

# **ATELIER FOR FESTIVAL MANAGERS**

## **TOOLKIT**

### **SUSTAINABILITY:**

#### **Sustainable Business Practices**

**Compiled by Glyn Roberts, Gaik Cheng and Samantha Nampuntha**



## About our Toolkits Series

Since September 2019, The Festival Academy and its community have been developing the series of toolkits of which this volume is part within the framework of the [Act for Global Change: A Global Conversation from the Arts to the World \(ACT\)](#) project supported by [Creative Europe \(Cooperation Projects 2019-21\)](#).

The aim of this series is to **provide festival experts and sector practitioners with information on current trends and inspiring examples** from the industry, as well as relevant contextual information on their specific issues. With this, the toolkits are developed with the intention of enabling readers to get insights and inspiration for current and future challenges in their own practice. They include **knowledge gathered in the series of activities (Ateliers, keynotes and working sessions) promoted by The Festival Academy** since September 2019, as well as information from a variety of existing research resources and sources produced and brought by our community of Alumni, mentors, experts, speakers and festival practitioners.

The series covers **six topics**, within the scope of their relevance to festival and cultural practitioners:

1. Digital Technology
2. Programming and Curating a Festival
3. Caring for Artists and Technical Crew
4. Sustainable Business Practices
5. Audience Development and Retention
6. Festivals, Climate Change and Environmental Sustainability

The content of each topic-based toolkit includes theoretical knowledge and relevant case studies that can be used as reference and as a basis for the practice of festival making. For such, each toolkit is divided into **two parts**: the first one compiling the **pertinent theoretical background** on its specific topic and the respective links and sources for additional information; and the second part gathering **best practices and examples** related to the specific Toolkit theme which can serve as inspirational guides for festival-makers worldwide.

These Toolkits are not meant to provide ‘one-size-fits-all’ templates as conditions in which festivals take place vary substantially across the globe depending on political and social contexts, access to resources, and a range of other factors. We have attempted to glean case studies from as many different contexts as possible. It is up to readers and festival managers to interpret and apply the principles contained in the Toolkits to their respective conditions.

Readers are welcome to **navigate these toolkits by clicking through their interactive summaries** and being redirected thus to the parts that most interest them.

These toolkits were developed by teams of alumni with The Festival Academy staff and Atelier facilitator also contributing. The alumni team comprised:

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Please refer to each toolkit for the names of its specific authors.

Anaiz Dessartre Mendonça, Inge Ceustermans and Mike van Graan of The Festival Academy contributed too.

The toolkits are **open-sourced, continuously developed tools**. Therefore, festival and cultural practitioners from all backgrounds and levels of experience are **invited to expand these materials** by adding their own contributions, building on the gathering of knowledge and insights shared with the whole festival-making community worldwide.



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# 1 Introduction

## About this toolkit

The toolkit is based on information gathered from a series of Ateliers and activities promoted by The Festival Academy, existing resources by academics and experts, and knowledge produced by our network of alumni, mentors, experts & festival practitioners. This toolkit is a constant work in progress, which is why it is intended that to be developed and updated over time as it is built upon the experience and insights generated through future activities.

The aim of this toolkit is to provide festival experts and sector practitioners access to information on current trends related with sustainable business practices for festivals, as well as relevant contextual information on the topic. This toolkit should enable readers to get insights and inspiration for addressing challenges related with sustainability that take part of each festival.

The toolkit provides the reader with a set of issues and relevant examples that can guide future Festivals. The first part compiles relevant information about sustainability definitions and tools for implementing sustainable practices in festivals. The second part gathers best practices and examples which can serve as inspirational guides for festival-makers worldwide. It provides insights into what questions should we keep in mind before, during, and after our festivals regarding sustainability.

## Why this toolkit

This toolkit is for anyone who is running a festival or thinking of creating a festival and has questions about how to maintain funding, legacy and audience engagement in a manageable way.

Follow festival makers Samantha, Gaik and Glyn as they walk you through their top tips and show you the best tools in their kit to ensure long term success for your festival and your audiences.

## How to provide feedback, amendments, and additions

We are always looking for ways to improve and are open to presenting new ideas. Please email: [info@festivalacademy.eu](mailto:info@festivalacademy.eu) for feedback, amendments, and contributions especially if you want to share an unusual approach to caring about artists and technical crews or provide your festival's approach as a case study.



## 2 What is meant by “sustainability”?

### Definitions

Oxford Dictionary defines it as the ability to be maintained at a certain rate or level. When we talk about sustainability of festivals, we are talking about how a festival can ensure they survive or stay relevant in the changing climate. Sustainability is a complicated concept that needs to look at every angle of the festival. It is a look at the health, wealth (of money, people, structures, community etc), impact, importance and longevity of the festival.<sup>1</sup> It is a process that festival managers must carry out throughout the life of a festival, looking at the entire product and evaluating if there is growth. It is important to note that growth is growth, whether it is small, only in one department, only in a few aspects or only something that is clear to you and your crew.

### Definition of ‘sustainable development’

The most accepted definition comes from the Brundtland Commission formerly known as the UN Commission on Environment and Development, they define Sustainable Development as “development that meets the needs of the present without compromising the ability of future generations to meet their own needs”<sup>2</sup>.

The concept originally was developed after the 1987 UN report of the World Commission on Environment and Development titled “Our Common Future”, the document named three pillars of sustainable development: economic, environmental, and social—also known informally as profits, planet, and people<sup>3</sup>. That was however, a very long time ago and people started to realise a building stands better with four pillars. At the beginning of this century, “voices of different parts of society, from international institutions to academia, began to question the validity of the current definition of sustainable development”<sup>4</sup>.

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<sup>1</sup> *Apud* Oxford College of Procurement & Supply, accessed 10 November 2021, <https://www.oxfordcollegeofprocurementandsupply.com/how-sustainable-is-sustainability/#:~:text=The%20current%20definition%20of%20sustainability,term%20depletion%20of%20natural%20resources%E2%80%9C>.

<sup>2</sup> “Sustainable Development,” UNESCO, August 20, 2015, <https://en.unesco.org/themes/education-sustainable-development/what-is-esd>.

<sup>3</sup> United Nations World Commission on Environment and Development, “Towards Sustainable Development,” in *Our Common Future*, ed. United Nations World Commission on Environment and Development, 1987.

<sup>4</sup> “Culture, the Fourth Pillar of Sustainability,” Culture, the fourth pillar of sustainability | Culture 21, accessed November 4, 2021, <https://www.agenda21culture.net/documents/culture-the-fourth-pillar-of-sustainability>.



## They wanted the addition of a fourth pillar: culture<sup>5</sup>!

When looking at the sustainable development of festivals all four pillars need to be strong in order for a festival to continue its lifespan. Here are a few questions you can ask yourself when trying to see how sustainable developed your festival is:

- Are you meeting the needs of the people and the planet (environment)?
- Are you giving as much as you are taking? (from natural resources, audience, venue, sponsors/partners, stakeholders, community, etc)
- What will your festival do for future generations?
- Has culture been represented appropriately?
- What are you doing to remove unwanted/unneeded norms in society?

Evaluating your festival on a yearly basis helps to ensure you are constantly improving or staying relevant hence ensuring your festival is sustainable.

## Culture as the fourth pillar of sustainability and its relevance to festivals

Culture can be defined as “the characteristics and knowledge of a particular group of people, encompassing language, religion, cuisine, social habits, music and arts”<sup>6</sup> or “the arts and other manifestations of human intellectual achievement regarded collectively”<sup>7</sup>.

In the fight to name culture as a fourth pillar, The Executive Bureau of United Cities and Local Government (UCLG) approved the Policy Statement “Culture is the Fourth Pillar of Sustainable Development” on 17 November 2010, in the framework of the World Summit of Local and Regional Leaders - 3rd World Congress of UCLG, held in Mexico City.<sup>8</sup> UNESCO have highly endorsed it as a pillar as well. A statement from UNESCO’s website states:

*In today’s interconnected world, culture’s power to transform societies is clear. Its diverse manifestations – from our cherished historic monuments and museums to traditional practices and contemporary art forms – enrich our everyday lives in countless ways. Heritage constitutes a source of identity and cohesion for communities disrupted by bewildering change and economic instability. Creativity contributes to building open, inclusive and pluralistic societies. Both heritage and creativity lay the foundations for vibrant, innovative and prosperous knowledge societies.*

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<sup>5</sup> “Culture, the Fourth Pillar of Sustainability,” Culture, the fourth pillar of sustainability | Culture 21, accessed November 4, 2021, <https://www.agenda21culture.net/documents/culture-the-fourth-pillar-of-sustainability>.

<sup>6</sup> Kim Ann Zimmermann, “What Is Culture?,” LiveScience (Purch, July 13, 2017), <https://www.livescience.com/21478-what-is-culture-definition-of-culture.html>.

<sup>7</sup> “Culture: Meaning & Definition for UK English,” Lexico Dictionaries | English (Lexico Dictionaries), accessed November 4, 2021, <https://www.lexico.com/definition/culture>.

