



## Chapter 11

# Dealing With Logistics—Planning the Show

**A**fter you have conducted your assessment surveys, chosen the events your board will produce, and gotten approval for the budgets for your proposed and contracted events, you will need to concentrate your attention on the actual “nuts and bolts” aspects of producing these events. Several parts of the program planning process will occur simultaneously with, and be accomplished as part of, your contract and rider research and negotiation process. The two are often very interrelated and mutually dependent upon each other. Therefore, if different individuals are handling these separate aspects of the event planning process, clear systems of communication, filing and recordkeeping are essential if your program is to be produced successfully. This chapter will help you set up an Event Checklist and an accompanying Event File (Kane, 1999, p. 1).

### Event (Programming) Checklists

A key aspect of the concept of using a customized checklist is that doing so helps to create higher quality events from semester to semester, and from one programming board to the next. In addition, using the checklist and event file concept helps protect your programming board from risking a breach of contract, or default, which is what happens if some action, or lack of preparation, on your part causes the event to be cancelled. Default is a serious problem because it could place your school’s activity funds in jeopardy—at least for the remainder of your programming year. If your programming board defaults on a contract because it overlooked a significant technical requirement in a contract rider, for example, the programming board could be liable for the full artist’s fee plus any expenses incurred by the artist on your school’s behalf due to your failure to meet your contractual obligations.

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In addition, the programming board may be responsible for all expenses incurred in preparing for the production of the event. Catering, venue rental, and certain artist travel and accommodations expenses may have to be paid anyway—all for an event that may have been cancelled only one or two days before it was to take place! As a programmer, you can minimize the possibility of this occurring by maintaining good files, saving all notes, copies of riders and any written communication with the artist or agent.

A checklist will assist you in the planning process by listing the numerous event planning tasks, which are then checked off once they have been completed. The checklist will allow you to see at a glance your board's progress as it prepares to host an event. Naturally, the checklists your programming board creates will be tailored to meet the needs of your school's program planning process. A sample programming/event checklist appears in Example 11.1. A complete set of sample programming checklists can be found in Appendix A. Your programming board can use these sample checklists as templates for designing its own set of customized checklists, which will vary according to the type of event.

### “Backwards Planning”

In addition to using programming checklists, you should utilize a “backwards planning” process, which is helpful because it points out any details that might otherwise be overlooked. Backwards planning involves planning your event from the end to the beginning. By doing this, you will know how far in advance you must accomplish each of your checklist items based on your individual campus policies and procedures. To backwards plan an event, determine how long it will take to accomplish each item on the checklist and then determine when the item must be completed. Enter this completion date in the “Date to be Accomplished” column of the checklist (See Example 11.1). To ensure that you begin this task with adequate time for its com-

pletion, enter a start date on the programming timeline for the event.

### Agency Contact and Program Approval

One of the first items on your checklist is your initial contact with the agency with which you will do business. Having already established a date for the program, you will then call the agent and confirm whether the artist is available for the projected date, or dates, on which you would like to host the event. During this first contact, you also request copies of the contract riders to verify your ability to produce the event. After you review the riders and confirm all related technical, hospitality and travel costs are within your event's budget, you communicate your interest with the agency and ask if they would “pen-

POPULAR CONCERT CHECKLIST			
Event _____			
Location _____			
Date/Time _____		Event Coordinator _____	
Artist _____		Agency _____	
Artist Contact Person _____		Phone _____	
Agency Address _____			
	Person Responsible	Date to be Accomplished	Date Accomplished
<b>Agency</b>			
First Contact			
Hold on Date			
<b>Program Approval</b>			
Program Proposal Submitted			
Budget Proposal Submitted			
Program/Budget Approved			
<b>Contract</b>			
Reviewed by Program Director			
Reviewed by Attorney			
Addendum Attached			
Contract Signed			
Contract Sent			
Contract Returned			
<b>Facilities</b>			
Reserved			
Confirmed			
Set-Up Design Submitted			
Dressing Rooms Reserved			
Other			
(1)			
(2)			
<b>Equipment</b>			
Sound Arranged			
Sound Check			
Lighting Arranged			
Tables/Chairs			
Props			
Supplies			
Special Equipment			
(1)			
(2)			

Example 11.1: Popular Concert Checklist (Page one of three pages). A complete version of this checklist, plus a set of other programming checklists, are reproduced in Appendix A.

cil in” your school to hold the date. Like most agencies, yours is willing to do this for a brief period of time.

