
Chapter 3

Event project planning

Learning objectives

After reading through this chapter you will be able to:

- Explain the reasons for application of project management principles to event management
- Discuss the topic of scope management in project design
- Analyse the evolutionary nature of the event organization
- Describe the responsibilities of functional area project teams
- Describe the responsibilities of zone area project teams.

Introduction

The previous chapters have looked at some of the unique characteristics of the event environment that provide challenges for managing people in this dynamic and sometimes highly creative environment. This chapter will take a project management perspective, using some of the terminology widely used as part of the Project Management Body of Knowledge (PMBOK™).

There is some debate about the suitability of this framework for event enterprises because they are creative and organic (Goldblatt, 2005a; O'Toole and Mikolaitis, 2002; Van der Wagen, 2005); however, it is important to recognize that the methodology and terminology of PMBOK™ are widely used in the event industry. This framework is illustrated in Figure 3.1. Tum *et al.* (2006) in their book on event operations management adopt a project management approach, the authors stating in the preface that 'each event is in fact a project, and the wealth of literature that is available on both operations and project management can be used to assist an event manager in the complex management of an event' (p. xxi).

Project management framework

A *project* is first and foremost a *temporary* endeavour undertaken to create a **unique** product or service (Project Management Institute, 2004). Temporary means that the

Project Management		
Project integration management <ul style="list-style-type: none"> • Project plan development • Project plan execution • Overall change control 	Project scope management <ul style="list-style-type: none"> • Initiation • Scope planning • Scope definition • Scope verification • Scope change control 	Project time management <ul style="list-style-type: none"> • Activity definition • Activity sequencing • Activity duration estimating • Schedule development • Schedule control
Project cost management <ul style="list-style-type: none"> • Resource planning • Cost estimating • Cost budgeting • Cost control 	Project quality management <ul style="list-style-type: none"> • Quality planning • Quality assurance • Quality control 	Project human resource management <ul style="list-style-type: none"> • Organizational planning • Staff acquisition • Team development
Project communications management <ul style="list-style-type: none"> • Communications planning • Information distribution • Performance reporting • Administrative closure 	Project risk management <ul style="list-style-type: none"> • Risk identification • Risk qualification • Risk response development • Risk response control 	Project procurement management <ul style="list-style-type: none"> • Procurement planning • Solicitation planning • Solicitation • Source selection • Contract administration • Contract close out

Figure 3.1 Overview of project management knowledge areas and project management processes, PMBOK™

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project has a definite beginning and end, which is typical of most events. The predetermined end of the project drives most of the planning, and in the case of events the end is the culmination of the planning and comprises delivery of the event. In many other projects (such as engineering and software) the activity can peak earlier. The second feature of projects is their uniqueness. They may carry repetitive elements but this does not change the unique nature of the final product. For example, each Golf Masters championship is a unique event, and staging each contest is a project in its own right.

From a human resource perspective, it is well worth considering the role as that of *Project HRM*, with the emphasis on organizational planning, staff acquisition and team development that goes with every project. The terminology of PMBOK™ is useful, for example, the concept of *scope* can be used as the sum of the products and services provided as part of the project. If human resource management (or, more commonly, workforce planning) is a functional area (FA) providing specialized activities related to event staffing, a question of scope would be whether providing uniforms is one of the activities of this functional area. In the hot house of event

planning, there is often much debate about the scope covered by functional areas. People are constantly trying to shift, reduce or expand responsibility. Some men and women are heard wailing 'it wasn't in my scope' on the way to the crying room (more on stress management later).

Using mega events as an example, human resources/workforce planning is not responsible for developing every job description; these lie within the scope of each functional area. In the same way that a project has to be delineated, the scope of each FA has to be defined in a logical way. Scope involves subdividing the project into deliverables: recruitment targets, training plans, policies and training sessions.

Events such as the Asian Games and Commonwealth Games follow the precedent set by the Olympic Games and offer three levels of training to the workforce:

- 1 Orientation training – general information about the event, its history and the event programme. This training is usually delivered on a large scale.
- 2 Venue training – this training is run at the venue (competition or noncompetition) and covers the layout of the site, emergency evacuation, incident reporting and the like.
- 3 Job specific training – this training is at small group or individual level, providing detailed information about the tasks to be performed.

This work breakdown provides a good example of how the scope of the training subproject is organized. In this case, orientation training would be the responsibility of human resources (a key deliverable), while the venue management team (with advice from HR) would plan and run venue training. Finally, job specific training would come within the scope of a particular functional area within the venue, for example, the merchandising team at the stadium.

Design before detail

Before project scope management commences, the main focus needs to be on the event design. As Brown and James (2004, p. 59) point out, 'design is essential to an event's success because it leads to improvement of the event at every level ... Event design is the critical component, underpinning every other aspect of the event, and central to the event design are the core values of the event'. They list the design principles as: scale, shape, focus, timing and build. In many ways this part of the design relies on theatrical concepts and anticipates the audience response. The authors argue that while it is important to be systematic in planning, event managers often concern themselves too much with logistics and budget, leading to a 'one-dimensional' event. (For advice regarding the staging of an inspirational event, see Goldblatt (2005b) and Malouf (1999).)

It is important to be mindful of this concern as project management principles are implemented. While the tools and techniques of project management are useful, they should not dominate to the extent that they compromise creativity and hinder change. Finally, before looking at project management phases and organization charts, it is well worth highlighting this point in relation to human resource management – people can contribute to the event's design. Shone and Parry (2004) describe this as ambience and service. The way people dress and behave will determine to a



The set-up of an exhibition hall requires careful logistics planning

large degree the audience response. The most memorable event experiences are magical, and people make this magic.