<sup>8</sup> Kim Ann Zimmermann, “What Is Culture?,” LiveScience (Purch, July 13, 2017), <https://www.livescience.com/21478-what-is-culture-definition-of-culture.html>.



*UNESCO is convinced that no development can be sustainable without a strong culture component. Indeed only a human-centered approach to development based on mutual respect and open dialogue among cultures can lead to lasting, inclusive and equitable results. Yet until recently, culture has been missing from the development equation<sup>9</sup>.*

Festivals are one of the biggest promoters, enablers and gatekeepers of culture therefore have a strong part to play in international sustainable development. Festivals need to act as vector of change, promoting solutions to society's problems and not adding onto them.

UNESCO released a 2012 thematic piece called "Culture: a driver and enabler of sustainable development" that stated that data collected throughout a decade had shown that culture can be a strong driver for development with community-wide social, economic and environmental impacts. In a great victory for culture as fourth pillar UN finally accepted the truth and by January 2012, culture was included in 70% of the United Nations Development Assistance Frameworks.<sup>10</sup> A number of institutes that are formed around sustainable development all agree that work around culture needs to be added to any plan, programme, project to be able to be successful long time.

The [Center for International Relations and Sustainable Development \(CIRSD\)](#) best summaries the correlations between culture and society, economy and environment:

*Concerning relation between culture and society, culture is a critical means to determine how values, behaviors, and assumptions influence the inclusiveness, openness and cohesion of societies, as well as the improvement of people's rights, health, and quality of life. Culture creates the thread that keeps society together and gives people the tools to find their way into that society. Culture is important as a field of creation and for the maintenance of values of mutual trust, solidarity, respect of law, and democracy. These sets of values provide motivation for people to work, communicate, create, and respect others. This is the foundation for the development of society and individuals.*

*Besides different non-monetized benefits, there is also a strong connection between culture and economy as the pillars of sustainable development. As stated in the above mentioned UNESCOs thematic paper, '...of particular relevance is the cultural sector's contribution to the economy and poverty alleviation. Cultural heritage, cultural and creative industries, sustainable cultural tourism, and cultural infrastructure can serve as strategic tools for revenue generation, particularly in developing countries given their often-rich cultural heritage and substantial labour force.'*

*Finally, regarding the connection between culture and environment. cultural factors also influence lifestyles, individual behaviour, consumption patterns, values related to environmental*

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<sup>9</sup> UNESCO, "Protecting Our Heritage and Fostering Creativity," UNESCO, October 5, 2021, <https://en.unesco.org/themes/protecting-our-heritage-and-fostering-creativity>.

<sup>10</sup> UNESCO, "Culture: a driver and an enabler of sustainable development," UN System Task Team on the post-2015 UN development agenda, *Thematic Think Piece*, May 2012, [https://www.un.org/millenniumgoals/pdf/Think%20Pieces/2\\_culture.pdf](https://www.un.org/millenniumgoals/pdf/Think%20Pieces/2_culture.pdf).



*stewardship, and our interaction with the natural environment. Local and indigenous knowledge systems and environmental management practices provide valuable insight and tools for tackling ecological challenges, preventing biodiversity loss, reducing land degradation, and mitigating the effects of climate change<sup>11</sup>.*

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<sup>11</sup> Slobodan Cvejić, “Culture – the Fourth Pillar of Sustainable Development,” CIRSD, accessed November 4, 2021, <https://www.cirsd.org/en/see-views/culture-%E2%80%93-the-fourth-pillar-of-sustainable-development>.



### 3 Analysing conditions for sustainability

There are various tools that can help you pre-check the sustainability of your festival, this toolkit highlights three of the most effective and relevant ones.

#### PESTEL + C Analysis (External Factors)

PESTEL is an acronym for Political, Economical, Social, Technological, Environmental and Legal<sup>12</sup>. This is an analytical toolkit that looks at all the external factors that affect your project highlighting all the things that can both help and undermine your festival.

	Definition	Examples
Political	The government or public affairs of a country	<ul style="list-style-type: none"> <li>• Political support</li> <li>• War</li> <li>• Policies and incentives</li> <li>• Visas</li> </ul>
Economical	State of individual/area/country in terms of production and consumption of good and services and the supply of money	<ul style="list-style-type: none"> <li>• Buying/spending powers of festival attendees</li> <li>• Cost of suppliers</li> <li>• Access to affordable transport systems</li> </ul>
Social	Relating to society or its organization.	<ul style="list-style-type: none"> <li>• Trends</li> <li>• Shared morals</li> <li>• Beliefs</li> <li>• Population age demographics</li> </ul>
Technological	The application of scientific knowledge for practical purposes especially in industry.	<ul style="list-style-type: none"> <li>• Social media</li> <li>• Festival equipment</li> </ul>
Environmental	Relating to the natural world and the impact of human activity on its condition.	<ul style="list-style-type: none"> <li>• Weather</li> <li>• Animals, insects, plants</li> <li>• Climate change</li> <li>• Natural disasters</li> </ul>

<sup>12</sup> Michael Goggin, "20 Strategic Planning Models to Consider," ClearPoint Strategy, November 2, 2021, <https://www.clearpointstrategy.com/strategic-planning-models/>.



### Legal

Connected to law or a government's system of rules.

- Legal documents of festival
- Limitations of a festival
- Fees and fines
- Legal actions that can be taken against festival

### 5C analysis

The second method is the 5C analysis, it is a tool that looks at the internal and external factors that affect a project. This tool looks at 5 Cs: Company, Customers, Competitors, Collaborators and Climate<sup>13</sup>.



<sup>13</sup> Michael Goggin, "20 Strategic Planning Models to Consider," ClearPoint Strategy, November 2, 2021, <https://www.clearpointstrategy.com/strategic-planning-models/>.



- Business cycle, inflation and other economic factors
- Legal
- Technology



## SWOT Analysis (Internal Factors)

SWOT is an acronym for Strength, Weaknesses, Opportunities and Threats<sup>14</sup>. This is an analytical tool that looks at the internal factors of a projects:

<p><b>Strengths</b> What did you do well? What unique resources can you draw on? What do others see as your strength?</p>	<p><b>Weaknesses</b> What could you improve? Where do you have fewer resources than others? What are others likely to see as weaknesses?</p>
<p><b>Opportunities</b> What opportunities are open to you? What trends could you take advantage of? How can you turn your strength into opportunities?</p>	<p><b>Threats</b> What threats could harm you? What is your competition doing? What threats do your weaknesses expose to you</p>

## Organic Model of Strategy Planning

The Organic Model takes an unconventional approach because it focuses on the organization’s vision and values, versus plans and processes. With this model, a company uses “natural,” self-organizing systems that originate from its values and then leverages its own resources to achieve goals, conserve funds, and operate effectively<sup>15</sup>.

In the simplest form, there are three basic steps to follow when implementing the organic model of strategic planning:

### 1. Stakeholders clarify vision and values.

This is a collaborative process that could involve both external and internal stakeholders— who’s in the meeting depends entirely on your organization’s ultimate purpose for the planning. The goal is to establish common visions and values for all stakeholders.

### 2. Stakeholders create personal action plans.

<sup>14</sup> Michael Goggin, “20 Strategic Planning Models to Consider,” ClearPoint Strategy, November 2, 2021, <https://www.clearpointstrategy.com/strategic-planning-models/>.

<sup>15</sup> Ibid.



The unconventional aspect of this model comes into play here. Divided into small groups, stakeholders determine the actions and responsibilities for each person to work toward the vision (according to the values).

### 3. Stakeholders report results of action plans.

Each person will take ownership of their plan and update the group on their progress. This is a communal approach to accountability and the progress reported can lean toward qualitative, versus quantitative, results.

What type of company would the organic strategic planning model work best for? If your organization has a large, diverse group of stakeholders that need to find common ground, a vision that will take a long time to achieve, and a strong strategic emphasis on vision and values (instead of structure and procedures), this may be the right model for you. It would also be beneficial for younger organizations that need to gain funding without presenting a formal strategic plan.<sup>16</sup>

## 4 Towards building a sustainability plan for festivals

### Vision, mission and aims

Organisations will give their vision and mission to the general public but aims are more of an internal communications tool. As it relates to how the mission will be carried out this information is usually given to staff and programme development partners.

- **Vision:**

The big dream is usually in the form of a statement. Vision rarely changes as it is the foundation that everything is built on.

*E.g. To create a platform for up and coming painters to showcase their art in Malawi*

- **Mission:**

How to ensure the big dream comes true. Mission can be edited but not extensively as it is closely linked to vision

*E.g. Hold a festival once a year in the capital city to raise the profiles of up and coming painters*

- **Aims:**

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<sup>16</sup> Michael Goggin, "20 Strategic Planning Models to Consider," ClearPoint Strategy, November 2, 2021, <https://www.clearpointstrategy.com/strategic-planning-models/>.



