planning table with students and activities staff builds teamwork that will pay off later.
- Second, the planning process needs to be efficient to be effective. No one has time to waste. Planning meetings need to be focused with clear agendas. When planning very large activities, consider a series of smaller meetings focusing on different program elements leading up to a larger gathering of stakeholders.
- Third, communication channels need to be discussed and reviewed. How and which decisions are going to be made must be universally understood.
- Finally, no one should be left to assume anything about a major program. There should be a widely circulated written plan or guide for every event.

Lesson Learned?

An inclusive consistent planning process helps ensure operationally better and safer programs.

By engaging all departments in the planning process, everyone becomes stakeholders in the event. In addition, planning meetings become learning opportunities for students and staff alike as they interact with people with differing expertise and skills.

Pre-Planning Questions Can Prevent Planning Nightmares

A large part of developing a planning process is finding out what it is you need to know. That might sound confusing, but knowing in advance what information you need for the planning process can save a great deal of time and avoid many problems. Ask your venue manager(s), maintenance department, security/safety personnel and anyone else who may be involved in programming what information they need to facilitate planning and assure a successful event.

There are two steps you can take to accelerate this process:

- First, request a copy of the technical and security riders associated with a potential contract before you bid. Share these documents with supporting departments. Even before planning begins, this will give everyone a better idea of the expectations associated with the performance and your ability to accommodate. This practice can help structure your planning meetings and might prevent your programming board from committing to an event more expensive or extensive than they, or the institution, had anticipated.
- Second, prepare and share with your campus security department a list of the venues your potential artist has played in recent months. The security staff can use their resources to investigate audience history associated with the performance and help you assess just how helpful the performers might be should you need to call on them for assistance in an emergency. This information is invaluable in planning the structure and procedures you will use at the venue entrance and give you an indication of what behaviors your staff might expect during the event.

Lesson Learned?

The more information you have before you bid, the better you can respond in negotiations and the more control you can retain over your events.

Knowing the production needs and risk history of your artist up front makes you a smarter sponsor/producer and your program planning more intelligent.

Play “What If ...”

It's simple, it's fun, it's important. Take the time during your planning process to include this important activity. Here are some examples:

- What if we loose power ... someone passes out in the middle of the audience, or ... faints right up against the stage barricade?
- What if there is a bomb threat ... a fire alarm goes off ... there are crowd surfers...or a mosh pit forms?
- What if the performers are found to have drugs or weapons ... someone in the audience has a weapon ... people show up with cameras and by contract they are not permitted?
- What if there is a blizzard ... a severe thunderstorm ... a delay in opening the doors?

The more you play “what if,” the less you will have to play it in the future. One of the great things about this exercise is that the responses automatically become part of your institutional memory and eventually part of your program planning process. However, regardless of how

many programs you have organized, asking if there are any additional “what if’s” that should be addressed should always be on your planning agenda.

Lesson Learned?

Playing “what if...” pays off.

Maybe not for this program, or even the next, but you can be sure that every “what if” you think of will happen sooner or later. The real problem comes when you find yourself wishing you had planned for the one “what if ...” you missed.

Build the Staff—Train the Staff

As with everything else, each campus is different when it comes to the makeup of the staff that actually manages and runs an event. Many, if not most, of our campuses do not have the benefit of having professional event management personnel or the ability to contract for such services. So where does that leave us? It leaves us with “T-Shirt Security,” i.e. using students in the role of event staff.

While this might seem a risk in and of itself, with proper training and supervision, a student event staff can be efficient, effective and a real plus for program planners. In most cases, student event staff will know the performer, know the audience and most importantly, know what to expect when the two come together. In addition, students tend to listen to other students giving them directions. However, no student is prepared to assume this type of responsibility without extensive and thorough training.

What are some of the key elements to building a student event staff?

First, hire them as you would any other employee. Make it a campus job. Concert boards or volunteers should not be used for security or event management. Those students can take the tickets, provide hospitality to performers, introduce the show and be very visible, but they cannot provide security. If you are going to be able to keep the student event staff's eyes on the audience where you want them and not on the performance, they have to be trained, motivated and accountable.

Since these positions do not provide a very regular income, recruiting them is not always easy. Students will tend to want the job for all the wrong reasons—many times simply to see a show. However, this can change when the position brings with it a certain amount of status in the community. To achieve this, you might consider tying the event staff position to other campus jobs. Go out to campus employers and ask them to nominate their best student employees to be invited to interview for service on the event staff. This approach gives the position some status among students and provides a built in level of accountability. For example, if a student's performance on the event staff is being reported back to his/her regular employer, there is an additional motivation for doing the job well.