Human Resource Project Management

Following the logic of project management, once the event project is initiated, scope planning begins. Typically, organizational planning follows several phases; in this case four stages have been illustrated: strategy, operations (functional), operations (venue/site), and implementation (event delivery). There is of course the final wrap-up stage (also known as closedown or divestment) during which reports are written, bills paid and contracts acquitted, but this has not been discussed below as there is usually only a small team remaining to complete these tasks. Evaluation of an event is vitally important, too, particularly the success of human resources strategies.

Stage 1 – strategic planning: concept and feasibility

At this early stage of event concept development, when ideas are tested for feasibility, the organization (which is usually a committee) is generally quite organic. Flexibility and role sharing are important features of this early phase when committee

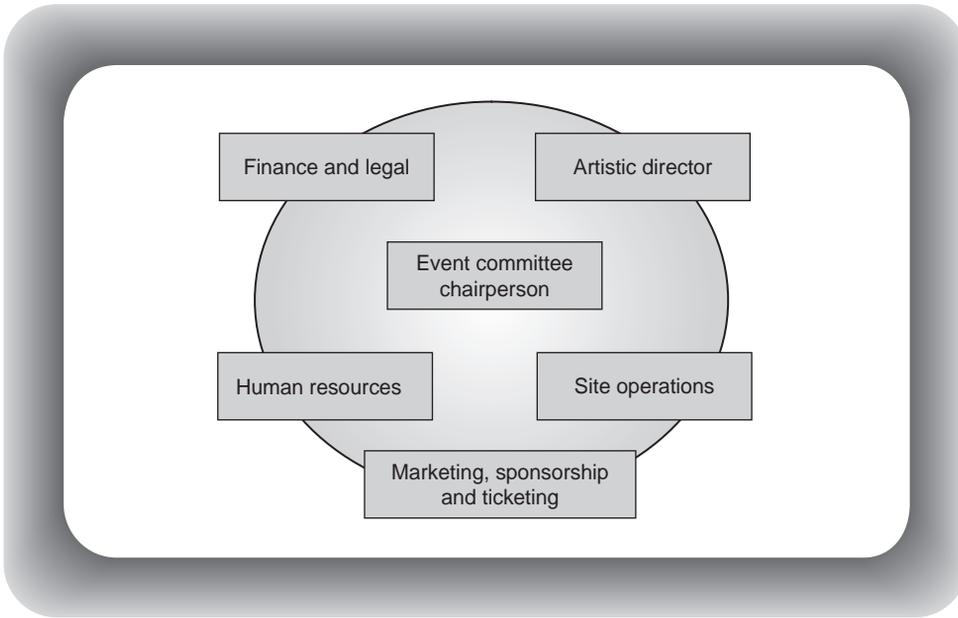


Figure 3.2 Event committee

members are in a creative frame of mind, although this has to be tempered with reality. This being the case, the structure can be illustrated with a circular diagram (see Figure 3.2).

As mentioned in the previous chapter, this phase would also include evaluation of the external and internal environment. For human resource management this would involve an analysis of labour force statistics, community attitudes towards volunteering, industrial relations issues, affirmative action programmes and so on.

Stage 2 – operational planning: functional focus

During the next phase of event planning each of the functional areas begins to set up the infrastructure for the event. The manager responsible for security and risk management would, for example, look at the scope of work involved in providing security services for the event. These might include searches at entry points, patrols, observation of the field of play, use of CCTV, and incident and reporting systems, requiring close liaison with a number of external stakeholders such as police, first aid providers and emergency services. At this stage a decision would be made about outsourcing security services and a contractor would be selected by tender. In order to tender the contract, the scope of work would have to be quite clear for the competing tendering parties.

In the simplified chart shown in Figure 3.3, the functional area managers would report to the event manager. A more sophisticated chart would also show the key stakeholders (perhaps in a different colour) such as sponsors, emergency services, etc. Relationship lines for stakeholders in the chart are just as important as reporting lines for paid staff. For example, sponsors are often vital to the success of an event and the event manager could decide that the naming rights sponsor has a direct relationship with him or her. The alternative would be for the marketing manager to deal with all sponsorship arrangements. It is most helpful to add these stakeholders to the chart, using dotted lines to show *relationship* rather than reporting.

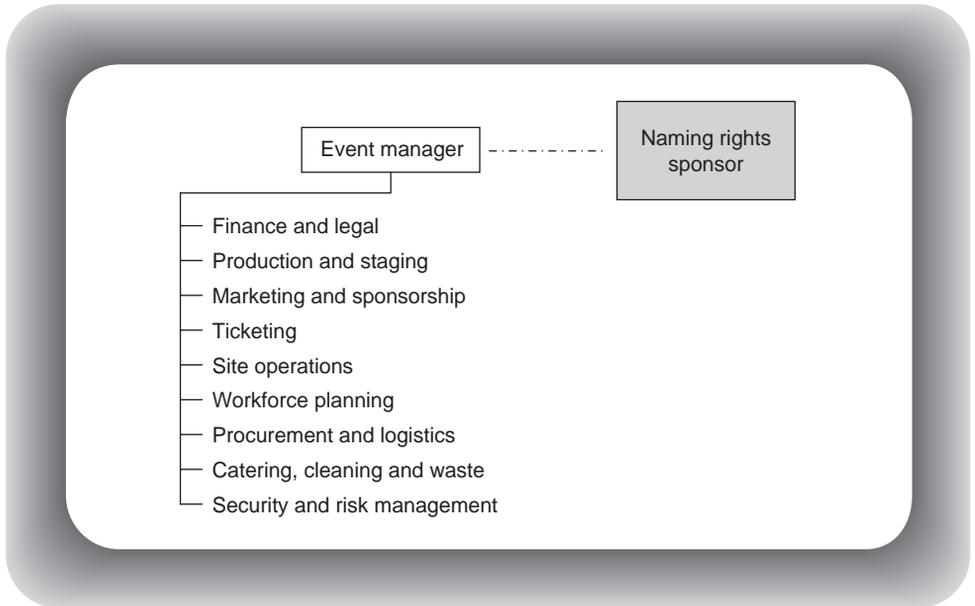


Figure 3.3 Functional area reporting

Stage 2 is part of operational planning. Each functional unit must decide what needs to be done to meet the strategic plan. Whereas the strategic plan focuses on *what* needs to be done, the operational plan deals with *how* it is to be done. An operational plan:

- is a description of how objectives will be achieved
- includes information about the resources that will be required
- indicates a timeline for project progress
- provides the basis for action planning at the next level down.

While there are advantages of using a functional structure such as the one illustrated in Figure 3.3, Bowdin, O’Toole, McDonnell and Allen (2001) point out that there are pitfalls associated with a functional structure. These include functional managers losing sight of the big picture and the organization’s objectives while they focus on their own specializations; staff having little understanding of other functions, leading to lack of co-operation or integration; and heavy reliance on the event director to co-ordinate the activities of the functional areas.

In addition to co-ordinating activities within the event organizing workforce, the event director, or their delegate, must co-ordinate activities with external stakeholders. The Chelsea Flower Show will be used as an example to illustrate the roles of, and benefits accruing to, the various stakeholders:

- *Host organization.* Events such as the Chelsea Flower Show are often hosted by an association. In this case the Royal Horticultural Society (RHS) is the gardening charity host and the Chelsea Flower Show is just one of many events in their calendar of operations. The RHS has a wide scope of operation in its events.
- *Sponsors.* Most major events have several sponsors and these can range from a naming rights sponsor through to various levels of gold, silver and bronze sponsorship. Sponsors generally expect media exposure, hospitality at the event and

- sales, if their merchandise is available to purchase on site. This is done in return for financial or value-in-kind support, where the sponsor provides, for example, the motor fleet, telecommunications system or the information technology services. In 2005 the Chelsea Flower Show sponsors included Merrill Lynch, Renault and BBC.
- *Broadcast organization.* For many international events, the broadcast element is critical as many more viewers watch these events than attend them. Broadcast rights are sold before the event, and for mega events this is the main source of income for the event after ticketing. The BBC is a sponsor and broadcaster for the Chelsea Flower Show.
 - *Beneficiaries.* Where the event contributes substantially to a charity, the design of the event must be compatible with the charity's values. For the Chelsea Flower Show the main beneficiary is the Royal Hospital Chelsea, a home for old soldiers.
 - *Exhibitors, concessions and other businesses.* An event may involve numerous exhibitors and provide commercial outlets for catering and retail sales. At the Chelsea show there are 450 commercial exhibitors.
 - *Contractors.* Many event operational services, such as cleaning, waste management, lighting and sound, are provided by contractors. Hire companies provide temporary seating and many other elements of the event physical infrastructure.
 - *Government.* Approvals are required for all manner of things including arrangements for transport, parking and traffic management.
 - *Police, first aid and emergency services.* Working with these providers in the lead up to the event is vitally important as these services are the first point of call if there is a major accident or incident.
 - *Community.* Liaison with the community is essential, as many small businesses enjoy increased trade during an event. Some government authorities have specific procedures for notifying the local community of the event and managing community relations.
 - *Customers.* From a marketing viewpoint, analysis of consumer behaviour is part of the strategic marketing plan, which in turn leads to finalization of the event product, including sales and customer service.

Stage 3 – operational planning: zone, venue or precinct focus

As the event draws near and it becomes possible to see its physical layout, the structure moves to a geographical style, generally based on zones, venues or precincts. In the language of mega events this is known as 'venuization'. During this stage, a manager from the organizing committee 'takes over' the venue and installs the infrastructure (also known as the 'event overlay') for the upcoming event. If there is more than one sporting competition, for example, being held at the venue, this overlay might be changed from, say, gymnastics to basketball.

However, this occurrence is rare and the terminology is not suitable for smaller events where the incumbent venue manager typically retains his post. For example, for a music festival held in a park, the event director would work with the park manager at every stage of planning.

Figure 3.4 shows the layout/map of the Good Vibrations Music Festival and Figure 3.5 shows a simplified organizational structure for the execution phase of this event. As can be seen from Figure 3.5, when planning the organizational structure, Laundry, Good Vibrations and Roots stage would each require a manager, as would the food services and the amenities areas.