Breaking the mission into valuable pieces that make the bigger picture. Aims can be moving targets as they adapt to the various internal and external changes in the organisation. A festival that is just starting will not have the same aims after 10 years of operating, they will be adjusted.

*E.g.*

- *Showcase as many artists as possible*
- *Create conversations about the painters*
- *Bring variety of art in the capital city*

#### 4.1.1 Festival examples

<b>Festival name</b>	<b>Festival of Hallows</b> ( <a href="https://gatheringfestival.wordpress.com/our-mission-and-vision/">https://gatheringfestival.wordpress.com/our-mission-and-vision/</a> )
<b>Vision</b>	Residents, businesses and organizations from all backgrounds live, play, work and support each other in an inclusive and vibrant downtown south Vancouver community.
<b>Mission</b>	The Festival of Hallows aims to use art, performing arts and special events to leverage public enthusiasm and participation with the goal of building a positive community in Vancouver’s Downtown South. The festival will raise the community profile and foster an environment where residents, businesses, and cultural, social and service groups, from across a diverse range of economic, ethnic and social backgrounds are inspired to create an inclusive, vibrant and prosperous neighbourhood.
<b>Festival name</b>	<b>Festival International de Louisiane</b> ( <a href="https://festivalinternational.org/mission-vision/">https://festivalinternational.org/mission-vision/</a> )
<b>Vision</b>	Festival International de Louisiane is a premiere International music and arts festival known for bringing a variety of unique and emerging performers to Louisiana. The 501 (C) (3) organization is committed to maintaining the festival as non-ticketed and free to the general public. The family-oriented event is held each year in downtown Lafayette, Louisiana. Our loyal audience, comprised of local, national and international patrons, return year after year.
<b>Mission</b>	Enrich the community with a celebration of its native cultures through performing arts.



Educate the public of the historical achievements and artistic expressions of related global cultures while developing an appreciation for the arts.

Develop culture and tourism, as well as enhance economic development by expanding Louisiana’s reputation as an arts center and a destination for artistic events.

<b>Festival name</b>	<b>Festival Musique Du Bout Du Monde</b> ( <a href="https://musiqueduboutdumonde.com/en/mission-vision-values-and-goals/">https://musiqueduboutdumonde.com/en/mission-vision-values-and-goals/</a> )
<b>Vision</b>	In keeping with its deeply held values, Musique du Bout du Monde is a leading presenter and producer in the Gaspé. The Festival Musique du Bout du Monde is a tourist attraction with a national and international profile.
<b>Mission</b>	The managing organization Musique du Bout du Monde organises quality events in order to discover and celebrate different cultures through music and other art forms.

<b>Festival name</b>	<b>Gateshead International Festival of Theatre</b> ( <a href="https://www.giftfestival.co.uk/">https://www.giftfestival.co.uk/</a> )
<b>Vision</b>	Founded in 2011 by Festival Director Kate Craddock, in response to a gap in the regional cultural offer, GIFT is committed to presenting contemporary and experimental practices that otherwise wouldn’t be seen in the Northeast.
<b>Mission</b>	The festival supports artists at all stages of their careers, enabling them to use GIFT as a space to come together, to take risks, and test out new ideas. We embed opportunities for audiences to get involved, and to connect with artists and their work across all festival activities.



#### 4.1.2 Other examples

##### When the doors reopen - Working Session

COVID-19 has hit hard in practically every aspect of our lives and economies. We, in the arts industries, have been severely affected. At the moment we are facing an unprecedented global reality and we do not know what our world will look like if/when this is over. Do we try to revive what we were doing before or do we need to re-think and reboot, with new approaches and new ideas? What will be the role of art and how do we prepare for a post-COVID world, where audiences may be anxious about coming back to watch theatre performances and other public events?

For more content: [Link 1](#) | [Link 2](#)

##### Government Intervention and the arts - Working Session

Governments have always been conducting a complex relationship with artists. On one hand artists have been a major force to inspire social and political revolutions and on the other hand, artists have always contributed and enjoyed the existing social and political stability. The growing dependency on governmental support in the contemporary world for the arts has deepened the differences between artists coming from countries with well-funded governmental support for the arts and those that lack this support system. This leads to major questions about the liberation of artists and the arts from government influences and intervention.

For more content: [Link 1](#) | [Link 2](#)

##### Festivals & Money - Working Session

This session is designed to be a fast and fun gallop through the often uncomfortable and slippery realm of money, finance and funding. As the world tentatively emerges from the COVID crisis, we as festival makers are struck even more by money's mercurial nature. Some arts organisations have been flooded with resources to lead recovery through the arts for their city, region or country, others cut off even further from the modest income streams they had pre-2020. It goes without saying that there are huge socio-political machinations implicated in all of this, which we do have the power to one day change over the long term. The question is: what can we do for ourselves right now? This session hopes to exercise and expand on practical methods, ideas and mindsets that we as festival makers can adopt today to gain a better insight into money and its strange behaviour whilst also improving our festivals and ourselves.

For more content: [Link](#)



## Art X Company

[Art X Company](#)'s mission is to enable and articulate value for the arts and culture sector in India through data-driven insights, strategy-led impact, and audience outreach. A strategic consultancy operating at the intersection of arts and access, Art X Company offers consulting, research, curation, audience development and management services to the cultural sector in India. We conceptualise, curate, and execute interdisciplinary initiatives and research projects across cultural and creative industries in India. Our work includes museum collaborations, multi-genre performances, literature encounters and studies in the arts sector.

## Re-imagine: what's next? – Australia Council for the Arts Paper

The COVID-19 pandemic has completely disrupted the arts and cultural industries. The pandemic has illuminated pressures we were already feeling. It is bringing to light aspects of our industry many have long wanted to change, along with new issues we are now being forced to address.

Future disruptions are inevitable, and the arts and cultural industries must rapidly adjust to ensure they don't just survive but thrive in the future.

We have heard from many artists, cultural practitioners and organisations through industry roundtables, surveys, informal conversations and focus groups. We have heard from you as you deal with and respond to the immediate crisis, and whilst you consider how to start thinking productively about the future.

Access the paper: [Link](#)

## Embodied Leadership

Through the [Embodied Leadership](#) framework, we help people work better together using non-verbal, action-based and experiential approaches.

Our practices, drawn from dance and theatre, enhance focus and attention, improve communication, build positive group dynamics, and develop the collaborative leadership capacities required in our 21st century reality.

## **Legal status**

There is a myriad of ways in which festival can set itself up as an organisation and from country to country the options can be drastically different. What is important is that you choose the legal status that will allow you to achieve your aims and vision in the most efficient way.

Firstly, is your festival For-Profit or Not For Profit? The former is generally defined by its ability to deliver any profits it makes to its owners or shareholders. The organisation will ordinarily pay tax



which can be anywhere between 40% and 0% and further tax incentives can vary from state, county, or province and even between industries. A commercially focused festival in Hungary for instance would only pay around 9% in corporate tax while one in France close to 30%. The organisation is often overseen by a board of directors which can be made up of those that own and run the organisation depending on their stake or number of shares in the company. Check with your local business registration office to find out more.

While potentially very lucrative for all involved commercial corporations are usually more time consuming administratively and corporate tax accountant fees are costly. You will not be able to receive anywhere near as much public funding for your art related activities nor receive charitable donations from philanthropists. That said, if you believe that your festival is better served by pursuing commercial returns via the box office and the sale of goods and services then this might be the best direction for you.

An emerging format of commercial structure is the social enterprise. In short, is a commercial corporation that passes on a portion of its profits to benefit a social or charitable cause.

More commonly festivals and arts organisations are set up to be Not-For-Profit or Non-Profit organisations, the profits or surplus received from delivering on the organization's mission are absorbed back into the organisation to be retained, reinvested on organisational growth, or better achieving initial purpose. The legal status of a NFP organisation as I said will vary from place to place but there many are common attributes, they do not pay corporate taxes of any sort on revenue or surplus monies made, there is a board or committee of management (usually made up of volunteers) providing oversight and usually a NFP will be able to access some level of charitable status from their tax office. The most typical structure chosen is an incorporated association or registered association (Verein) often limited by some type of legal guarantee providing a level of legal indemnity to all involved. This model is also shared with charities, sporting clubs or any common interest group coming together in a formal way. The founders need to register the business by gathering a committee of management, usually volunteers who have a vested interest in the vision and mission of the new organisation and vote the organisation into existence. Once this is done with the meeting minutes as proof one can open a bank account and finalise all other registrations with your local authorities. At the first meeting it is likely that the constitution or governance for the organisation will be agreed on, this document outlines the rules for how the organisation will run at a governance level. Templates for constitutions can normally be sourced from your local business affairs office which you then can adapt to your needs.

