



## MODULE 5

# Part 1: Event operations and logistics



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**Disclaimer:**

These notes are adapted from the University of Cape Town and GetSmarter's course notes for Module 2 of the Events Management elective offered as part of the blended version of the UCT Postgraduate Diploma in Management and Marketing.

**Learning Outcomes:**

**LO1:** Explain event operations and logistics management in terms of its role within the events industry as a whole.

**LO2:** Interpret operational plans for key aspects of an event.

## 1. Introduction

In business, it is often said that failing to plan, is planning to fail, and this is equally true for events. When working on the operational and logistical components of an event, the operations team (together with the event manager) brainstorms ideas for the best possible way to build up, run, and breakdown an event, taking into account multiple factors ranging from weather and guest considerations, to venue suitability, infrastructure, supplies, and facilities. The operations team must function as an integrated unit throughout the event project, and communication and coordination between different members within the team is essential to the event's success.

## 2. Event operations

From a management perspective, operations management encompasses the design, planning, organising and supervision of products, processes, or services, and has a strong emphasis on converting inputs into desired outputs in an efficient manner (Dhoul 2014; MIT Sloan School of Management, 2016). Operations managers must give careful thought to all the processes involved in acquiring and using resources in such a way that the intended goods or services are delivered to the client.

Event operations management is similar to operations management in that it designs and manages products, processes, services and supply chains related to events. It looks at the most efficient ways of using resources in order to meet the objectives of the event. In terms of the event industry, operations management involves the build-up, live event management, and breakdown of the event. It is this "on-the-ground" management and building of the event that requires careful planning and on-site project management.

Managing the operational side of an event involves cooperation between numerous different parties, including contractors, suppliers, authorities, public services, and attendees to name a few. The organisation, planning and coordination of each relevant task will determine the success of an event, and it is imperative that event managers give enough consideration to the operational and logistical side of the event. Operations management requires attention



to detail, excellent teamwork, and the ability for team members to anticipate and adapt to change.

An event manager must always be able to keep the bigger picture in mind (i.e. focus on the end goals and objectives of the event), and consider how each task or process can be improved to streamline processes (Bromley et al., 2010:294). Each part of, or task within, an event should be managed as its own entity, whilst simultaneously keeping in mind its relationship to the event as a whole. This way of planning allows greater control on the part of the event manager and leaves less room for error.

## 2.1 Logistics management

Logistics is the “discipline of planning and organising the flow of goods, equipment, and people to their point of use” (Shone & Parry, 2013:169). For events, the “goods” encompass customers, products, and facilities, and the “point of use” would be the site of the event. For example, an event company that is tasked with organising an international motorsport event in South Africa would need to ensure that all the technical equipment is brought into the country and cleared on time for the event, that trucks are ready to deliver the goods to the venue, and that the necessary equipment is on site to offload the trucks. They may also need to manage and arrange accommodation for international event staff and handle all their travel arrangements and transport within South Africa. The aim of logistics is to ensure that processes run smoothly, resulting in customer satisfaction and service excellence (Bromley et al., 2010:294-295).

A national- or international-level exhibition event, for example, may require:

- Liaising with various municipal or city councils, departments, and organisations.
- Preparation of documentation required for traffic control, parking, security, and post event clean up transportation by road, rail, and air of goods for the event and people attending the event.
- Organising which contractors are required in what order to prevent traffic issues and over-crowding at the event site.
- Storage and control of on-site materials and equipment
- Preparation of documentation required for import of music performers equipment or exhibitors show stands.

Every aspect of the event is broken down into individual tasks, each requiring their own scheduling and resources. Logistics within an event can also involve moving goods and merchandise from one destination to another. On small events, the event manager can manage the majority of the logistics themselves, but on larger events, a logistics manager or logistics company should be brought in to manage all the logistics.

A national- or international-level event may require the following logistics:



- Liaising with government departments or other organisations
- Preparing documentation required for import and export of cargo
- Transporting cargo by sea, air, road or rail
- Warehousing and distributing cargo
- Insuring and tracking cargo
- Consolidating cargo
- Obtaining customs clearances
- Procuring and managing and resources
- Developing risk management strategies relating to resources (for example, cargo theft)

A logistics manager should have extensive knowledge of the rules, regulations, policies, procedures and documentation necessary for the moving of all types of goods.