If you are co-sponsoring the event with another organization, you will need to have ironed out the details of co-sponsorship early enough to allow each organization’s members time to divide up event responsibilities, or to form joint committees. For a discussion of co-sponsorships, their advantages and disadvantages, see “Program Co-Sponsorships Can Address Needs Identified in Evaluation Processes” in Chapter Three.

## A Suggested Program Planning Timeline

The remainder of this chapter describes a suggested program planning timeline, which your board can use to develop its own customized timeline.

### Four to Six Weeks Before the Event

The next several steps will probably occur simultaneously, or in quick succession. These steps are summarized in the following list, which includes a detailed discussion of several of the technical aspects of program planning.

- Contract and rider review and negotiation—You will need to track all stages of the contract, from review by the program director to review by the school attorney(s), addendum (sponsor rider) attachment, as well as when the contract was signed, sent and returned.
- Process payment for the artist(s).
- Facilities reservation and communication of set-up design—Make sure you have communicated any specific set-up needs for the event to your facility manager. Be sure to give him or her plenty of advance notice regarding the artist’s needs. For example, a band may need several microphones and chairs set up for their performance, or a concert pianist may require a particular brand of grand piano.
- Equipment reservation/rental and scheduling of sound and lighting checks—Communicate any equipment needs, such as sound and lighting to the facility manager. Again, give him or her plenty of advance notice. It might take two or three weeks to locate a particular type of lighting system if a similar one is not readily available in your area. In addition, you will need to verify that the facility will be open and available for necessary sound and lighting checks prior to the actual performance time on the day of the show. At this time, you should confirm the availability of a technician for trou-

bleshooting purposes, if this is necessary.

- Plan promotional strategies for the event—Be sure to note the receipt of promotional materials from the artist or agent. Begin planning a comprehensive publicity campaign utilizing campus newspapers, newsletters and campus cable networks. When working with the media, make sure you meet their deadlines so they can carry your information. In addition, involve your school’s public relations office whenever possible. Your advisor can help you develop a relationship with this office and allow them to assist you with the creation of publicity materials. Also, be sure to track any work sent off campus to local printers or sign makers.

### Venue and Technical Considerations

At least a month before the show, you should be confirming and finalizing all the necessary sound, lighting, stage, and equipment requirements for the event with your venue’s facilities manager or technical director. Along with confirming the reservations for the performance venue, check whether renovation work—or use by another group—is scheduled that could affect equipment load-in, load-out or stage set-up. When you meet with the technical director, confirm that the existing equipment is in working order. Be sure to go over the condition of microphones, tape and CD decks, the main sound board, amps, speakers, stands and cords. Test the lighting for effectiveness, checking dimmers and colored gels. As you walk around the stage, examine and measure it, as needed, going over all the technical rider requirements with the technical director. Confirm that any musical equipment your school is providing, such as a piano, is in tune and in good working condition.

At this point, discuss your estimate for volunteers or paid technicians with the technical director and confirm whether you have planned for enough crew on show day. When you are sure of the number of volunteers you will need, begin recruiting them right away. It will be a good idea to also line up a few alternate, or backup crew members, in case your scheduled volunteers are unable to work the event. If a crew rehearsal or training session will be needed, schedule it now so you may give your volunteers as much warning as possible. Depending on the nature and size of the event, you may need a stage crew (for set-up and tear-down), a light crew (for set-up and tear-down), a running crew (to help run the event itself), a house manager, ushers and ticket sellers.

As you meet with the technical director and arrange for the items listed in the technical rider(s), begin to draw up detailed lists of specific lighting arrangements

or sequences, lists of stage cues for the technicians, and the location and source of any equipment to be rented or borrowed. Check to see if the ventilation system is noisy and whether or not the artist will need it to be turned off for any portion of the performance. List or number any complimentary tickets required by the artist/agency, and plan to have reserved seating roped or marked off, if necessary.