## Charitable Status

In Germany for example as long an association Verein at time of founding has a purpose that is deemed socially beneficial such as art and culture charitable status is immediately granted. Therefore, the organisation can receive donations from philanthropists and donors to be used to forward the mission of the organisation. The donor in the case of some countries can then receive



major tax deductions for their generosity. In Australia for instance though they can receive donations not all charities can provide their donors with a tax-deductible receipt unless granted Deductible Gift Recipient (DGR) status making those without this less attractive to donors looking for tax breaks while to return to Germany again as an example the tax incentives are immediate as long as the recipient is registered correctly. Ironically, Germany has a much smaller culture of philanthropy due to generous government funding and has less need to use the seamless bureaucracy around giving when it comes to sustaining arts and culture...for now.

The final thing you want to consider when choosing a legal status is certain restrictions on types of organisations by your potential major funders. Public funding bodies are becoming somewhat less concerned with organisational make-up and are satisfied that there is some sort of tax status and responsible persons at the helm. That said, there are still major funders who will only provide not-for-profits that are incorporated associations and have achieved a level of charitable status or recognition. So, think about where you envisage the majority of your funding will be coming from, do they have guidelines around eligibility when it comes to organisations? It is a good idea to seek these out and read over them.

## Leadership and succession planning

Picture this, you have founded a new festival in a medium sized city somewhere in the world. The vision filled a gap in the local ecology and satisfied a need that audiences had locally, nationally, and sometimes even internationally. The organisation was set up as an association with a management committee of volunteer supporters some of them with deep pockets and good connections. They provide good governance oversight and support but let you and your growing staff member get on with the task at hand which is putting on a great festival. You have presented several editions now and gathered acclaim and a strong following. As its founder and leader, you feel the pull of new ideas, challenges, and potentially new roles at other exciting festivals. You are going to tell your management committee that you plan to resign. You feel confident that while they will be sad to see you go, the festival you have given so much energy will not cease to be in your absence but rather will continue to go from strength to strength with new operational leadership. It can do this because you and the committee did a few intelligent things early on and thought about legacy and succession.

Start early: You began talking about your need for new horizons with your board and peers as soon as possible. Do not keep the desire inside and do not fear that others will be shocked or that it might spread disunity. The more openly considered the more the organisation can plan for transition and buffer against the winds of change.

Form a task force within your CoM whose job it is to seek out your replacement through their networks and advertisement and management the recruitment. Even if your organisation decides to use an external recruitment agency it is a good idea to do this. No one know what your organisation needs better than you.



Look internally for a successor first. You have spent so much time and money on those that work alongside you day after day. They know the organisation better than any. Could there be someone within the ranks who with the right mentoring could lead? This goes for any junior staff who show promise options to take on new challenges and promotions within the organisations contributes greatly to long term staff retention.

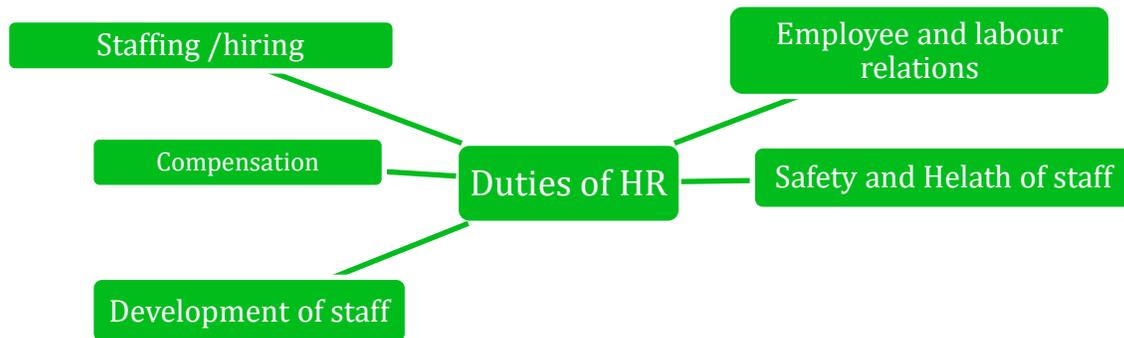
Organise for there to be a long hand over period. Allow the new incumbent to observe and learn for as long as possible before taking over the reins. Introducing them to all major stakeholders and partners. Doing so will set them up for success and set up your organisation for a stronger future.

Have a policy that dictates what the committee of management will do in the event a of sudden leadership departure so they can move quickly into action and decisively fill any leadership vacuum, quelling doubt among stakeholders as soon as possible.

## Human resources

Here are seven of the most important human resources functions in manufacturing companies, which can be extended to festivals:

- Talent Acquisition/Recruitment. ...
- Compensation Management. ...
- Benefits Administration. ...
- Training and development. ...
- Performance Appraisal and Management. ...
- Employee and Labor Relations. ...
- Compliance Management.



The top 10 responsibilities that apply to HR in this industry include:

1. Developing job descriptions



2. Advertising new positions
3. Conducting interviews
4. Training
5. Work allocation
6. Managing performance and expectations
7. Payment and rewards
8. Time keeping
9. Event safety
10. Mental safety of staff

## Infrastructure

Unless based within a venue or site-based arts institution festivals tend to be on the infrastructure light side. Bringing all the logistical and technical elements needed for the festival together just prior to the event. When investing in infrastructure, think about whether you can share it with others, use it as an income source by hiring it out while not in use or whether there is an equivalent that you could use in-kind or for very little in your area. Also think about your moral and social economic impact on local businesses. One scenario being that for years your festival has hired chairs and tents from a local event company for a decent rate, what will cancelling that order do to that business? Could that be avoidable?

Social responsibility around supporting and stimulating local business is vital to think about as is the environmental sustainability of infrastructure and infrastructure needs. Infrastructure around artists' transport, accommodation and audience will inevitably have a higher carbon footprint.

Artists Transport - if you are flying artists from elsewhere to your festival you must consider the carbon footprint and general cost in relation to the future sustainability of your festival.

Top tips are:

- Get the artist to stay in the general region for as long as possible. Either through extended engagement with your festival or by partnering with nearby events and venues to create a tour or a suite of different engagement types.
- Share in hard infrastructure such as technical equipment such as seating or lighting with other similar organisations within your area. Perhaps you could co-own these things with the local city.
- Fly economy where possible and use public transport or carpooling to move the artists around on the ground. This might not suit certain artists who are unused to more egalitarian modes of transport. Only you can decide which is more of a priority for your festival.
- Where viable see if artists and even audiences can take up paid accommodation within the homes of locals. Hotels have a higher footprint due to cleaning, the buildings they occupy and numbers of staff. But keep in mind, what is your festival's part in promoting local



businesses such as this? Could you work with your accommodation partners to pursue a more sustainable future for all?

Finally, you can buy your way out. Many festivals will add an extra charge to tickets for the purchasing of carbon credits and similar initiatives such as tree planting.

## Partnerships

“A partnership is an arrangement where parties, known as business partners, agree to cooperate to advance their mutual interests. The partners in a partnership may be individuals, businesses, interest-based organizations, schools, governments or combinations”.<sup>17</sup>

Partnership is about compromise not surrender.

“Partnership management is the process of following up on and maintaining effective, productive, and harmonious relationships with partners. It can be as informal as phone calls, e-mails, and social visits or as formal as written, signed agreements that partners review periodically. What is most important is that you invest the time and resources needed to maintain partnerships, you communicate regularly with your partners and you both have the opportunity to assess how things are going”.<sup>18</sup>

“On its own, what WWF – or any organization – can achieve is limited. Working with partners lends WWF projects greater credibility and broadens the scope of what the projects can achieve. In good, effective partnerships, the partnership itself will represent more than the sum of the individual partners”.<sup>19</sup>

Any individual, group or institution including governments and donors whose active participation and support are essential for the successful implementation of a project or programme.

It is important to develop partnerships early, this helps to establish a good relationship in time for implementation of the festival. The lead-up time allows the relationship to work how they best work with each other.

Stakeholder analysis should be undertaken during the design phase of the festival.

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<sup>17</sup> “Partnership,” Wikipedia (Wikimedia Foundation, June 25, 2021), <https://en.wikipedia.org/wiki/Partnership>.

<sup>18</sup> WWF, “Step 3.4 Partnerships and Partnership Management,” April 2007, [https://awsassets.panda.org/downloads/3\\_4\\_partner\\_management\\_may\\_20\\_2007.pdf](https://awsassets.panda.org/downloads/3_4_partner_management_may_20_2007.pdf).

<sup>19</sup> WWF 2007, 1.



