



# Event Planning Tips

*The following information has been compiled for the benefit of other SEE-Change members, from a training session by Maine Street Marketing that was attended by SEE-Change staff.*

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## Events as Opportunities

In today's digital age we can connect with anyone, any time, anywhere through smart phones, laptops, desktops, television screens, I-tablets and even games consoles. Yet nothing is more powerful than people meeting each other to share an experience. That is why events remain excellent ways to reach out and connect with your audiences.

In recent years the types of events you can hold have mushroomed and choices include:

- Award ceremonies.
- Career fairs.
- Commemorative occasions.
- Conferences, seminars, meetings.
- Cultural performances.
- Demonstrations.
- Open days.
- Product launches.
- Site visits.
- Sporting fixtures.
- Trade shows.
- Online events like web conferences, webinars, on-line forums, polls and fundraising, even tweet-ups and Facebook campaigns.

Even the simplest event can be time and labour intensive, but adopting a three-step process will streamline your efforts and create successful event:

- Step#1: Set the essentials.
- Step#2: Promote the event.
- Step#3: Deliver and follow-up the event.

## Step #1: Set the Essentials

### Objectives

- Ensure your event has a clear, unambiguous purpose.
  - Is it to launch a new campaign, raise money or celebrate an achievement? Or is there some other reason?
  - Having event objectives guides your approach to event planning and influences how you design, carry out and promote your activity. Of course you can hold an event for more than one reason but complications arise the more reasons you have.
- Set specific objectives for your event from the outset and make sure they pass the *SMART* test.
  - **S**pecific and express precisely the reasons you are holding an event.
  - **M**easurable and include metrics, numbers and other ways you can judge success.
  - **A**greed by your Board, CEO and key staff because their time, energy and money are on the line.
  - **R**ealistic to avoid being overambitious or too timid.
  - **T**imely so you know when things happen.

### Date

- Set the date early, noting to:
  - Allow enough time to plan, prepare and promote your event. Major events can take a year or more to plan and even routine affairs often take weeks to set up.
  - Avoid clashes with the dates of similar or popular events that could compete for the same audiences or holiday periods when people may be unavailable.
  - Leverage off days that already attract public sentiment such as St Valentines Day.

## **Time of Day**

- Set the time of day for the event, noting:
  - The time of day must suit the audience. For example a breakfast meeting may attract business people but might not appeal to those with young children.
  - Older people may shun an evening affair because they dislike driving at night.
  - Professional people could have trouble going to something during office hours.
  - TV crews and reporters generally cannot make early morning or evening events so timing an event that increases their attendance is important.
  - Sometimes when a politician or celebrity can attend will influence the timing.

## **Venue**

- Set the venue, noting:
  - The venue is the first point of impression for your audience.
  - Where you hold your event will speak volumes about your organization.
  - Of course the easiest choice is to hold it at your own location. Staff and volunteers are familiar with the surroundings and costs will be lower.
  - You may choose to decorate or theme your site or leave things as they are so people can see how workplace runs.
  - There may be times when your event must off-site. For example your building is too small for the numbers expected or you do not want to disrupt normal operations.
  - An early and strategic question to ask when selecting an external location is whether it fits within your organisation's culture, ideals and budget. A party at an up market hotel may be prestigious but might send the wrong message about what you do and how much money you have. On the other hand people will not want to attend an event at a shabby location.
- Start by making a list of venues in your area that could be suitable and then arrange to inspect each In turn looking into the following issues:
  - Is the venue right for your Image and can you afford it?
  - Will it suit the theme you have chosen and can it handle the crowd you expect?
  - Are the layouts flexible? For example does it offer theatre style seating, seminar settings or different dining arrangements.
  - Can people get to the venue easily? Can they park?
  - Is it well signposted and lit at night?
  - Is it accessible for people with disabilities?
  - How does the catering? You, the venue or a contractor?
  - Is serving alcohol controlled especially if minors attend?
  - What are the guidelines for permits, insurances, deposits, confirming final numbers, paying staff if the event runs overtime?
  - When can you set up the venue and when do you need to get out?
  - Can you have entertainment?
  - Is there enough security?
  - Is there environmentally responsible waste disposal and recycling arrangements?
  - Are there limits on promoting the event or inviting the media?
  - Can you record the event?
  - When do I pay the bill?