It is useful to identify the different phases of an event as they relate to logistics. HSE (1991, cited in Bromley et al., 2010:295), lists the following event phases as seen from a logistical viewpoint:

- **Planning or build-up:** Includes site selection, contracting suppliers and the construction of infrastructure and services.
- **Load-in:** Equipment delivery and installation (for example, tents, stages, lighting and sound, chairs and tables).
- **The event:** The management of the guests, transport and operational strategies (for example, transporting guests and suppliers to and from venues, taking delivery of food and cleaning supplies).
- **The load out:** Removing all equipment and non-essential services from the site (for example, packing up music and sound equipment, removing decorations, packing up catering equipment).
- **The breakdown:** The removal of all the infrastructure and waste (for example, deconstructing the stage and hospitality areas, emptying trash cans and cleaning the venue). The build-up and breakdown are usually the most logistically-intensive phases.

By splitting the event into these different phases, event managers are able to easily identify and manage logistics in each phase. It also allows them to plan in advance and anticipate opportunities and challenges at each stage of the event so that they will know what needs to be organised in advance (Bromley et al., 2010:295).

### **Operations manager vs logistics manager:**

It is often difficult to understand the difference between an operations manager and a logistics manager, largely because they often cover the same jobs on site at times. However, on large-scale events, the two roles do become more apparent.

A logistics manager tends to be the person brought in on large-scale events, which require a substantial amount of equipment being moved around, transported and stored for periods of time. Additionally, if the event is on an international scale, and goods and people are coming into airports, shipping ports, crossing borders in large trucks etc. then all of the imports, exports and clearances would be handled by a logistics manager. The perfect example of this would be an event like the Volvo Ocean Race that had a designated logistics partner to handle the equipment travelling around the world from one event to the next.

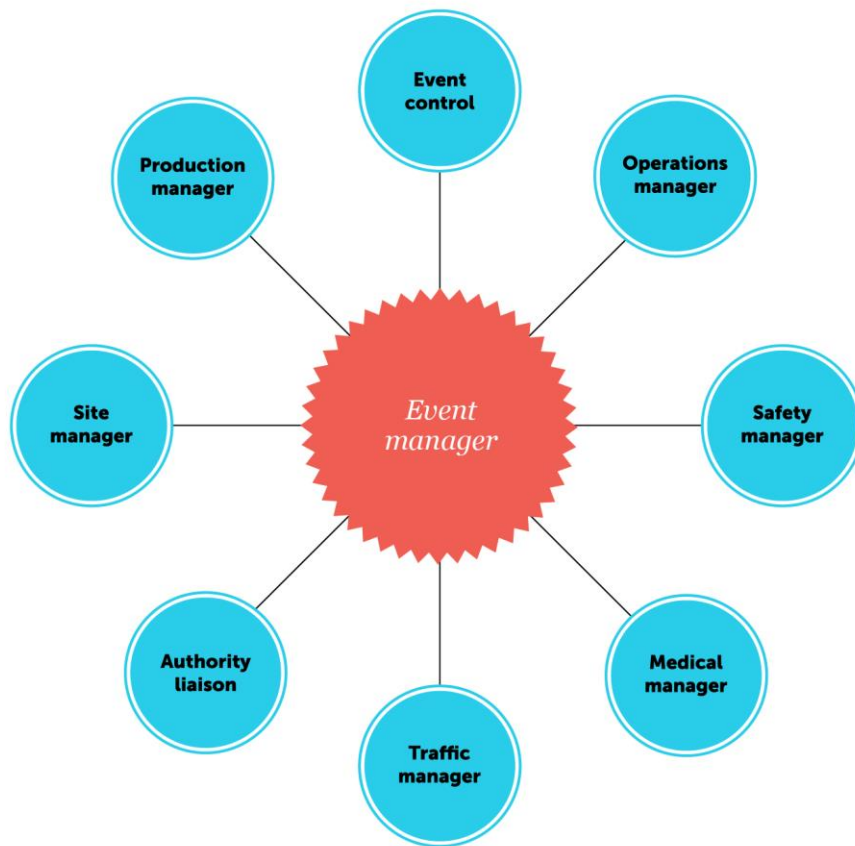
An operations manager also tends to work on large-scale events, and they run the ground operations, so to speak, managing anything from temporary structure builds, bringing in of toilets and the installation of power and water, to staffing, managing venue restrictions, and fencing.