“Your partners will likely be drawn from this larger pool of stakeholders, but they differ from stakeholders in that they represent a smaller pool of individuals and institutions that need to be directly engaged in the planning and implementation of your project. Over time, however, your project, the context in which it takes place, and/or the partnerships themselves will evolve. Thus, it is important to revisit your partnerships and stakeholder analysis at various points in the planning and implementation process to ensure all key partners are involved and engaged and that it is clear to all involved what is expected of each partner”.<sup>20</sup>

“How your team cultivates and manages its partnerships will vary greatly by the type of partner and the relationship between your team and that partner. In general, however, cultivating and maintaining partnerships involves three main steps: **1)** Establish and review partnerships; **2)** Determine governance; **3)** Formalize partnerships; and **4)** Maintain strong relationships with partners. Although we present these steps separately, they are often occurring in tandem. Because of the evolving nature of partnerships, it is also likely that you will have to revisit these steps several times over the course of your project”.<sup>21</sup>

A festival cannot survive without partnerships, there are two kinds of partnerships:

1. **Sponsor partnership:** this is another organisation that supplies you with resources to deliver your festival. The resources could either be in kind or cash. Examples include venue, transport, media coverage, marketing, finances, security, etc There is great focus on a partner who can provide them with money, but in-kind partners could offer more essential services that end up reducing the budget or providing more output for input e.g., an advertising company partnership would give the festival free publicity in exchange for very little from the festival but help the festival achieve more of its goals.
2. **Program delivery partnership:** This is a partner who helps you deliver the actual content of the festival e.g., a dance festival could have a partnership with a dance academy, the academy is not giving money or anything in kind but is a major curator of the program. These partners are different from the first because while sponsor partnership may influence the curator slightly, program delivery partners are part of the team. Both partners need to understand the vision of the festival, but these ones need more of an understanding because they are delivering the actual festival.

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<sup>20</sup> WWF 2007, 2.

<sup>21</sup> WWF 2007, 2.



## Environment and climate change mitigation

For in-depth analysis see the Atelier Tool for Climate Change and Environmental sustainability.

## Funding

### How and why funding/financial support for festivals differs from region to region

Across the world the festival has been a key element in artistic and cultural output particularly since the end of the second world war. The proliferation of festivals, events and biennials has been vast and a well-researched phenomenon. A festival's reason for being is often not just due to the showcasing of art but rather a mix of adjacent and complementary things such as adding value to tourism offerings, accentuating a particular time of year or particular place, the nadir of a year round community spirit, the marking of seasons, the celebration of something divine, it could be a gift to a community for contributing to a larger entity such as a corporation, or it could be a showcase of something the location is renowned for or finally a site of coming together when all other avenues of unity seem hopeless.

Festivals the world over have many different drivers and motivators and therefore how they are funded can come in many forms but there are some constants. Some countries have highly developed public funding systems that fund festivals for the common good, others do not and yet festivals flourish, funded via public subscription, donations and ticket sales, others are entirely funded by a large business as part of its sense of responsibility to the population who works for it or buys its products. Whichever the case funding generally comes from one of 5 places.

Box Office/ticket sales, government grants, sponsorship from a corporation or large organisation such as a religion with a community focus, Major philanthropy via a formal trust or foundation, and finally individual giving via many small donations or subscriptions.

### Case Study – Income Diversification – Castlemaine State Festival, Australia

Money, the final frontier. As a festival maker you will be constantly seeking funding for your event from multiple sources at any given time. A diversity of income sources is increasingly recommended but, in some cases, a single or only a few sources is all that's needed. A festival's total income will likely come predominantly from these 5 areas.

- Box office Sales (20%)
- Government Funding (40%)
- Corporate Sponsorship (16%)
- Major Philanthropic Gifts from Trusts or Foundations (12%)
- Individual giving (12%)



The percentages against the list are the breakdown of the sources for my own festival here in Australia. What are they for you? What do you think they will be in the future? If a Black Swan event such as C19 has shown the arts industry anything is that it is not a good idea to be overly dependent on any given stream of income. Even Government funding. Reducing dependency on any given area does not mean reducing it in cash terms but rather increasing other areas to create balance.

Think about diversification within each area. Here is my breakdown on the 40% of government funding from each level of government we engage with.

- Federal or National: 40%
- State, Staat, Province, County: 53%
- Local Government, City, Gemeinde: 7%

As you can see, we are highly dependent on funding from our State government within this subsection of funding. Our funding from the local area is tiny and a problem we are working with local partners to rectify. The national average for public funding received by arts organisations from local government in Australia is 26% of total government funding received. What if there was a problem with seeking funding from the bigger areas of government? We would be in a terrible position so balance in the long-term must be achieved in this instance if we are to maintain a fiscally responsible outlook. The same thinking can be applied to any area of income that you might have coming in. Zooming back out to the initial 5 areas. You can see for yourself that we are generally overexposed to risk in the areas of government funding and box office. My time with the organisation has been spent strategizing and pursuing methods of boosting the last three areas.

What can you do to strengthen areas of income that are underperforming in your festival?



## 5 Festival business models

### Case studies of different kinds of festivals from around the globe

#### 5.1.1 Publicly funded festivals

Most of the major international arts festivals run based on this business model where the fund from public sector is the main support to arts and cultural festival. The fund could be from the district, city, state, or the federal government.

- **Taipei Arts Festival 臺北藝術節 (Taipei, Taiwan)**

Taipei Arts Festival is presented by Taipei City Government and co-organized by Taipei City Government Department of Cultural Affairs and Taipei Culture Foundation. The main idea is Taipei as a hub for international participation and not only introduces works of originality and creativity but also produces cross-genre performances, cultural exchange with other cities, supports promising artists, and establishes its status in the Chinese speaking world.

Website: <https://www.artsfestival.taipei/index.aspx>

- **George Town Festival (Penang, Malaysia)**

George Town Festival is a project by George Town World Heritage Incorporated (GTWHI), endorsed by the Penang State Government and fully supported by the City Council of Penang Island (MBPP) and Penang Global Tourism (PGT) in celebration of local and international works of art.

Website: <https://georgetownfestival.com/2019/>

Even though most of the funding is from public sector, the festivals will still need to look for sponsorship/partnership from private sector to cover the rest of the cost/expenses. The private sponsorship/partnership could be in the form of cash or in-kind.

#### 5.1.2 Private sector sponsorship festivals

- **The Park's New Festival (India)**



The Park's New Festival is the only contemporary private arts festival that has a national touring component showcasing new and emerging work in the field of dance, music, and theatre in India. The Festival showcase 3-4 different performances in six metropolises of India- Chennai, Hyderabad, Bangalore, Kolkata, Mumbai, and Delhi.

The Festival host three evenings of dance, music, and theatre and performances have to premiere at the festival. The Festival has supported artists to produce new work or curate new works. International works will be presented in the Festival as long as the work is either has Indian element or it was inspired by India.

Website: <http://www.theparksnewfestival.com/>

- **Dance Umbrella (Johannesburgh, South Africa)**

Dance Umbrella was supported for the first 26 years by the corporate sector. The last six years were difficult as the access to funding was limited with no interest from the city or government in assisting the platform. The festival closed down after 30 years due to lack of funding.

The Dance Umbrella started as an open and free platform for artists to show work on a series of mixed bills. The 10th edition we commissioned new work and opened the platform to international artists. The last 20 years we curated mostly full-length programmes but continued to assist young artists in presenting work.

Website: [https://esat.sun.ac.za/index.php/Dance\\_Umbrella](https://esat.sun.ac.za/index.php/Dance_Umbrella)

### 5.1.3 Public-private festivals

### 5.1.4 Festivals run only on box-office income

### 5.1.5 Free festivals: examples

- **Pesta Boneka #7: International Biennale puppet festival (Yogyakarta, Indonesia)**

Pesta Boneka (means a puppet festival in Indonesian) in Yogyakarta, Indonesia is an independent, international puppet biennale, initiated in and produced since 2008 by Papermoon Puppet Theatre.

This festival has a range of programmes for the local communities and foreign visitors to participate. However, the dilemma of having free festivals is, does the festival help to build the audience? Or set an invisible barrier for the audience to support the artists and festivals by buying tickets (which is a source of income)?



Website: <https://www.papermoonpuppet.com/pesta-boneka/>.

#### 5.1.6 Online-festivals

- **Tempo Dance Festival (New Zealand)**

Website: <https://tempodancefestival.co.nz/>.



## Summary of business models based on case studies

Factors impacting on the choice of business model. The business models of a festival will determine the funding source, or it goes another way round. The business models will then determine the scale of the festival and how the festival will sustain itself through the period of the time.

- **Who initiate or kickstart the festival?**

If the Festival is initiated by government bodies, the funding source will be more secured. Certain amount of the fund should have parked under the annual budget of the bodies. If the Festival is initiated by a collective or artists, the biggest challenge will be source for the very first fund in order to kick start the festival. The source of the fund will then decide business models.

- **Vision and mission of the festival:**

Is there any specific agenda that need to achieve through the Festival?

- **The targeted audience:**

Who are the targeted audience you would like to reach in your Festival?  
Are they interested in your Festival? Are they able to afford to purchase tickets?

## 6 Festival programming/curation and how they impact on sustainability

See the Atelier Toolkit on **Curating and Programming**.



## 7 Sustaining a Festival in a time of COVID-19

Let's not beat around the bush, COVID 19 has been and remains a massive headache for those of us in the live performance industry and the arts in general. Our business models, artforms and existential reasons for being are by and large predicated not only the involvement of humans *en masse* but their physical presence. Artists communicating and communing with a live audience. Audiences and artists travelling from far and wide to experience art. COVID has put a stop to this for many festivals.