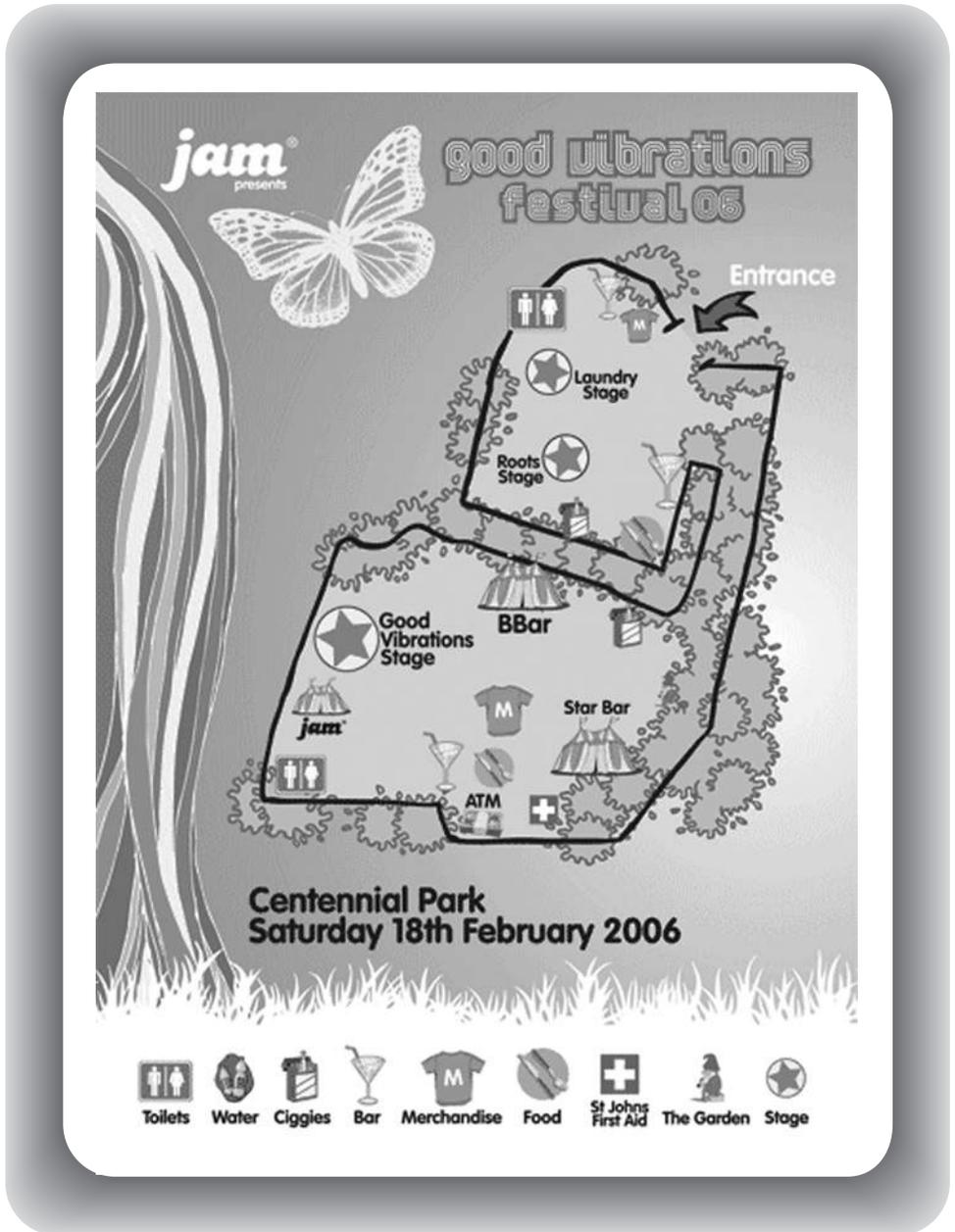


Figure 3.4 Map of Good Vibrations Festival
(Reproduced with permission of Jam®; for further information see www.jammusic.com.au)

As mentioned in the previous chapter, for the purposes of this text these project managers are known as zone area managers (ZAs). There are a number of reasons for this, the main one being that management of a physical area is logical from both an operational and a financial point of view. Imagine, for example, a show offering a commercial exhibition area, competition area, entertainment area and catering area. These areas would be labelled as clusters, precincts or zones and each would