Smaller events and corporate events generally do not require either an operations or a logistics manager. The event manager handles all site operations, if they are not too complex. In many cases, the event manager is the operations and logistics manager, if they have experience in that field.

## **2.2 The event operations team**

An event operations team can comprise a number of representatives from different stakeholder groups, including representatives from the local authority, the events management company, the client, the venue, emergency services, and the suppliers and contractors (Bromley et al., 2010:296). It is important that representatives from diverse specialisations and industries are on the team, because a key purpose of the operations team is to combine their knowledge and experience regarding practices for managing an event successfully, and then apply this knowledge to the specific event they are working on (Bromley et al., 2010:296). Each representative will be able to provide a different perspective on the event based on their area of specialisation and thereby ensure that the correct procedures are implemented across all aspects of the event.

Figure 1 demonstrates an ideal team scenario. However, most events, unless they are on a very large scale and have large budgets, do not have as big a team as depicted in the figure. The operations manager, for example, would do the job of the traffic manager, authority liaison and site manager on a smaller event.



**Figure 1:** Event operations management team. (Adapted from: Bromley et al., 2010:297)

The operational team will always report to the event manager. The event manager still makes all the final decisions with the overall event objectives in mind.

### 2.2.1 Team communication

Having access to the expertise of representatives from diverse backgrounds is not enough; the team has to be able to communicate effectively in order to make the most of each person's knowledge and skills. Communication is especially important in the event of an emergency, and clear reporting lines and levels of communication should be established in order to minimise confusion and misunderstandings.

Bromley et al. (2010:297) identifies three main levels of communication between event operations team members:

1. **Inter-agency communication:** Clear communication channels need to be set up between the event manager and external parties such as the local authorities (for example, the police department and local municipality) and emergency services (for example, the fire department and paramedics).

2. **Communication between site suppliers and contractors:** Different contractors working on the same event will have to be able to communicate with each other in order to clarify role descriptions, areas of responsibility, and to avoid duplication of work and hindering another contractor's work. For example, the painting and building contractor needs to communicate with the cleaning contractor in order to ensure that areas where construction and maintenance took place are cleaned after, and not before, the maintenance is complete.
3. **Communication with the public and local community:** The public (including local residents) is an important stakeholder in an event, and the event manager needs to ensure that any operations aspects that may affect the public are communicated clearly.

Communication needs to be sustained throughout each stage of the event, from the planning phase through to the breakdown.

## 2.3 Operations plans

An operational plan should be produced after the team has been selected and schedules, responsibilities, and details of the specific site or venue have been obtained. The overall event operations plan will include specific details about the event on a high level, and this plan will be broken down into a site safety plan, transport management plan, emergency plan, and medical (first aid) plan. Figure 2 outlines the relationship of each plan to the overall plan.

Members of the operational team are usually responsible for the various operational plans, as they have the specialised knowledge and expertise needed to complete specific sections, but the event manager tends to take on this responsibility and might just gather information from the various members. On smaller-scale events the event manager will fulfil the role of operations manager too.