## **Themes**

- Identify what your event will look like – get creative!
  - The format of your event plays a major role in how successful it is. Especially today when not-for-profits are continually searching for new ways to attract attention.
- Sources for fresh ideas for your event can come from:
  - Researching the past to see how familiar formats can be improved.
  - Asking staff, volunteers, followers, friends and the public for ideas.

- Crowd sourcing ideas through social media.
- Googling to check out best practices, case studies or how other industries or similar organisations conduct events? Or to see what works elsewhere?
- Asking a professional event organizer for suggestions.
- Picking a theme that reflects something in the news.
- Asking the media about successful events they have previously reported.

### **Collaboration**

- There are benefits in merging your activity with a community festival or other large or well established undertaking. You get to share responsibilities, costs and effort. And you work with others to build an audience.
- Collaboration also means you have less control over the proceedings, timings, finances and even the outcome.
- If you plan to work with others for an event:
  - Ensure they share similar cultural values, have nothing in their past that will prejudice your issue and their messages complement and do not conflict with yours.
  - As importantly there must be a clear understanding of roles, responsibilities, timings and financial arrangements from the start.

### **Teamwork**

- A common approach is to set up a coordinating committee to supervise promotions, finance, sponsorship and other important work. This spreads the workload and ensures key areas or people in your organisation are committed to the event.
- The committee membership must include a chairperson who can guide the group in laying down responsibilities, setting priorities, developing timetables and watching spending. This body is the engine-room of the event so you want passionate enthusiasts who understand the importance of the event and care about your organization.
- As a rule, most organisations underestimate the workload involved in staging and following up an event. Strategies to avoid overwork include:
  - Ensuring the event is within the capacity of your organisation.
  - Recruiting as many people as you can to effectively manage and help out.
  - Asking sister organisations to help in exchange for your support at their events.
  - Identifying people for post event tasks, sparing them the detailed work in the lead-up to the event.
- Keeping everyone motivated and on track can be a real challenge. This calls for regular updates, coordination meetings, keeping contact lists of key people and even sharing important documents through Google Documents, Evernote, Dropbox or other on-line platforms.

### **Budget**

- Setting and sticking to a budget is a key part during planning and implementation, and one to be continually developed, managed and checked.
- You will need a source of funds to cover early administrative and marketing expenses and pay any deposits. Then as the event gets underway ticket sales, admission fees, merchandise sales, subscriptions and donations can help meet costs.
- It is always wise to shop around for the best deals. Getting quotes from several suppliers will ensure your organisation is getting the best value for money. Other ways to contain costs are:
  - Getting help from local college or university students looking for work experience.
  - Recruiting in-kind sponsors to supply needed goods or services to the event.
  - Contracting specialists for managing celebrities, attracting sponsorships, stage-managing entertainment and other complex tasks.

## **Management Support**

- A wise event planner always tells the Board, CEO and senior management how an event is progressing. You can update them informally but at certain times it is wise to specifically seek management direction or approval:
  - For the date, time, place, theme, budget and staffing measures you need.
  - When major milestones are reached.
  - When significant opportunities or problems arise.
  - To report results after the event.

## **Timetable**

- Most events occur on a specific date or period so it is important to set up a timeline for your event. A timetable helps you see the trees as well as the forest involved in an event, and ensures you make that all important event day.
- Each event is different but an indicative timeline for a small sized event will be detailed. It might even look like this - where E represents the day of the event:
  - E minus 12+ weeks: Set the date, time, place, budget, invite celebrities, seek sponsors, recruit the event team, call for volunteers and brief management.
  - E minus 10+ weeks: Order In merchandise, settle venues, book catering, printing and do early risk management planning.
  - E minus 8+ weeks: Begin promotions, send out Invitations and brief management.
  - E minus 6+ weeks: Marketing intensifies.
  - E minus 4+ weeks: Increase all marketing and continue detailed coordination.
  - E-Day: The day of the event.
  - E to 4+ four weeks: Settle bills, follow-up requests for information, enlist new members, brief management on the outcomes, send out thank you's, debrief your team and compile a post activity report to guide next year's planners.