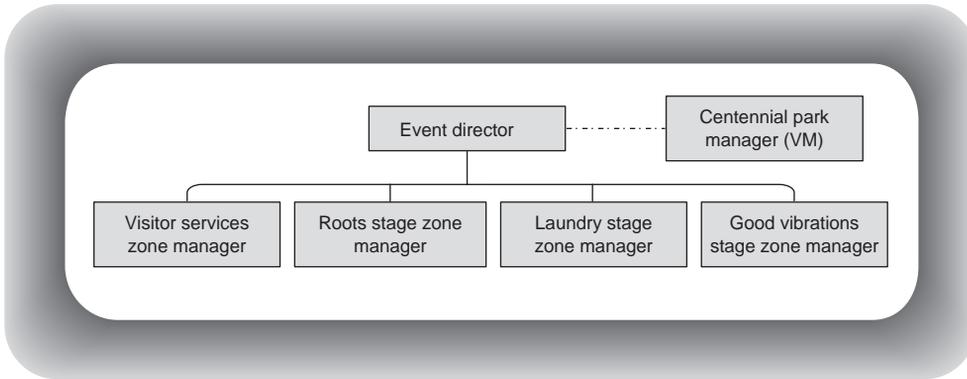


Figure 3.5 Zone managers reporting to the event director

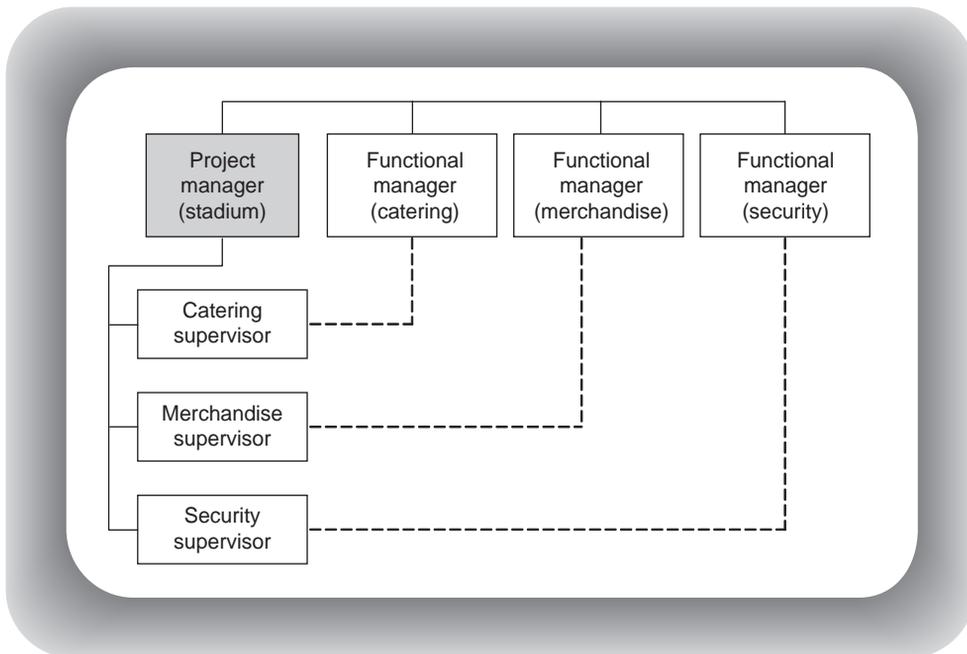


Figure 3.6 Matrix structure for zone area management (cross functional team)

become the responsibility of a zone area manager. This simplifies decision making and also allows for the use of cost centres for financial purposes. In this way costs, such as staffing, security and information technology, can be apportioned to the zone and their effectiveness evaluated post-event. In project management terms this is now a 'projectized' organization with projects comprising cross-functional teams.

Figure 3.6 shows a matrix organization in which the dominant manager is the manager responsible for all events at the stadium. On his team he has supervisors representing functional areas such as catering, merchandise and security. While each of these people has a direct reporting relationship to the stadium manager, they also

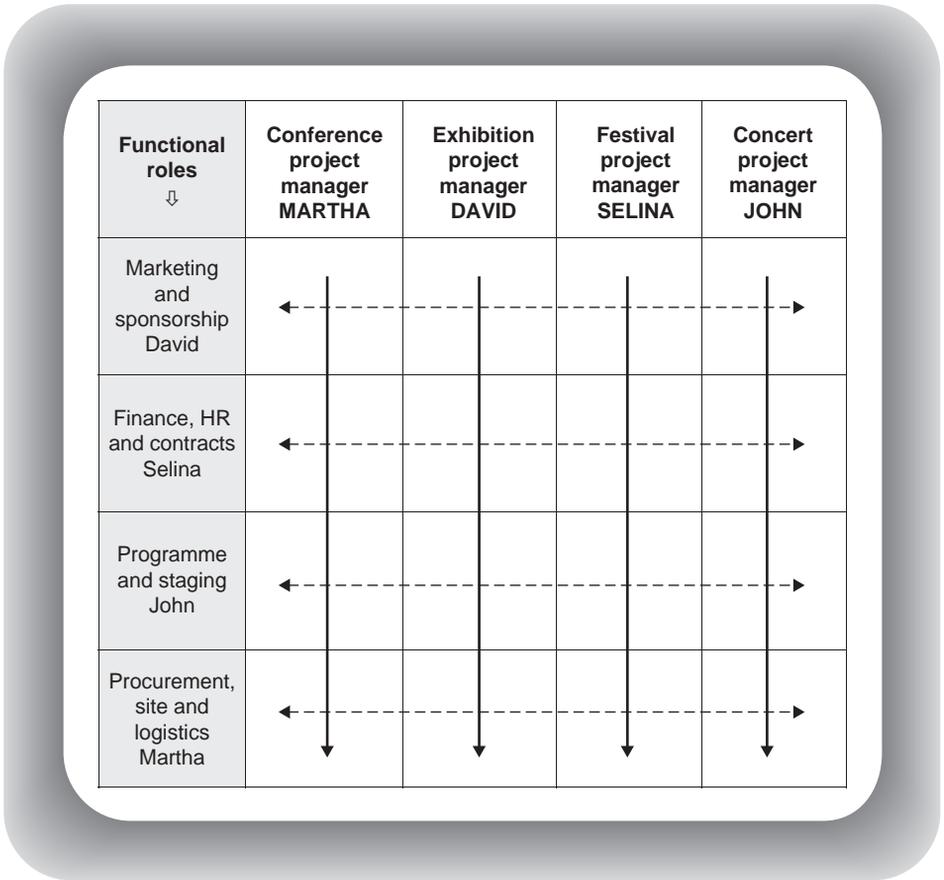


Figure 3.7 Matrix organization chart for a small event management company

have a secondary reporting relationship to their functional area manager. So, for example, if a technical security issue were to arise, the supervisor might contact the functional area manager in charge of security for advice. This is similar to staff and line reporting relationships in traditional business environments.

These concepts don't only apply to the big end of the event business. Figure 3.7 shows a very small event business comprising an owner/manager and four full-time members of staff, each a specialist in a particular functional area. This is also a matrix organization structure in that each person has dual roles. As can be seen from the chart, the dominant role for each person is that of project manager for one of the four events currently on the organization's agenda. These are a conference, an exhibition, a festival and a concert (these are used for illustrative purposes only as it would be unlikely that such a small business would diversify to this extent). As Figure 3.7 shows, each member of the team has a project management role but each also contributes his or her specialist expertise to the other events. Thus, for example, David is a marketing expert and provides this support across all events, while at the same time he has overall project management responsibility for the exhibition. Once again, the solid and dotted lines show reporting relationships – one ignores the bit where one reports to oneself!

Stage 4 – implementation: event delivery

Once the event is at the stage of implementation, a chart is needed to show everyone on site who is who. For this reason, every contractor needs to appear on the chart, as do all stakeholders, such as police. The chart, or a simplified parallel chart, needs also to show what to do when a minor incident or an emergency occurs. Generally there are shorter lines of communication if there is a crisis and this can be shown as an insert in a corner of the diagram.