**Figure 2:** Overview of the events operations plan. (Adapted from: Bromley et al., 2010:298)



### 2.3.1 Overall event operations plan

The overall event operations plan clearly defines all the operational objectives for the event, the timelines, and the order in which they must be completed, as well as the person or company responsible for completing them. The plan should include the following aspects:

- **Venue assessment:** An audit of the available space, surrounding structures and buildings, and general venue conditions such as surface type and stability, and ground level and angle.
- **Structure descriptions:** Details of structures that will have to be erected, where they need to be placed, who is responsible and how it will be done.
- **Audience profile:** A description of the target audience, including their ages and how many people are anticipated to attend.
- **Site capacity:** An outline of the overall site and any separate venues and areas within it, taking into consideration space accommodated by structures such as marquees and staging. The capacities relate to the risk management planning.
- **Event duration:** An estimate of the event duration, venue opening and closing times (if the event is held over multiple days), and timetables outlining acts and entertainment.
- **Food and beverage stations:** Profiles of each food and drink provider, including their location and infrastructure needs (for example, water and power considerations).
- **Restroom facilities:** An outline of the number of toilets and their locations.
- **Water supply considerations:** A description of where water supplies are located, whether hot water is needed, and the distances the water needs to travel to reach the necessary points.
- **Power considerations:** A description of where power points are located, and whether generators may need to be brought in. The distances between points are also important to take into account, as is the amount of power required at each point.
- **Special effect descriptions:** An outline of any planned special effects (such as firework displays) that may feature in the event entertainment, detailing the special arrangements and permissions that will need to be acquired.
- **First aid points:** A description of where first aid points are located (including where the helipad may be located if one is necessary).

(Bromley et al., 2010:298)



The overall event plan deals with the event as a whole, and provides a global picture of what tasks need to be carried out. There are also specialised plans that are developed for important facets of the event. These are dealt with below.

### 2.3.2 Safety and security plan

The event safety officer usually compiles the safety and security plan. If there isn't an event safety officer, it will be compiled jointly by the security company and the event manager. The safety and security plan details the following:

- **Distribution of security personnel** throughout the event site, with their numbers and rank. Some areas will require more security than others, such as VIP areas, entrance and exit points, as well as any cash handling areas.
- **Site safety rules** that apply at all times. Some of the rules should be clear to the attendees and visible on boards throughout the event, for example, a sign that reads, "Enter at your own risk". These rules link to the risk management plan and also guard the organiser against liability.
- **Security plans at entrances and exit points.** The entrance is generally the most important security position, as it is the first point of security and is the ideal place to identify any potential hazards such as drugs, firearms, and drunken attendees.
- **VIP security plans**, if necessary. VIPs commonly bring their own security. It is important that external security personnel are briefed and that they remain in contact with the overall event security company.
- **South African Police Services (SAPS) involvement**, if applicable. SAPS attends most large-scale public events and act as an extra security measure. They deal with any major problems and have the capacity to make arrests on site.
- **Structural plans and layouts** of each area. It is important for the security company to have access to all layout plans, especially emergency layout plans. This will allow them to pinpoint and find areas a lot quicker in the case of an emergency or security alert.
- **Details of all stakeholders and people involved** in the event. It is vital to have all contact details of the major role players, as security may need to contact them urgently during the course of the event.
- **Arrangements for fencing off and securing the venue**, if necessary. Event venues need to be secure sites. This will also mean they are easier to guard, especially at night.
- **Details of all stakeholders and people involved** in the event. It is vital to have all contact details of the major role players, as security may need to contact them urgently during the event.



- **Arrangements for fencing off and securing the venue**, if necessary. Event venues need to be secure sites. This means they are easier to guard, especially at night.
- **Risk assessment**. This outlines that you have considered all the potential risks, but more importantly how you are minimising or removing those risks.
- **Event health and safety**. Abiding by all health and safety by laws is essential.
- **Stage, temporary structures, and infrastructure**. Provide an overview of any major structure, of their manufacturer and any health and safety notes such as wind speed ratings.
- **Electrical systems**. Information on the level of power that is required and how this is being provided and maintained on site.
- **Food, refreshments, and traders**. You are likely to provide food not only for your guests but also for your crew. Give information in the event safety plan about the food – how many caterers you will have on site and the types of food-preparation techniques they will be using.
- **Waste disposal**. Detail your plan for this – whether you will be having recycling bins, how often these will be emptied and whether you are employing litter pickers, for example.
- **Security and stewarding**. Include information on how many staff will be on site and any particular processes they will need to follow.
- **Organisation and contractors**. You should include information on the people on site in your event safety plan. An organisation chart helps show outside readers how your on-site team is structured and who is responsible for what.
- **Communications**. Provide a basic overview of your communication plan in your event safety plan.
- **Medical/first aid provision**. Detail who on site will be available to provide first aid attention and how they can be contacted. This is expanded on in your medical plan.
- **Fire precautions and equipment**. Your health and safety advisor and production manager will be able to help you fill in this section of the event safety plan. The plan should show where exit routes are, how many extinguishers you have, where they are, and who will use them in case of an emergency. This will also be expanded on in your emergency plans
- **Sanitary accommodation**. Include information on how many toilets are provided and how often they will be serviced during your event.