## **Step #2: Promotion**

### **When to Start**

- Begin marketing as soon as you have set the date, time and place of your event.
- From Day One until the event wraps up, stream relevant communications to your audiences to motivate staff/volunteers, encourage people to attend, attract sponsors and engage media Interest.

### **Blend Activity**

- An event involves a mini-marketing campaign. You need to decide who you want to attend (audiences) and then select the best mix of information that will persuade them to come (messages). Delivering those message to these audiences needs an integrated marketing that often blends:
  - Advertising.
  - Collateral like signage, fliers, posters, brochures etc.
  - Direct marketing through mail, telemarketing and email.
  - Media relations.
  - Social media and web based promotions.
  - Sponsorships.
  - Word of mouth marketing
  - Working with other organizations.

## Step #3: Deliver and Follow-Up

### Manage Risks

- It is prudent to have arrangements in place to handle likely or unforeseen issues that could derail your efforts, such as:
  - Bad weather.
  - Critical tasks that come up at the last minute.
  - Emergencies such as fires, security concerns, food poisoning etc.
  - Entertainers or celebrities who fail to show.
  - Equipment or technical problems.
  - Illness or absence of key members of the event team.
  - Late changes to the program.
  - Media, social media or public criticism.
  - The impact of international or national calamities.
  - Unforeseen expenses.

### Paperwork

- An event is over only when everything is cleaned, packed away and all post event administration is done. This involves answering visitor and media questions, processing enquiries and membership applications, sending thank you letters, recognising the efforts of staff and volunteers, paying bills, receiving feedback and recording then archiving the major lessons learned.

### Evaluation

- Now is the time when you evaluate the results against the original event objectives.
  - Did you get the expected numbers?
  - Did the right people come?
  - What was the media coverage?
  - Were financial goals met?
  - How many enquiries did you get?
  - How many new clients, volunteers or supporters were recruited?

*The secret of successful events: creativity, teamwork and careful planning*

### ALPHABETICAL EVENTS CHECKLIST

| <b>Function</b> | <b>Task</b>  | <b>Responsible person</b> | <b>Budget</b> | <b>Deadline</b> |
|-----------------|--|---------------------------|---------------|-----------------|
| Advertising     | <ul style="list-style-type: none"> <li>• Prepare advertising material.</li> <li>• Get advertising material approved for release.</li> <li>• Book advertising space in magazines, newspapers, radio, TV, on-line and/or outdoor mediums.</li> <li>• Brief the chief executive officer, board or management committee on the advertising schedule.</li> <li>• In the event of unforeseen circumstances, have the capacity to adjust the advertising schedule.</li> </ul> |                           |               |                 |
| Approvals       | <ul style="list-style-type: none"> <li>• Obtain approval for the theme, time, place, venue and other key details.</li> <li>• Ensure partner organisations approve key event details.</li> <li>• Apply for and receive city, police and other public safety related permits as necessary.</li> <li>• Ensure financial delegations and other authorisations are in place.</li> <li>• Ensure merchandise licensing and similar arrangements are obtained.</li> </ul>      |                           |               |                 |