From a human resources perspective, the important feature of such a chart is its value to the internal customers – all the people included in the event workforce. The event chart is a communications device and needs to be comprehensive as well as user friendly. As with maps of the event layout, professional design will ensure that these charts will be valuable and useful inclusions in the training manual.

Figure 3.8 shows an organization chart for a planning team prior to an event; Figure 3.9 shows a chart for the day of the same event for comparison.

Project deliverables for human resource functions

Looking at human resources from a project management perspective, there are a number of processes required to make the most of the people involved in the project. For a major one-off event the following deliverables would be seen as part of the human resources function. Each of these would be presented as a report or action plan.

For the whole workforce:

- External labour force analysis to identify shortages and skills gaps
- Review of relevant industrial legislation and compliance issues, such as equal employment opportunity (EEO)
- Job analysis based on work breakdown planning, including organization charts
- Job design and allocation of roles to paid and volunteer staff
- Training needs analysis ranging from general to specific knowledge
- Occupational health and safety programme
- Workforce database management and time recording system
- Workforce policies and procedures documentation
- Leadership, motivation and retention programme
- Communications plan
- HR budget
- Post-event evaluation report.

For paid event staff:

- Recruitment plan
- Induction schedule
- Training materials and schedule for delivery
- Payroll system
- Performance management system
- Recognition and severance programme.