### ■ A comprehensive list of challenges encountered by festivals

Make a comprehensive list of all the challenges encountered by Festivals in a time of COVID-19 (e.g., lockdown restrictions, physical distancing, loss of funders, cancellation of flights, etc).

[Presentation: Atelier for Solidarity](#)

### ■ Festival dealing with restrictions

How may festivals deal with restrictions caused by the existential threats posed by COVID-19? (Provide case studies where festivals have responded).

### ■ Impact on sustainability

How has COVID-19 and its related restrictions impacted on the sustainability of Festivals?

### ■ Particular challenges and opportunities for sustaining physical festivals

What are the particular challenges and opportunities for sustaining a physical festival that has to conform to Lockdown restrictions?

[Presentation: Atelier of Solidarity](#)



## Particular challenges and opportunities for sustaining on-line festivals

What are the particular challenges and opportunities for sustaining an on-line festival in a time of COVID-19?

[Presentation: We, together, will survive!](#)

[Presentation: Challenges in time of Covid19](#)

## Which learnings and sustainability strategies undertaken by Festivals during the COVID-19 era may be taken forward beyond these times, and be integrated into Festivals in the future?

Local engagement

Online administration/collaboration (internal)

Online presentation/augmentation/ancillary outcome (External)



## 8 Risk analysis and management

### Identifying risks

Before holding your festival, all risks need to be identified to ensure that they do not occur or to ensure if they do occur all the right procedures are available to counter them.

#### Internal and External risks

“A good tip - once you have identified as many as you can, think about the impact they could have if something went wrong and the likelihood of that happening. That will help you to prioritize your time and resources and provide a good starting point for your crew to start really delivering on the risk management side of your event”.<sup>22</sup>

“The consequences of not carrying out the right risk management measures for your event can be catastrophic. But don't stress, if you've taken the appropriate steps to identify hazards, assess the risks, prioritized them and put suitable plans in place, you and your crew will be ready to deal with them if they arise”.<sup>23</sup>

Knowing your risks allow you to get the most relevant insurance for your festival.

“Of course many risks are out of the event organiser's control. In this case it is important that the risk management plan details who is responsible for coordinating the safety of every person should something that is out of the control of the event organiser occur”.<sup>24</sup>

Types of risks:

#### 1. Harm to humans:

these fall under security risks that could befall your audience, staff and other humans around the festival. We look at the structures inside and around the festivals and also the danger that comes with holding a festival e.g., thief, harassment... while looking at physical harms we also need to look at psychological harms. Have you done all that was needed to ensure your audience leaves with their mental state intact? These security risks also do change according to your audience types, a festival for adults will not have the same security measures as a festival for children. Think of marginal groups as well, physically challenged...

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<sup>22</sup> Blerter Team, “10 Safety Risks Every Event Manager Should Plan For,” Blerter, accessed November 4, 2021, <https://www.blerter.com/blog/the-top-10-safety-risks-every-event-manager-should-plan-for>.

<sup>23</sup> Blerter 2021.

<sup>24</sup> “Community Event Risk Management - Moreland City Council,” accessed November 4, 2021, <https://www.moreland.vic.gov.au/globalassets/areas/arts-festivalslib-4055/event-permits/community-event-risk-management-template--small-events.pdf>.



**2. Harm to employees:**

Aside from the normal risks for a human there are others specific to employees, over working, over stressed, bad mental working space, bullying, harassment...

**3. Harm to reputation:**

As well as protecting the audience you need to ensure you protect the image of the festival and those associated with it. If you believe there will be a large of heavily intoxicated individuals you need to have a security system that caters to drunk and blacked out people while also providing an environment where irresponsible drinking is discouraged, that is because you do not want your festival to hold that reputation if your mission to hold a successful music festival. Your partners also do not want to be seen supporting a drunken festival, it can also make them believe you are not invested in your vision.

**4. Harm to location/equipment:**

Where you hold your festival and the equipment you use needs to be protected. Buildings, cars, PA systems, laptops etc. Is security setup to ensure that all the risks that could fall upon said devices are controlled or mitigated. Apart from the physical you need to think of the environment. Ensuring you are controlling or mitigating the harm done to the environment.

**5. Harm to finances:**

The financial risks of a festival, over budgeting/under budgeting, sources of income/capital.

**6. Harm to success:**

All the things that could prevent you reaching your goals, not enough lead up time, clashes with other events, financial loss, availability of resources and equipment, legal constrictions.

## Assessing risks

There are risks the event creates, and external risks that the event organiser has little control over but may need to be managed at the event:

- Event and Production Equipment
- Crowd Management
- Children Attending or Participating
- Transport and Traffic Management
- Staff and Volunteer Safety
- Medical Assistance Requirements
- Unpredictable Weather
- Potential Fire Hazards
- Food safety



- Aggressive Behavior
- Surfaces that are not even.

These risks can also be assessed by making use of the previously mentioned PESTEL tool, and the table below describes the types of risk in further detail:

Political	<ul style="list-style-type: none"> <li>- Government support (or lack of)</li> <li>- Government stance on freedom of expression (some countries frown upon artists that criticize certain aspects of their administration)</li> <li>- Festival unintentionally supporting certain causes (mostly in a politically unstable environment festivals need to be careful they are not supporting propaganda)</li> <li>- Visas</li> </ul>
Economical	<ul style="list-style-type: none"> <li>- Funds to hold festival</li> <li>- Financial standing of audience</li> <li>- Financial status of the area/village/country/world</li> </ul>
Social (crowd control)	<ul style="list-style-type: none"> <li>- Accessibility (Entry and exits in the festival and roads leading to the festival i.e. creating traffic)</li> <li>- Emergency assembly points</li> <li>- Signage</li> <li>- Emergency services available (health, fire, victim support units...)</li> <li>- Potential for crowd pushing</li> <li>- Disability access</li> <li>- Child protection</li> <li>- Children</li> <li>- Antisocial or aggressive behaviour</li> <li>- Queues (box office, toilet, food,...)</li> </ul>
Technological	<ul style="list-style-type: none"> <li>- Electrical currents</li> <li>- Pack up and pack down</li> <li>- Tripping hazards</li> <li>- Equipment affected by weather</li> <li>- Lifting equipment</li> </ul>
Environmental	<ul style="list-style-type: none"> <li>- Natural disasters</li> <li>- Weather e.g rain, snow, humidity, heat, wind, flowering of plants (allergies)</li> <li>- Animals around site e.g bees, wasps</li> </ul>



Legal

- Permits
- Visas
- 

Other considerations

- Lifting equipment
- Personnel managing traffic
- Personnel managing security

Have a list of all nearby hospitals, clinics, fire houses, police stations, social services agencies...

How is food being provided, stored and cooked...

Secondly, ensure you have fire extinguishers easily accessible throughout your event. They may just be the thing that stops a small fire in a kitchen turning into your whole venue going up in smoke. Finally, make sure you advise your local fire service that your event is taking place and let them know the accessibility points for the fire engines; in the “unlikely” event you need to call on them.

**Risk Assessment Table**

		Consequences			
		Major e.g. death, disability, large financial loss	Serious e.g. serious injury, cash flow shortage	Minor e.g. first aid injury, temporary supply shortage	Insignificant e.g. incident but no injury, non- essential staff ill
Likelihood	Very likely, almost certain to happen	Extreme risk	High risk	High risk	Medium risk
	Likely, will probably happen at some time	High risk	High risk	Medium risk	Medium risk
	Unlikely, could happen at some time	High risk	Medium risk	Medium risk	Low risk
	Very unlikely, might happen rarely	Medium risk	Medium risk	Low risk	Low risk

Source: <http://www.adminbandit.com.au/how-to-assess-risk>



## Mitigating risks

When planning for mitigating risks at your festival/organisation, you can make use of a table listing your potential risks, their levels of danger, how to cancel/mitigate them, and the resources you need for such mitigation. The template below demonstrates how to start such a table:

Type of risk	Description of risk	Risk level	How to cancel/mitigate risk	Resources need
Political	Risk 1	Extreme risk	Control measure 1	
	Risk 2	High risk	Control measure 2	
	Risk 3...	Low risk		
Economical	Risk 1			
	Risk 2			
	Risk 3...			

Even with careful planning (and best intentions), things can go wrong. Whether it's a public transportation meltdown or a shortage of food, don't face the unexpected without a rock solid communication plan.

Social media is one of the fastest, and broadest, ways to communicate with your attendees. This makes it one of the fastest, most impactful forms of communications. As for what to say, these three best practices can help you keep your cool when a problem arises:

1. Respond as soon as you can.  
If disaster strikes, people will be looking to your social accounts for an explanation. Try to get a message out to attendees quickly — just remember, the information needs to be accurate.
2. Don't get defensive.  
Even if the issue is out of your control, understand where the complaints are coming from. Maintain a professional tone to every response.
3. Re-evaluate scheduled content.  
Consider the other content that you had scheduled to post on social. If attendees are upset, it might be better to table that *#tbt* post you had lined up.<sup>25</sup>

Risk management template [The Organic Model of Strategic Planning](#)

<sup>25</sup>Ronnie Higgins, "4 Event Risks You Can Easily Avoid," Eventbrite US Blog, December 4, 2019, <https://www.eventbrite.com/blog/4-event-risks-ds00/>.