| <b>Function</b>     | <b>Task</b>   | <b>Responsible person</b> | <b>Budget</b> | <b>Deadline</b> |
|---------------------|---|---------------------------|---------------|-----------------|
| Budget              | <ul style="list-style-type: none"> <li>• Complete a budget estimate to ensure the event is financially viable.</li> <li>• Before committing to high cost arrangements, insist on competitive quotes are obtained from suppliers.</li> <li>• Develop clear and negotiated contracts with major suppliers.</li> <li>• Decide on additional funding, admission fees, donations and sponsorships.</li> <li>• Obtain management approval for the budget.</li> <li>• Ensure banking, financial delegations and other authorisations are in place.</li> <li>• Establish arrangements for collecting and banking cash at the event.</li> <li>• Reconcile the budget after the event.</li> </ul>   |                           |               |                 |
| Catering            | <ul style="list-style-type: none"> <li>• Identify the style of catering that will suit the theme of your event and your budget (buffet, seated dinner, pasta bar, salad bar, BBQ, etc).</li> <li>• Establish a policy on serving alcohol. If alcohol is to be served determine if there will be an open bar, a cash bar or drink vouchers issued to guests.</li> <li>• Receive quotes for catering and associated services then select a caterer and brief them on-site.</li> <li>• Keep contact with suppliers in the lead-up to the event.</li> <li>• Choose menus and advise planned numbers attending.</li> <li>• Identify special diet needs of guests.</li> <li>• Print menus, place cards etc</li> <li>• Finalise catering numbers by an agreed time before the event.</li> <li>• Coordinate serving times with entertainment, speeches etc.</li> <li>• Arrange seating plans including VIP arrangements.</li> <li>• Brief the master of ceremonies on serving details.</li> <li>• Have the capacity to cater for unexpected guests.</li> <li>• Make necessary arrangements with convenience food and soft drink vendors.</li> </ul> |                           |               |                 |
| Celebrities         | <ul style="list-style-type: none"> <li>• Identify celebrities that could take part in the event and confirm their suitability through research.</li> <li>• Approach agents/managers or celebrities directly.</li> <li>• Agree celebrity involvement, associated costs and other contractual arrangements.</li> <li>• Brief celebrities on their participation and provide speaking notes and media talking points.</li> <li>• Arrange appropriate media cover.</li> <li>• Host celebrities at the event including accommodation and travel.</li> <li>• Thank celebrities and pay accounts after the event.</li> </ul>   |                           |               |                 |
| Consultation        | <ul style="list-style-type: none"> <li>• Consult and brief other areas of your organisation about the event, community leaders and groups where necessary.</li> </ul>   |                           |               |                 |
| Coordination Centre | <ul style="list-style-type: none"> <li>• At large events establish an event coordination centre to manage accidents, on-site communications, public inquiries, deliveries, missing children, lost property and staffing rosters.</li> </ul>   |                           |               |                 |
| Crowds              | <ul style="list-style-type: none"> <li>• Develop a crowd control plan for large events in conjunction with venue operators, security and police if appropriate.</li> <li>• Make arrangements for lost children.</li> <li>• Arrange access for disabled visitors.</li> </ul>   |                           |               |                 |

| <b>Function</b> | <b>Task</b>   | <b>Responsible person</b> | <b>Budget</b> | <b>Deadline</b> |
|-----------------|---|---------------------------|---------------|-----------------|
|                 | <ul style="list-style-type: none"> <li>• Ensure parking is available, secure and adequate.</li> <li>• Provide event signage and clearly identify and secure any "no go" areas.</li> <li>• Have a lost property section.</li> <li>• Liaise with local transport officials to cater for additional numbers, road closures etc.</li> </ul>   |                           |               |                 |
| Displays        | <ul style="list-style-type: none"> <li>• Design displays that complement the event theme.</li> <li>• Design and professionally present display booths etc.</li> <li>• Draft a site/floor plan showing the layout of displays and demonstrations.</li> <li>• Construct displays so they can be used after the event.</li> <li>• Aim to get the public Involved in displays and demonstrations.</li> <li>• Always rehearse demonstrations and coordinate them carefully with other key program timings.</li> <li>• Ensure displays and demonstrations are safe.</li> <li>• Locate displays for easy public access.</li> <li>• Establish a roster system for staff In display areas.</li> <li>• Brief staff working In display booths and at demonstrations.</li> <li>• Develop, produce and distribute Information hand-outs.</li> <li>• Encourage people to leave their contact details and ask permission to send follow-up information.</li> </ul> |                           |               |                 |
| Entertainment   | <ul style="list-style-type: none"> <li>• Identify entertainment that suits the event theme.</li> <li>• Contact, brief and book entertainers who are suitable for the audience.</li> <li>• Discover all upfront and ancillary costs (meals, hire of audio-visual equipment, overtime, etc).</li> <li>• Ensure appropriate equipment is available.</li> <li>• Arrange on-site rehearsals.</li> <li>• Brief entertainers on last minute program changes.</li> </ul>  |                           |               |                 |
| Environment     | <ul style="list-style-type: none"> <li>• Ensure the event conforms to environmental, public health, hygiene and other regulations.</li> <li>• Ensure safe handling of chemicals, fireworks etc.</li> <li>• Arrange adequate garbage collection and recycling arrangements for outdoor events.</li> </ul>  |                           |               |                 |
| Evaluation      | <ul style="list-style-type: none"> <li>• Set and monitor key performance indicators (KPI) that show event objectives have been achieved. These could include:</li> <li>• Visitor numbers</li> <li>• gate takings</li> <li>• sales figures</li> <li>• donations</li> <li>• membership Inquiries</li> <li>• requests for information</li> <li>• media coverage</li> </ul>   |                           |               |                 |
| Follow-up       | <ul style="list-style-type: none"> <li>• Debrief the team and advise senior management, staff, partners, sponsors and media of outcomes.</li> <li>• Reconcile and audit finances.</li> <li>• Complete a post activity report.</li> <li>• Thank staff, key people, celebrities and others.</li> <li>• Archive files.</li> </ul>  |                           |               |                 |
| Guests          | <ul style="list-style-type: none"> <li>• Identify and compile guest lists.</li> <li>• Establish and manage a database of guests.</li> </ul>   |                           |               |                 |