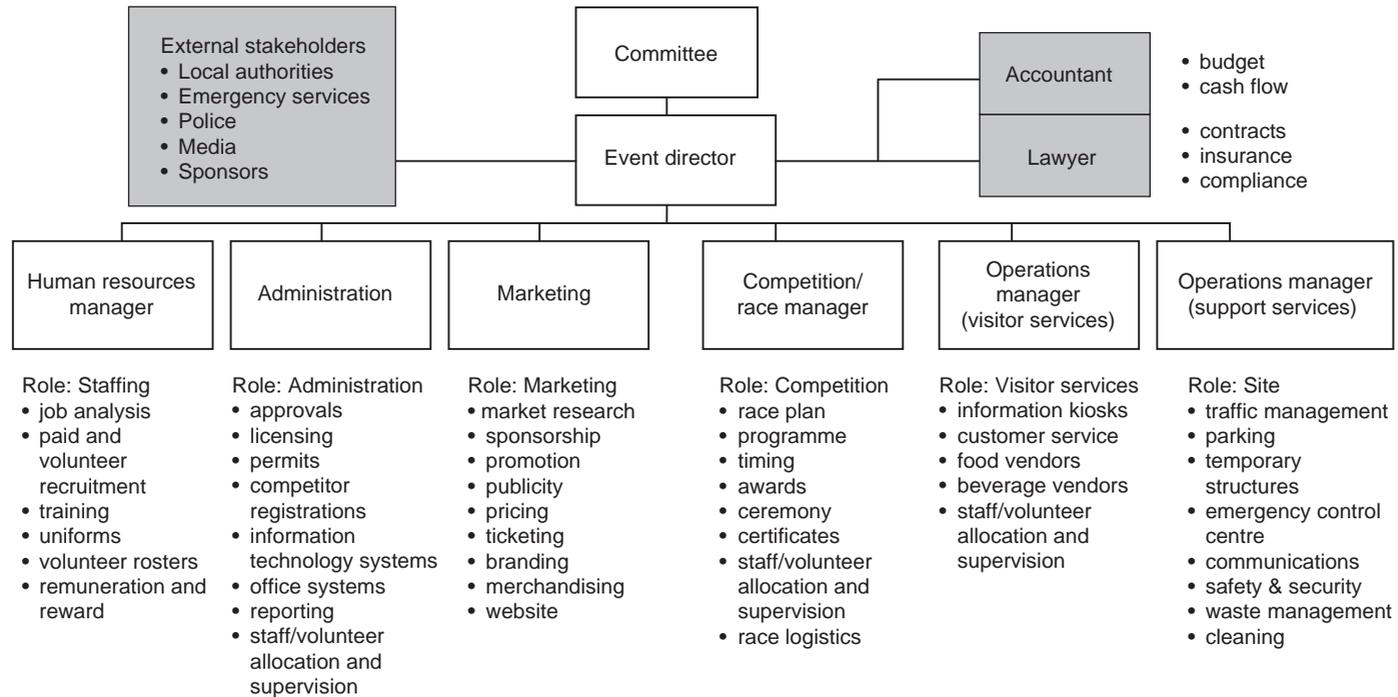


Figure 3.8 Organization chart during pre-event planning phase

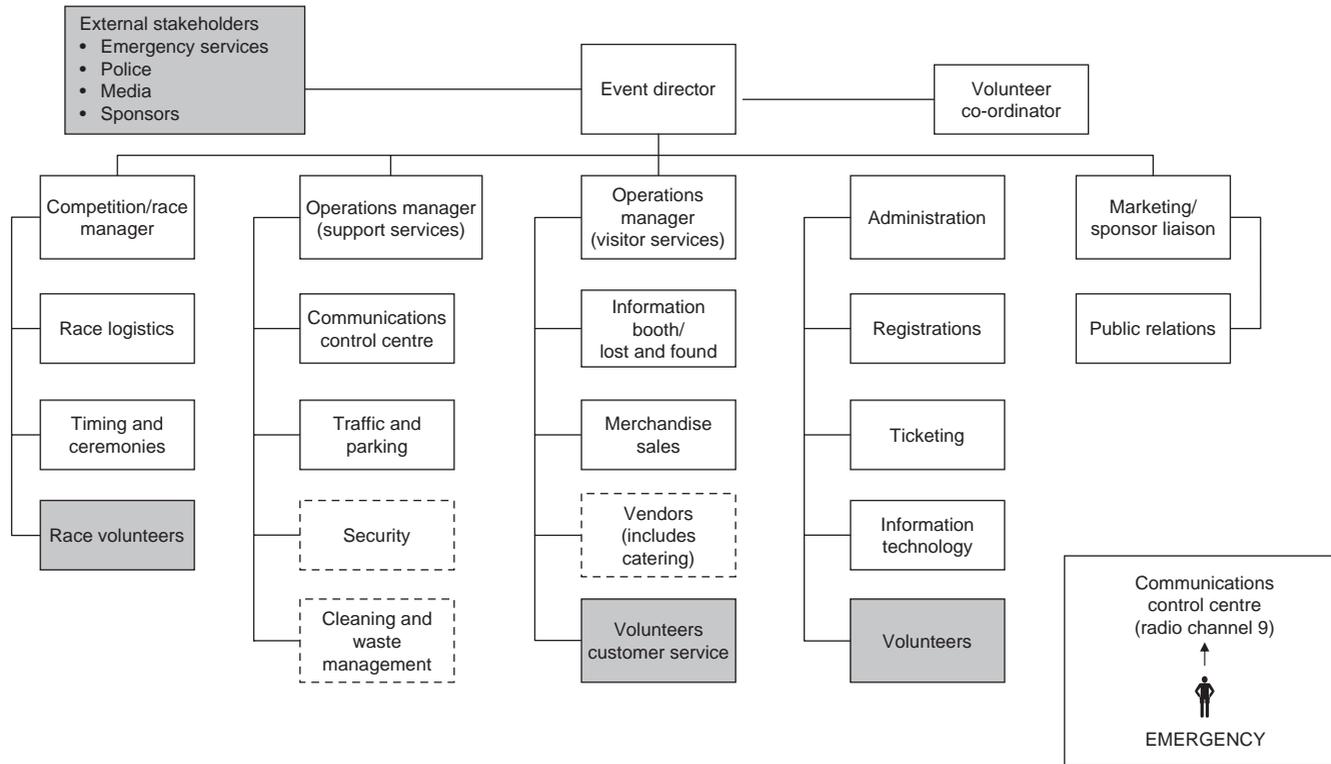


Figure 3.9 Organizational chart on day of event

For volunteers:

- Recruitment and selection plan
- Induction programme
- Training materials and schedule for delivery
- Recognition programme.

Optional involvement:

- Uniforms, design, manufacture, distribution
- Meals, including voucher system
- Accreditation system
- Transport plan for workforce.

In addition to the most obvious elements listed above, further demands may emerge over the course of the project as outlined below.

Selection of contractors and monitoring their staffing and training plans

As has already been mentioned, contract labour can form a large percentage of the workforce for events and for this reason this area needs close attention. Ultimately, these people will need to deliver seamless service to the event audience and thus need to be fully integrated into human resource planning for which training and recognition programmes are required. There are significant costs associated with these activities.

Educational programmes

In response to successful event bids, many governments provide funds to meet training needs identified by a gap analysis. This may be as simple as providing event-related information to transport employees working 'outside the fence' or it may involve a sophisticated programme of courses for upskilling. For example, training of apprentice chefs may be required or a plan may be necessary to import qualified people from overseas. Schools and universities are also keen to use major events in new curriculum initiatives and will approach the event organizer for assistance and support.

Involvement with sponsor HR planning

Sponsors frequently have their employees working on site and therefore need to develop their own event-related training. Moreover, some sponsors use the event to motivate staff, providing them with a range of tickets and hospitality options. These sponsor organizations may approach event human resources for advice in this regard. Training and motivational programmes for sponsor employees may need approval and support.

Working with stakeholders

The event human resource team may need to work with a range of stakeholders, the unions being the most obvious, but they may also include fundraising committees, volunteering associations, parent committees and partners. This requires an understanding of power and politics and an ability to exert influence to get things done in the interest of successful project completion, which is well illustrated in Case study 3.1.

Case study 3.1

Tour de France Grand Depart

Race against the clock for chance to take part in 2007 Tour de France

Following the announcement that London has won the right to host the 2007 Tour de France Grand Depart, applications from people wanting to play a key role in the world's greatest cycle race have come flooding in. Just five weeks since the route announcement, more than 1200 have signed up to marshalling the race in London and in Kent.

The incredible response that Transport for London (TfL), the co-ordinator of the event, has already received means that only a few hundred volunteer places are now left.

Volunteer marshals are being asked to help create a safe and enjoyable environment for the riders and spectators who will witness the Tour's first ever Grand Depart in the UK.

With almost 1000 junctions to marshal and three million people to help enjoy the race, approximately 2000 volunteers are needed to assist with managing crossing points, controlling and assisting the crowds of spectators, and ensuring that cars don't try to use closed roads.

Mick Hickford, Head of Special Projects at TfL, said: 'The Tour is not just the greatest cycle race but one of the greatest sporting events in the world and marshalling at the 2007 Grand Depart will be a unique opportunity for a whole generation of British cycling fans.'

'The fantastic response we have had to our call for volunteers demonstrates the incredible enthusiasm the British public has for hosting the start of the Tour de France.'

Robert Jefferies, Volunteer Support Officer at British Cycling, said: 'Volunteering is a brilliant way of getting involved in cycling and we will be giving specialist training for this role.'

'British Cycling hopes that the opportunity to marshal during the British stages of the Tour de France in 2007 will encourage even more people to get involved with the sport in this country, whether as participants or supporters.'