### Liability and Risk Management

Your programming board will need to factor in risk management, security and liability into its planning for almost any event it produces. The changing nature of programs and events is only part of the growing trend of increased liability for schools and programming boards. As a programmer, you are charged with minimizing the chances that spectators, participants or artists will become injured or suffer a loss of some kind.

According to Frank Julian (1997), most lawsuits and liability result from some sort of negligence. Therefore, he suggests that as a student programmer, you must strive to meet three goals, which are paraphrased below:

1. Discuss risk, liability, negligence, risk and crisis management as a core element of student and staff training programs.
2. Identify potential risks and work to minimize or eliminate the danger before and during events (risk management).
3. Be prepared to respond adequately and appropriately in the event that things go wrong (crisis management).

### Designing a Risk Management Training Program

One of the most effective ways your programming board will be able to address these liability issues is to implement as many of the following suggestions as possible. These tips summarize several of Bob Beodeker's (1999) suggestions to campus programmers.

Student programmers should consider inviting a lawyer to conduct an annual training program on the legal definitions and principles of risk, negligence, and liability. At the same time, or in a follow-up training session, your programming board can be educated about your school's insurance arrangements. Items

that every student programmer needs to know include learning who needs to be consulted when events are being planned and contracts negotiated. Every school's system of insurance is different, and your school's insurance status will help you develop an effective training program.

Student programmers should learn that when they are discussing the performer and venue requirements for a potential booking, they should also discuss both their school's insurance status and the artist's/agency's insurance status. For example, many schools require vendors to carry insurance for higher risk events and that they provide a certificate of insurance to the school naming the school as an "additional insured" for the event.

To avoid getting caught unprepared, student programmers and their advisor should brainstorm "what if" scenarios when planning activities and events to

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identify potential risks. In this kind of ongoing student programmer training, programmers should learn their school's protocol for handling crises and include information about emergency procedures. In addition, consider involving the appropriate campus personnel in these event planning meetings. Discuss risk issues with those specialists on campus who are professionally trained in health services, law enforcement/security and counseling, for example. If these specialists are involved in your event planning meetings, it can be very convenient to request special staffing, such as nurses or security guards, during these meetings. Keep in

mind it is better to pay additional costs for these services, if your campus charges back these costs, than to risk an expensive settlement to avoid a lawsuit.

Effective risk management planning also dictates that your programming board should establish a chain of command for its event staff in the case of an emergency. Determine ahead of time who is to stay in charge, who is to call the paramedics and who is to call the police, for example. Finally, establish a formal post-event evaluation process for your programming board, whether or not anything goes wrong. A significant benefit of this evaluation process is better planning for future events.

## Approximately Three to Four Weeks Before the Event

As your event draws nearer, there are a number of other items you must arrange, order or reserve.

- Confirm scheduling of needed labor for the day of the event—Potential labor needs include a light/sound technician, set-up crew, ushers, ticket sellers, stage hands, and security personnel, for example. Make sure you have budgeted for any paid positions and be sure to involve the campus police in any training sessions for student volunteer security personnel. Refer to the Budget Request/Event Proposal Form discussed in Chapter Two. Any paid labor that was included in your estimated event costs should be itemized on this form.
- Confirm all sound, lighting, staging and equipment arrangements with the technical director or facilities manager—In addition, confirm all committees or crews, volunteers and paid personnel. Double check the sound and light check times, as well as the load-in and load-out times.
- Arrange for hospitality, concessions and any related tie-in sales—Confirm with the agency any set-up needs the artist may have if they will be selling merchandise before, during or after the performance. Confirm commitments with any on- or off-campus catering services. Inquire about any meal preferences the artist may have.
- Arrange for campus permits, artist accommodations, and transportation and travel/flight arrangements—Confirm all arrangements and provide the agency/artist with detailed directions to the school or point of first contact. Arrange for any special parking permits or campus IDs.
- Order or buy tickets, decorations, raffles and prizes—It may take some time to arrange for all of these items. It's best to allow as much extra time as possible to receive these items when ordering from catalogs. Be sure to check with your advisor before advertising, planning or ordering any such items. Also, be aware that your school or state may have regulations prohibiting raffles, door prizes or giveaways.
- Audience evaluation—Establish a method for evaluating your audience's reaction to the event. Create, design and gain approval at this time for the evaluation form you intend to use. A sample form is shown in Example 12.1 in Chapter 12.