| <b>Function</b>   | <b>Task</b>  | <b>Responsible person</b> | <b>Budget</b> | <b>Deadline</b> |
|-------------------|--|---------------------------|---------------|-----------------|
|                   | <ul style="list-style-type: none"> <li>• Send out Invitations.</li> <li>• Collect RSVPs through websites, email, over the phone or other arrangements.</li> <li>• Compile seating plans and schedule VIPs to meet senior managements, visit display booths and take part in demonstrations.</li> <li>• Brief and confirm VIP arrangements.</li> <li>• Ensure adequate and secure parking.</li> <li>• Welcome and direct guests on arrival.</li> <li>• Follow-up and thank VIPs.</li> </ul>   |                           |               |                 |
| Issues management | <ul style="list-style-type: none"> <li>• If your event could attract controversy, develop an issues management plan.</li> <li>• Ensure your plan identifies topics that could attract media, public or government criticism, provides talking points, identifies primary and alternate spokespersons and provides for rapid communications to staff and key supporters if controversy strikes.</li> <li>• Have senior management approve the plan and if appropriate rehearse it before the event.</li> <li>• Update the plan as new information arrives.</li> </ul>   |                           |               |                 |
| Legal             | <ul style="list-style-type: none"> <li>• Arrange insurances, licences, approvals and permits.</li> <li>• Identify and manage potential public safety and commercial risks.</li> <li>• Brief in-house or other legal advisers on key event details and contracts.</li> </ul>  |                           |               |                 |
| Media             | <ul style="list-style-type: none"> <li>• Identify event stories.</li> <li>• Develop a database of mainstream media outlets to approach.</li> <li>• Identify social media to carry your information (e-zines, websites, blogs and podcasts etc).</li> <li>• Develop media releases, alerts, backgrounders, media kits, bios, fact sheets, frequently asked questions etc and have management approve them before dispatch.</li> <li>• Develop a distribution schedule for media products.</li> <li>• Develop and progressively update the media room on your website.</li> <li>• Pitch the event to journalists, producers, editors, bloggers and webmasters.</li> <li>• Identify visual opportunities to encourage TV crews and photographers to attend.</li> <li>• Invite media to rehearsals, briefings, previews, etc to generate pre-event coverage.</li> <li>• Escort journalists, TV crews and photographers when they attend the event.</li> <li>• Brief them on highlights so they can plan vantage points.</li> <li>• Identify, media-train and brief an event spokesperson and an alternate spokesperson.</li> <li>• Follow-up all media inquires promptly.</li> <li>• After the event thank journalists who provide significant reporting.</li> </ul> |                           |               |                 |
| Planning team     | <ul style="list-style-type: none"> <li>• Identify staff or volunteers to assist with the event.</li> <li>• Provide them with written responsibilities including coordination arrangements.</li> <li>• Schedule planning meetings.</li> </ul>   |                           |               |                 |