- **Emergency procedures.** This is an area where the local authorities desire great detail to know that you are competent to deal with emergencies on site. This will be expanded on in your emergency plan.
- **Event inspection.** Cover who will inspect your site when and sign off the site in terms of structures and health and safety.
- **Accident reporting and investigation.** An overview of your process needs to be included.
- **Provisions for people with special needs.** Adhering to the Equality Act is important. Provide information in your event safety plan as to what visitors with various special needs need to do.
- **Contingency plans.** Show the local authorities that you have considered all the main potential issues by putting contingency plan examples in your event safety plan.

### Additional security considerations

There need to be enough evacuation points in case of emergency, and security staff need to be fully briefed on emergency evacuation procedures. A PA system is also essential at larger events to broadcast emergency or security plans. Security checkpoints are needed at all entrances, to check for illegal firearms, drugs or alcohol.

#### How to protect your guests:

Ensuring that an event is safe is not simply matter of placing men in suits at the front door, and careful planning needs to go into ensuring that guests and service providers are safe always. Briefing the security team thoroughly is essential to protecting your guests.

When planning larger events (especially public events such as concerts, theatre shows, and festivals) SAPS should conduct a bomb sweep before the start of an event. If the event is running over a few days, a bomb sweep should be done daily before the event opens to the public.

A venue operations centre (VOC) needs to be present at all events, as it serves as the safety and security hub of the event. It is from this venue that all relevant safety and security operations are controlled, and where the head of the security team will be based. From this centre, the head of security can liaise with other parties such as SAPS and the disaster management team.

Ticket money should be taken off site on a regular basis to minimise the risk of the event being targeted. A professional cash and carry company should be used. These types of security requirements apply mainly to large-scale events. When it comes to small-scale events such as corporate functions and weddings, the security and safety plans are less elaborate and require far less manpower and planning. Depending on the client, security may or may not be requested or necessary (Parry & Shone, 2013:256). If the event is taking place at a venue and the set-up is happening a few days prior to the event, then security needs to be in place over those days and nights as well to ensure the safety of the stock. Sometimes



the venue can provide the security and other times it needs to be brought in by the event manager.

### 2.3.3 Transport management plan

The transport management plan may be compiled by a transport manager, if there is one, or otherwise jointly by the transport company and the event manager.

The objectives of a transport management plan should be:

- Reduced delay for motorists attending the special event through more active dissemination of information, traffic management, and alternate mode use;
- Reduced delay for motorists not attending the special event through active promotion of alternative routes or modes;
- Reduced overall traffic demand at or near the special event site through active promotion of alternative routes or modes or dissemination of information, resulting in the cancellation or delay of unnecessary trips; and
- Improved safety through more active traffic management and reduced motorist frustration

With proactive planning and managing of special events, the likelihood of these benefits is improved.

The operations manager needs to assess whether or not road closures, and therefore the involvement of the local traffic services, will be necessary. If this is the case, it must be specified on the event plan that is submitted to the local events office early in the planning stages of the event. The manager needs to identify if shuttles or buses will be needed; this is often the case when parking is not accessible near the venue. If an international conference were being planned for example, many of the guests would not be local and would therefore require transport to and from events and the conference venue.

One can get quite creative with transport ideas, for example, buses, vintage cars, helicopters, etc. Transport can also be a form of entertainment at the event; how people arrive is important as it is their first encounter with the event. Operations managers may be responsible for the travel arrangements of the guests or delegates. If it is a VIP event with a big budget, they could even be offered chauffeur driven services.