## Reviewing risk management

Risk management plans need to be reviewed regularly as things can change overnight but the following are major times when they need to be updated:

- Days before the festival;
- Daily during festivals;
- End/beginning of year review;

Documents needed:

- The initial risk assessment
- The developed Risk Control Plan
- An Emergency Management Plan
- Traffic Management Plan – where applicable
- Waste Management Plan – where applicable
- Site safety induction checklists – for staff working on the event or site

It is important to remember that every event is different and has different resources available.

The most important part of creating a risk management plan is that you, the event organiser, can reduce possible risks as much as possible and have thought about what you would need to do in the event of an emergency during your event.<sup>26</sup>

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<sup>26</sup> Moreland City Council, “Event Permit,” Moreland City Council (Moreland City Council, June 25, 2021), <https://www.moreland.vic.gov.au/exploring-moreland/events/planning-an-event/event-permit/>.



## 9 Evaluation

### Why evaluation is necessary

#### 9.1.1 Definition of evaluation

- "Evaluation is a process that critically examines a program. It involves collecting and analyzing information about a program's activities, characteristics, and outcomes. Its purpose is to make judgments about a program, to improve its effectiveness, and/or to inform programming decisions".<sup>27</sup>
- "Event evaluation is concerned with assessment, which usually involves measuring a set of key variables, as well as monitoring those variables to determine positive and negative outcomes. It is a subjective determination that can utilise objective quantitative measures<sup>28</sup>".

Evaluation is often one of the last considerations of festivals in terms of time, budget and human resources. An evaluation can be conducted by the internal team (do-it-yourself process) or an external party (full-scale and professional study), it depends on:

- Scale of the festival: a weekend festival and a month-long festival will require different level of resources
- Funding source: certain funding scheme/programmes will require the type of evaluation they want to see
- Your festival's need: what do you want to know from the evaluation?
- Resources: this refers to budget, time frame and human resources you have. Do you have enough budget to hire someone from an agency to conduct the evaluation or your staff has to work on it? How much time do you have to conduct and analyse the evaluation?

Before you decide to have an evaluation for your festival, you need to set the objective clearly so that you could select the most appropriate tools to get the outcome you desire<sup>29</sup>.

Your objectives can be based on:

- a) Process: to measure the programmes in the festival, programme quality and who it is reaching; useful in identifying inefficiencies and streamlining processes;

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<sup>27</sup> Michael Quinn Patton. Qualitative Research Evaluation Methods. Thousand Oaks, 1987, CA: Sage Publishers.

<sup>28</sup> Donald Getz. Event management and event tourism (1st ed.), 1997, New York: Cognizant Communications Corp.

<sup>29</sup> Vipul Nanda, "The 7 Types of Evaluation You Need to Know," Atlan, August 7, 2019, <https://humansofdata.atlan.com/2017/04/7-types-of-evaluation/>.



- b) Impact & Outcome: the immediate and long term effect of the festival and how it is aligned with the festival objectives/goals, it reflects how well the festival objectives have been achieved through the curated programmes;
- c) Summative: considers the entire festival and future perspective; useful to justify the project on what they have achieved and lobby for project continuation<sup>30</sup>;

The outcomes can be:

- a) Quantitative
  - to measure tangible data, ie how many, how much, how big
  - the outcomes are normally data that can be presented in numbers or percentages
- b) Qualitative
  - to measure intangible values, such as awareness, appreciation and change of behaviour
  - more complex

The outcome of the data will be able to:

- provide a better understanding of your target audiences' (demographics), their needs and satisfaction
- monitor the creative process to deliver the objectives
- increase the productivity and effectiveness of your festival
- collect tangible data for impact report or grant report to partners and sponsors
- analyse the impact of the festival
- understand the improvement for the following festival
- build a database of knowledge for developing new programmes in the future<sup>31</sup>.

## ■ Possible evaluation tools

### 9.2.1 Questionnaire / Surveys

"A questionnaire is a specific set of written questions which aims to gather specific information from the respondents. Questions can be open or closed-ended. This is commonly used to gather information from mass samples, for example, festival goers/visitors/participants/audiences in order to have enough data to understand the pattern<sup>32</sup>".

Questionnaire can be conducted in different manners:

- Online

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<sup>30</sup> Nanda 2019.

<sup>31</sup> Nanda 2019.

<sup>32</sup> Josiah Kaplan, "Questionnaires," BetterEvaluation, August 31, 2015, <https://www.betterevaluation.org/en/evaluation-options/questionnaire>.



- Can be conducted on-site and off-site;
  - On-site: online questionnaire can be conducted by having a few gadgets in common areas/information counter/ticketing counter in the festival sites;
  - Off-site: email the questionnaire to your audiences or collecting the data via a form (ie Google Form, SurveyMonkey, jotform) but not everyone who receive the links will click on it to fill up the form;
  - a small reward, ie promo code on tickets, small gift might be able to encourage the audiences to take part in the questionnaire.
- Paper and pencil
    - This can be an alternative if you don't have the budget to have a few gadgets on-site
    - Cons: you need to key in the data before you could proceed with the data analysis.
  - person-to-person interview
    - If you have sufficient number of surveyors, you could consider having person-to-person interview which will give you more in-depth information, but it's more time consuming compared to the above two<sup>33</sup>.

### 9.2.2 Focus Group Discussion (FGD)

- Normally consists of 8-12 individuals from similar backgrounds or experiences to discuss a specific topic of interest in a loosely structured discussion with a moderator/interviewer.
- Qualitative tool where questions are asked about the respondents' perceptions, attitudes, beliefs or opinions.
- Respondents are able to talk with other group members instead of to the interviewer only.
- This can be used to understand the feedback from certain groups, ie artists, contractors/suppliers
- Cons: Respondents may be reluctant to share some sensitive or personal ideas and concerns among the group members<sup>34</sup>.

### 9.2.3 Stakeholder evaluations: audience, artists, partners, stallholders, etc

In order to have an overview of the festival and more inclusive, you may consider to involve people from different aspects:

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<sup>33</sup> Kaplan 2015.

<sup>34</sup> Sushil Baral, Sudeep Uprety , and Bipul Lamichhane, "Focus Group Discussion" (Health Research And Social Development Forum, March 2016), [https://www.herd.org.np/uploads/frontend/Publications/PublicationsAttachments1/1485497050-Focus%20Group%20Discussion\\_0.pdf](https://www.herd.org.np/uploads/frontend/Publications/PublicationsAttachments1/1485497050-Focus%20Group%20Discussion_0.pdf).



- **Internal**
  - working team (permanent, project/contract basis, part time)
  - volunteers
- **External**
  - festival goers/visitors/participants/audiences
  - artists/performers
  - contractors/suppliers, ie venues, logistics
  - stallholders/vendors
  - Business owners around the sites/venues (Food & Beverage, Hotel, Retail)
  - partners/sponsors

**Links:**

- [Thundering Hooves](#) - a research into the 2005/6 Festival season comprising the 11 festivals that made up the then fledgling Festivals Edinburgh.
- [Evaluation and Audience Research Toolkit - Supporting Evaluation of Family Arts Festival Event](#)

## 10 Tips and templates for public and private sector funding

### 10 Tips for the public sector funding

- **Do your research**
  - What is the timing of the grant? When are others coming up? Do they work with your timelines?
  - Do read the program guidelines thoroughly, make sure you're eligible and your application answers all criteria. This is what you'll be assessed on.
  - Do research previous grant recipients for an indication of the types of activities supported. Check news stories for previous projects. Does your application fit in - - the program's aims?
  - Don't be afraid to call the funding body. Pick up the phone or send an email.
- **Don't assume anything**
  - Don't see your artform, genre or project type on the previous recipients list?
  - Don't assume the Assessment Panel know who you are. Make sure you explain who you are and what you've done.
- **Plan ahead**
  - Do gather your support material and any letters of support. Don't leave this to the last minute.



- **Budgets matter**
  - Do a thorough budget, work out your expenses and projected income. The Assessment Panel need to see your project is viable and the grant money will be put to good use. Make sure your budget is well researched and realistic.
  - Do refer to the program guidelines on the any funding requirements and what can or cannot be supported.
  
- **Avoid waffle**
  - Do bin the jargon and use clear, plain language. Members of the Assessment Panel may not be familiar with your practice so make sure anyone can understand your application.
  - Do be upfront about what you want the funding for. The Assessment Panel needs to know exactly how you plan to spend the money, so make sure your project description is clear and not buried within the questions.
  - Do describe what you will do, not just who you are. Imagine you're the assessor, what would you want to know about the project?
  