After selecting your staff, train them, train them and then train them some more. Engage the experts on your campus to be trainers, again bringing them into your event as a stakeholder. Develop a printed staff manual explaining positions and expectations. Be sure that every student on the staff has been trained to handle every type of job they may be asked to perform, from handling lines and checking bags to catching crowd surfers coming over the barricades. They need

to know what to look for during a performance and how they are expected to respond. They need to practice the “what if’s” you have identified. They need to know when and how to call for assistance and how to communicate with emergency responders who may be present.

The event staff member needs to know not only what to do, but what NOT to do:

- Not to watch the show
- Not to ask artists for autographs
- Not to leave their posts unless relieved.

They need to be practiced, informed, and trained to be professional “T-Shirt Security.”

Finally, a staff needs the right equipment to do its job. They need:

- Quality flashlights and communication devices
- Protective identifiable outdoor gear appropriate to the weather
- Earplugs for those working in close proximity to speakers.
- And those T-shirts. This is no time to be subtle. They should be in bright colors (black disappears in a crowd), appropriate to the season and venue, and printed on both front and back with glow-in-the-dark inks. As a final consideration, don’t give your student staff their shirt to take home. Unless you can afford to print new apparel for each event and don’t ever intend to repeat a design, allowing T-shirts to walk is as good as giving out a free ticket to every future show. That T-shirt says I have authority here, I have access and I work for the college/university. Its credibility must be protected.

Lesson Learned?

If you don’t or can’t use professional security personnel, you can build a student event staff that performs in a professional manner.

Including professionals as trainers and having high expectations of students builds an event staff that has credibility with your audience, your safety and emergency responders, road managers and performers.

Know Who’s in Charge

There are myriad things that can go wrong before and during a major campus event. When they do, it is imperative that everyone involved understands the decision-making “chain of command.” In the middle of an event is no time to be having debates. Decisions must be made, adhered to and debated later during post-event evaluation sessions.

Planning, like all elements of program management, is the key to decision making. Before event planning begins, contracts and riders should be examined and negotiated to assure venue control over safety and audience management. When planning begins, everyone can have input and each decision can be discussed. With the exception of safety issues, fire code parameters and local state and federal regulations regarding large gatherings, planning decisions can usually be achieved by consensus. However, when the event is happening, consensus is no longer an option. By establishing a functional control center, staffed by key players from key areas, an environment of clear decision-making is established and maintained for the duration of a major event.

The ideal event control center is staffed by one decision maker from each key stakeholder group, i.e. the sponsoring group, student activities/university staff, security/police, emergency responder/ambulance dispatcher, physical facilities/venue staff and, when appropriate and possible, a representative of the artist. This small group must be empowered as the decision makers for the event. They should monitor all communication between and among the staffs and, in case of emergency or problems, are able to communicate directions to their staff for an appropriate response.

Lesson Learned?

The number of decision makers and the decision-making process narrow in direct proportion to the time in which a decision needs to be made and its proximity to the program.

Program planning is everyone’s business but ultimately that plan will place responsibility for management in the hands of a few individual people.

From Checklist to Lifesaver

Every one of these lessons was instantly brought to bear when Binghamton University’s staff encountered an audience member who collapsed from an illness in the middle of a large audience during an outdoor concert. The student event staff’s initial report was relayed through the control center to emergency responders and all related personnel. The music stopped and the artist asked the audience for assistance, the police and event staff moved from their posts to clear the area around the victim and a path to where they knew the emergency responders were stationed. The EMTs moved quickly from their post into the audience and treated and transported the patient. Everyone returned to their posts, the artist thanked the audience, and the concert continued.

Without planning, training and clear communication between sponsor, artist representatives, road managers and all concerned departments, the outcome for the affected audience member may not have been so positive. Bottom line: Risk management and effective event planning go well beyond a checklist. In teaching and learning important program planning lessons, you might not only be preparing for a great event, you might be saving a life.

About the Author

David Hagerbaumer is director of Campus Life at **Binghamton University (NY)**, where he is also an adjunct professor in the School of Education and Human Development. He previously served as director of Campus activities and Orientation and assistant director of Campus Activities at the school. He holds a master’s degree in education from Bowling Green State University (OH) and a bachelor’s degree in English/education from Elmhurst College (IL). He is a founding member of SUNY College Unions and Campus Activities Professionals and is also affiliated with NACA, the National Association of Student Personnel Administrators, the National Orientation Directors Association, the Association of College Unions International, the American College Personnel Association and the Association of Fraternity Advisors. He has presented at ACU-I and NASPA, in addition to other organizations and events. He has earned two NASPA Region 2 Innovative Programs Awards, in addition to other public service and recognition awards.