(Reproduced with permission of Transport for London; for more information see www.tfl.gov.uk/tfl/press-centre/press-releases/press-releases-content.asp?prID=725)

Reflective practice 3.1

- 1 What are some of the project processes that need to be followed to stage the Grand Depart in London and Kent?
- 2 Who are some of the stakeholders involved in Tour de France?
- 3 How would project management principles assist with volunteer planning for this event?
- 4 Why is this such a popular volunteering opportunity?

Standards for event management

Standards are described by the International Organization for Standardization (ISO) as a series of guidelines that through widespread adoption become de facto regulations. Standards in their own right are not mandatory, and there is current ongoing discussion on this topic. Julia Rutherford Silvers (2005) suggests that the event industry needs to adopt voluntary consensus standards for event management but

admits that in the United States it is a tall order to expect agreement on federal standards, much less international standards. This is the case in many countries.

The Event Management Body of Knowledge (EMBOK) is another international initiative, with the aim of developing a global curriculum framework for event management.

Despite difficulties associated with international agreement on common standards to cover the full scope of event management, there are three areas in which common practice is emerging across the globe. These are risk management, crowd management, and emergency planning. Readers were introduced to a risk analysis in the previous chapter.

National 'standards' on risk management first appeared in Australia and New Zealand in 1995, then in Canada in 1997 and in the United Kingdom in 2000. Other countries and regions (Europe) are currently studying similar standards and the International Standards Organization is preparing a list of common global definitions of risk management terms. The Australian and New Zealand AS/NZS 4360 Standard on Risk Management (2004 version) is widely used outside the Australasia region. Global concerns regarding crowd management are shared on the website (www.crowdsafe.com), with significant exchange between practitioners and researchers around the world. This website regularly features best practice legislation and guidelines. Planning for emergency evacuation in case of fire, for example, is also becoming increasingly consistent across the globe. The International Association of Emergency Managers provides the opportunity to become an accredited member.

When undertaking recruitment and training of event management personnel, it is essential to be mindful of the requirements of these standards.

For an organization working in an international arena this is particularly challenging. Studio Festi (see Case study 3.2) has most recently produced performances for the Olympic winter games in Torino and the opening of the Italian year in China. Each country has different legal requirements, standards and regulations, particularly for safety, which requires in-depth research when planning projects.

Case study 3.2

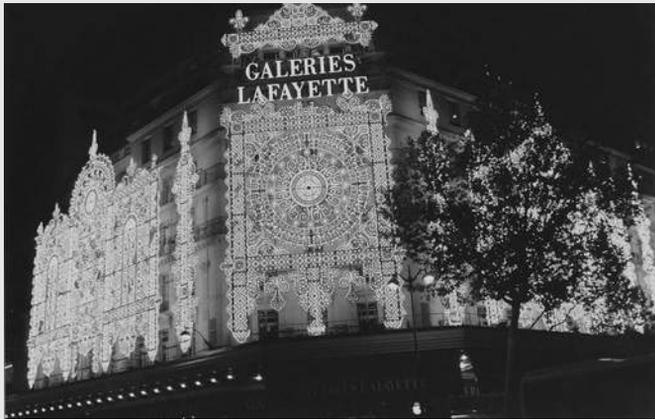
Studio Festi

Studio Festi is a well-known Italian organization that produces spectacular light shows. It has (over the last 20 years) produced breathtaking open-air performances in major cities around the world, including Tokyo, Madrid, Moscow and Sydney. This has involved outdoor lighting effects, mainly focusing on significant or historical buildings. Performances by air acrobats are often included.

Paris (France) – Galeries Lafayette

'Robe Lumière' Christmas of Light at Galleries Lafayette: for more than two months, from 6 November to 7 January, winter evenings and nights are lighted with 'Robe Lumière'. All across galleries facing Boulevard Haussmann, Festi is going to propose a new project of light's art, dedicated to Paris and Lafayette.

Something that elsewhere or usually is known as 'Christmas decoration', at Galeries Lafayette becomes a great project of Light's Art: a 'Robe Lumière' – original title of Festi's creation – ready to dress the historic and monumental 'admiral ship' of Lafayette for two months, transforming it into a new, great game of light's art: a dress, a stage costume, magic.



(Reproduced with permission of Studio Festi; for further information see www.studiofesti.com)

Reflective practice 3.2

- 1 Why would you describe this company's work as highly artistic?
- 2 How do you see project management principles applying to the design and operation of these shows?
- 3 From a human resource point of view, identify five challenges associated with staffing these events which travel the globe?
- 4 Identify three key deliverables for the person responsible for the human resource scope of these projects.

Chapter summary and key points

This chapter has introduced a number of project management concepts and has looked at the stages of an event project. Organizational design can vary for each of these phases, ranging from strategic planning through to operational planning and implementation. For the small, more collaborative type of event, no doubt the team is not conscious of these shifts in roles as the event draws near. However, even the smallest professional event company usually works on more than one project simultaneously and needs to use these planning tools.

In this deadline driven environment the work breakdown structure can contribute to, or inhibit, event planning. This structure needs to serve its purpose, assisting with the designation of responsibility for operational planning and facilitating a possible shift towards a different implementation structure. Ultimately, any diagram is a communication device and the human resource functional area contributes to and utilizes these diagrams for a range of purposes, including induction and training. Human resources play a vital role in managing transformation and change in the event environment.

Revision questions

- 1 How does an event (exhibition, conference, competition) meet the definition of a project?
- 2 List three types of training commonly delivered to the event workforce and explain who has responsibility for them.
- 3 Discuss the comment that 'using project management principles stifles creativity and limits flexibility, thus making events one-dimensional'.
- 4 Explain the concept of a matrix organization using an event example.
- 5 Provide examples of three standards relating to risk management or emergency planning.

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