- **Make your case**
  - Do supply high quality support material and only include it if it's directly relevant to your application. Refer to the program guidelines of what needs to be provided.
  - Do include notes and captions, they help the Assessment Panel link the supporting material to your project.
  - Don't be modest. Remember the onus is on you to make a compelling case. Why should the government support your project? What's the value of your project in a broader context?
  
- **Before you hit send**
  - Have you had someone else read through the application? It's often helpful to have someone unconnected to your field of expertise read it, like a family member or close friend. If they don't understand what your project is and what you're asking for, it's time to revise.
  -
  
- **Links:**
  - [The importance of Human Resources in successful event management](#)
  - [How to write a successful grant application](#)



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## Tips for the private sector funding

Follow the same tips above when writing a grant for a private entity such as philanthropic trust or foundation, but don't be afraid to go deeper and be more specific. You are dealing with more often than not an individual or small group with a focused agenda around their hard-earned money should go and how it will be used to enact change. Go to the heart of why you deserve and need this money. Also engaging with this type of funding is highly relationship based. Securing a modest amount one year and delivering above expectations will not go unnoticed and you can easily experience a boost in funding therein. Demonstrating the impact the funding has done is key.

- **Links:**
  - [10 safety risks every event manager should plan for](#)
  - [Tips to get Grant Funding](#)



## 11 Forms of fundraising that have worked for festivals

### ■ Crowdfunding

[A Grantseeker's Guide to Trusts & Foundations](#)

### ■ Individual patrons/angels

As your festival emerges and becomes more known you may discover that certain people wish to support your efforts by giving your organisation a donation of money to help you pursue your vision and goals. What's more several of these people could make themselves known to you and wish to contribute regularly. If this is something you are experiencing congratulations it is a great sign that you are on the right track building love and loyalty within your audiences and community. How to manage their payments is a question for you and your team to arrange between each supporter. There are lots of payment platforms that can help streamline on-going donation arrangements such as Stripe or Square and there is nothing wrong receiving a regular cheque in the mail.

What is more important to consider is why did these start giving? Who are they and how do we find more of them? And how do we look after them so they maintain their giving or even increase it?

Unless they are the "angel" donor type and have been giving to the festival since an early stage of formation your patrons or donors come from your audiences. They are your loyalist attendees and informal ambassadors of your event. They decide to give to your festival because they have the means, sometimes barely, and wish to take their loyalty, love and commitment to your festival to a new level. Often it is hard to comprehend that you have created something with your team that inspires such adour and largesse in people but you have and should be proud of the fact. When one has a sizable number of donors like this it is a good idea to not only recognize them through mentions in programs, websites and in speeches but create a formal program around them that monitors and maintains connection. A year round calendar of events that show your appreciation to them as collective and provides deeper access and engagement with the festival they so love. Everyone wants to be a part of something bigger than themselves and you can give that to these supporters in spades.

Your donors are not just any old audience members, they are the repeat offenders. An emotional and personal connection is key. Rather than wait for these individuals to make themselves known you can do a few things to grow your donor base<sup>35</sup>.

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<sup>35</sup> Aubrey Bergauer, "Audience Development: The Long Haul Model," Medium (Medium, February 15, 2019), <https://aubreybergauer.medium.com/audience-development-the-long-haul-model-3c381a8c0072>.



Start with data, mine your ticketing data to discover who has attended your festival more than twice and cross reference that with how many events attended at each edition, if you have the capacity cross reference with postal code info if you have it to discover even more interesting results. You will now have a list of your most loyal audience members. You should even be able to glean who is your most loyal ticket buyer. Do you know this person? After recently completing this process myself and with a donor base of 200 individuals I was surprised to learn that no one in the organisation had ever met the person who over a decade had bought the most tickets and attended every edition. They were a mystery to us and yet our most passionate supporter!

You can now begin to migrate your loyal attendees into your donors program if you have one or simply encourage them to give in their own way. Just be sure to recognize the longevity of their commitment when you ask for the donation and make it as personal as possible. At first asking for donations from those that have already given so much at the box office can be a little confronting but you will in time get used to it and ultimately see it as a natural part of audience engagement.

Once in your donors program or on a regular giving plan do not relax! Maintain connection and ownership, gently encourage to increase regularly. After 5 years has passed for each donor it is time to speak with them about considering a major gift in their lifetime (\$5000+ = 3000euro) if they have the means, again don't be shy and if not in their lifetime request to be recognized in their will in the form of a bequest. <sup>36</sup>

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<sup>36</sup> Bergauer 2019.



## 12 Conclusion

Sustainability is becoming more and more a reality for the design of a festival. From considering sustainable business models that can permeate from environmental issues to the impacts left by a festival, this toolkit was aimed at providing theoretical and practical information, examples, tools and templates for helping festival managers to design future festivals in a sustainable way.

Sustainable business practices should be seen as a whole that encompasses all the stages of a festival-making – since the idealization process until the post-production and legacy management. In this context, festivals can benefit from sustainable practices by becoming more stable, reaching far audiences and generating resonating impacts in the industry.

We trust that some of the ideas in this Toolkit and the experience of implementing sustainable business practices into the festival realm will resonate with readers and will encourage and inspire them for future editions of their festivals.



## 13 Appendix: Resources

### Funding

#### 13.1.1 General funding

[FUNDFINDER: Guide to funding opportunities for arts and culture in Europe, beyond Creative Europe - 2019 edition](#)

#### 13.1.2 Local/Regional funding

- [Jerusalem Foundation](#) – For activities promoted in the city of Jerusalem.
- [Iberescena](#) - Space focused for those who construct performative arts for Europe.
- [Ibermúscas](#) is a multilateral international cooperation program dedicated exclusively to the musical arts that fosters the presence and knowledge of Ibero-American musical diversity. The Program for the Promotion of Ibero-American Music was approved at the XXI Ibero-American Summit of Heads of State and Government, held in Asunción, Paraguay in November 2011 and is framed within the Ibero-American Cultural Space of the General Secretariat Iberoamericana (SEGIB). Is a network of 13 countries (Venezuela, Uruguay, Perú, Paraguay, Panamá, México, Ecuador, Cuba, Costa Rica, Colombia, Chile, Brasil & Argentina).
- [FONCA](#) – Support system for the creation of cultural projects in Latin America.

### Useful websites



Description	Link
Asia Europe Foundation (ASEF)	<a href="https://asef.org/">https://asef.org/</a>
Information Europe Theatre Meeting (ITEM)	<a href="https://www.ietm.org/">https://www.ietm.org/</a>
Tips for writing grant applications	<a href="http://www.leoisaac.com/evt/top071.htm">http://www.leoisaac.com/evt/top071.htm</a>
Culture – The Fourth Pillar of Sustainable Development & Sustainability	<a href="https://www.blerter.com/blog/the-top-10-safety-risks-every-event-manager-should-plan-for">https://www.blerter.com/blog/the-top-10-safety-risks-every-event-manager-should-plan-for</a> <a href="https://www.clearpointstrategy.com/strategic-planning-models/">https://www.clearpointstrategy.com/strategic-planning-models/</a> <a href="http://www.agenda21culture.net/documents/culture-the-fourth-pillar-of-sustainability">http://www.agenda21culture.net/documents/culture-the-fourth-pillar-of-sustainability</a> <a href="http://www.agenda21culture.net/sites/default/files/files/documents/en/zz_culture4pillarsd_eng.pdf">http://www.agenda21culture.net/sites/default/files/files/documents/en/zz_culture4pillarsd_eng.pdf</a> <a href="https://www.investopedia.com/terms/s/sustainability.asp#:~:text=Sustainability%20focuses%20on%20meeting%20the,profits%2C%20planet%2C%20and%20people.">https://www.investopedia.com/terms/s/sustainability.asp#:~:text=Sustainability%20focuses%20on%20meeting%20the,profits%2C%20planet%2C%20and%20people.</a> <a href="https://www.lexico.com/en/definition/sustainability">https://www.lexico.com/en/definition/sustainability</a> <a href="https://www.sustain.ucla.edu/about-us/what-is-sustainability/">https://www.sustain.ucla.edu/about-us/what-is-sustainability/</a>
The Functions and Goals of HR	<a href="https://courses.lumenlearning.com/boundless-business/chapter/the-functions-and-goals-of-hr/">https://courses.lumenlearning.com/boundless-business/chapter/the-functions-and-goals-of-hr/</a>
Crowdfunding	<a href="https://blog.cake.hr/importance-human-resources-successful-event-management/">https://blog.cake.hr/importance-human-resources-successful-event-management/</a>
Risk management	<a href="https://www.eventbrite.com/blog/4-event-risks-ds00/">https://www.eventbrite.com/blog/4-event-risks-ds00/</a> <a href="https://www.moreland.vic.gov.au/arts-and-festivals/community-events-guide/events-guide-contents/events-permits-risk-management.html">https://www.moreland.vic.gov.au/arts-and-festivals/community-events-guide/events-guide-contents/events-permits-risk-management.html</a> ...



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