## About One Week Before the Event

A few days before the event, review your entire checklist for any items you may have missed. Also, it is common practice for the agent or artist to call to “advance” the show. If you haven't been contacted by the agent or artist three days before the show, call the agent to double check all pertinent details. At this time, you will give them specific information, such as directions to campus, name and location of hotel, start time of the show, load-in time, and sound and light check times. At this time, also give the agent or artist contact names and numbers (both in the office and out) that the artist should use if they need to contact you the night before, or the day of, the show. You should inquire about the expected arrival time and method (by airplane, car, etc.), as well as when they prefer to have their meal. Cover any aspects not addressed by the contract that could potentially affect the artist's performance. At this point, you will also need to check the status of your request for payment for the artist(s).

Go to the venue and take several minutes to observe the overall condition, cleanliness and seating arrangements. Have all necessary repair work or equipment purchases been made? Check for any potential problems as you go over the technical rider one more time.

## One Day Before the Event

Reread the technical rider. Check that all lighting and sound equipment is in working order. Is all required equipment on hand and ready for use? If there is not an intercom system, arrange for a volunteer to serve as a house to backstage liaison, if needed.

Make sure that the performance area, audience/seating area and dressing rooms are clean and ready for the event/performance. Make sure that drinking glasses, chairs, towels, soap, well lighted mirrors, clothes racks and hangers, waste baskets, running water and toilets are available and ready for use. Confirm that there will be adequate security for the artist's equipment if it will be left unattended for a period of time. At this point, confirm that you have any necessary keys. Confirm that all crews and crew leaders are prepared for the event and also confirm that payment for the artist(s) is being processed as expected.

## The Day of the Event

On the day of the event, Kane recommends having the following items on hand to keep your program on track:

- your schedule for the day
- a master list of all phone numbers, purchase order numbers and contact information

- a “toolbox” filled with extra supplies like scissors, tape, and markers
- extra petty cash for emergencies (your advisor will best be able to recommend the amount of emergency cash your board should have on hand).

In addition, someone will need to be designated to manage the cash box if tickets are being sold. Someone will also need to pick up the check for the artist’s fee. It is customary for payment to be made at the completion of the event or performance.

## After the Event—Time for Follow-up

After you produce the event, the program board should schedule a regular and recurring time for event evaluation as a group. This part of the program planning process is most often overlooked when time is tight, but this is the best time to create a “for next time” list. This list should be a part of the evaluation the board completes and places in the file for this event. (For a complete description of the event evaluation process, see Chapter 12.)

In addition to a program evaluation, you will want to include a budget evaluation and a review of the event file itself, making sure copies of all necessary documentation are included for next year’s planning. Last, but not least, do not forget to thank all of your volunteers, and include an evaluation of the role they played as part of your total event evaluation process.

Contact the agent to give your follow-up report to the agency. In addition, submit an NACA Artist Performance Report for publication on the NACA Web site. Visit [www.naca.org/NACA/Schools/ArtistPerformanceReports/](http://www.naca.org/NACA/Schools/ArtistPerformanceReports/).

## Delivering the Goods

Your program planning process is where your programming board “delivers the goods” it promised in signing the performance contract and riders. Your success in producing a first-rate program will largely be determined by how carefully you negotiated the deal and reviewed the rider requirements with the artist or agency prior to signing the contract. Nevertheless, some difficulties are bound to arise in the production of almost any program. How you handle these difficulties will determine whether or not your program suffers in the end. The same principles apply to planning the logistics as in negotiating the contract: quickly address and communicate any potential problems or issues that might affect performance quality with both your school’s staff and with the artist or agency. Often, you can reach a compromise solution.

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