| <b>Function</b>       | <b>Task</b>  | <b>Responsible person</b> | <b>Budget</b> | <b>Deadline</b> |
|-----------------------|--|---------------------------|---------------|-----------------|
|                       | <ul style="list-style-type: none"> <li>• Monitor their performance.</li> <li>• Mentor, advise, guide and direct as necessary.</li> <li>• Acknowledge and reward their good work.</li> </ul>  |                           |               |                 |
| Printing              | <ul style="list-style-type: none"> <li>• Determine the need for brochures, posters, fliers, newsletters, maps, programs, signage etc.</li> <li>• Write text and arrange Images for all products.</li> <li>• Ensure printers know the technical specifications for reproducing your logos etc.</li> <li>• Get quotes for printing and associated services.</li> <li>• Select printers and other suppliers and keep contact with them in the lead-up to the event.</li> <li>• Check proofs and layouts for accuracy, quality etc.</li> <li>• Minimize editorial changes to text to contain costs.</li> <li>• Arrange storage particularly for large volume print runs.</li> <li>• Distribute printed material well before and at the event.</li> </ul> |                           |               |                 |
| Public Address System | <ul style="list-style-type: none"> <li>• Establish a public address (PA) system for large events and ensure staff know its location.</li> <li>• Develop a script for the announcer and brief him or her on the program.</li> <li>• Advise the announcer on who is authorised to provide progressive updates, details of missing children, lost property etc.</li> <li>• Instruct the announcer to identify key events, sponsors, VIPs, celebrities etc.</li> </ul>   |                           |               |                 |
| Risk Management       | <ul style="list-style-type: none"> <li>• Develop a risk management plan for potential threats.</li> <li>• At large events brief staff on procedures for crowd control, responding to accidents, access for emergency vehicles, first aid, electrical, fire, hygiene and other Issues. Make sure they know about security of stores, equipment and information, special Instructions for fireworks etc.</li> </ul>  |                           |               |                 |
| Signage               | <ul style="list-style-type: none"> <li>• Ensure the event is adequately signed with easy to understand, water proofed and professional looking signage.</li> <li>• Provide enough Information for people to understand what they are seeing at display booths and demonstrations.</li> <li>• Ensure signs avoid complex text or technical data.</li> </ul>   |                           |               |                 |
| Volunteers            | <ul style="list-style-type: none"> <li>• Assign specific tasks to staff and volunteers, brief them on their responsibilities and nominate completion dates for work.</li> <li>• Record contact details for people assisting with the event.</li> <li>• Provide checklists for complex events.</li> <li>• For large scale events establish a dress code.</li> <li>• Brief staff on key timings, emergency procedures, rosters and rest breaks, collecting information from guests etc.</li> <li>• Where the event covers an extended period, provide a daily briefing on what is happening.</li> <li>• Have an efficient way to quickly communicate with staff dispersed over large venues such as golf courses.</li> </ul>                           |                           |               |                 |
| Themes                | <ul style="list-style-type: none"> <li>• Establish a theme to complement event objectives and one that appeals to people likely to attend.</li> <li>• Get senior management approval before detailed planning begins.</li> <li>• Ensure decorations, entertainment, promotions, catering etc support the theme.</li> </ul>   |                           |               |                 |

| <b>Function</b> | <b>Task</b>   | <b>Responsible person</b> | <b>Budget</b> | <b>Deadline</b> |
|-----------------|---|---------------------------|---------------|-----------------|
| Utilities       | <ul style="list-style-type: none"> <li>• Provide appropriate parking, lighting, power, restroom, seating and other arrangements.</li> </ul>   |                           |               |                 |
| Venue           | <ul style="list-style-type: none"> <li>• Investigate alternate locations.</li> <li>• Inspect venues before committing and find out all direct and hidden costs and insurance requirements.</li> <li>• Select the venue that will accommodate your event, is easy to find and access, secure and within budget.</li> <li>• Ensure appropriate parking, lighting, audio visual, security, signage and other capacity.</li> <li>• Be aware of the venue cancellation policy if your event does not proceed.</li> <li>• Check policies on displaying your own and sponsors' promotional materials on-site.</li> <li>• Check if you will be limited to use certain suppliers, food vendors etc.</li> <li>• Identify the need for permits if using public spaces.</li> <li>• For outdoor venues, identify indoor alternatives in the event of bad weather.</li> <li>• When booking the venue, factor the time needed for set-up and dismantling the event.</li> <li>• Develop a site plan before moving in stores and equipment.</li> <li>• Coordinate the arrival and departure of stores and equipment with loading dock, security and other staff.</li> <li>• Identify and staff entry points into the event, registration desks etc.</li> </ul> |                           |               |                 |
| Wet weather     | <ul style="list-style-type: none"> <li>• Identify arrangements including alternate venues, abbreviated programs and notifying staff, senior management, VIPs and the media</li> </ul>   |                           |               |                 |