Checklists work well when compiling transport plans. Examples of transport elements would be group or delegate travel arrangements, transport needs for suppliers, employees, and visitors, as well as specialist vehicles. Integrating all transport modes is also important, including ships, trains, cars, aircraft, trucks and taxis.



Key components of the transport plan include the following:

- **Parking arrangements:** Location of staff and guest parking, and designated parking areas for buses and emergency vehicles. Staff and VIP guest parking is generally located as close to the event site as possible, and public parking may often require shuttles to ferry people to the event site. Parking areas should also be well lit if the event will be taking place at night or running into the night. Parking areas should also be well signposted so guests can find them easily.
- **Highway management:** May include a speed limit on certain roads or the enforcement of a one-way traffic system to protect pedestrians, especially if parking areas are located across a busy road. Special planning permission might be necessary to have roads temporarily closed; this needs to be approved by the local municipality and event office.
- **Entrance and exit details:** Details of entrance and exit routes and how these are to be managed.
- **Vehicle access and drop-off points:** Unobstructed access for emergency vehicles and, on large-scale events, a clear area for helicopter landing in case of emergency. Drop-off points for public transport providers.
- **Public transport arrangements:** To and from drop-off points. This is not always applicable, and event managers will commonly leave individuals to make their own arrangements if they are making use of public transport.
- **VIP transport:** Details regarding transport arrangements for VIP guests from accommodation and parking areas to the event.

(Bromley et al., 2010:298)

### 2.3.4 Emergency plan

The emergency plan is compiled by the risk assessment or disaster management team, if there is one, or otherwise by the event manager. This is a very important document and is essential on big events where there is greater risk of emergencies. This will include the following:

- **A number of scenarios that could occur**, such as bomb threats, fire, terrorism, crowd surges, or flooding, as well as the planned action to be taken.
- **An outline of each stakeholder's role** in case of a crisis; details of who should be contacted and what the chain of command is.
- **Details of on-call emergency personnel** and the quickest route to the nearest emergency room or hospital.



- **Details of the announcement procedure and equipment to be used**, as well as evidence of back-up services. For example, if there is a power failure and exit signs cannot be illuminated, a generator would be required.
- **All up-to-date layouts of the event site** should be in the VOC and readily available.
- **All key management should be in radio communication**, so that in the event of an emergency, they are able to communicate and execute the emergency procedures.
- **Evacuation routes and entry and exit points** need to be readily accessible and clearly signposted.

### 2.3.5 Medical plan

The event manager generally compiles this with input from the medical team. It includes the following:

- Layouts of the site, indicating first-aid points and toilets.
- The names and contact details of medical personnel on site.
- Local hospital arrangements and distances.
- Details about medical facilities and vehicles present on site, and the type of care they can provide.
- On larger events there would be a helipad in the case of an emergency helicopter airlift.

## 3. Catering management

At any event, whether a small birthday dinner or a large gala event, the quality and presentation of the food and beverages will strongly influence attendees' perception and overall enjoyment of the event. This is because an event is embraced with all the senses, and taste is a very prominent sense that needs to be well catered to in order to ensure a memorable event experience.

Depending on the nature of the event, the catering function can either be:

- In-house (supplied by the organiser or venue);
- Permanent contractors employed at the venue, or
- Ad hoc (sourced according to the event)

(Shone & Parry, 2013:59)





**Video 1:** Five key tips to help event managers plan the catering for their events. (Source: <https://www.youtube.com/watch?v=tmHxdkCiZ4Y>)

Catering comprises a complex mix of planning, organising, and design, and the nature of the event will influence the catering budget, choice of food, how guests are seated (if applicable), and how food is presented and served. The biggest challenge facing caterers and event managers today is menu planning, as it can be difficult to determine how to cater to a diverse range of tastes and dietary preferences, including anything from vegetarian, vegan, and halaal to kosher, banting, gluten-free, and lactose-free meal requests to name a few.

This can be especially difficult when catering for an uncontrolled event such as a large festival where thousands of individuals with different tastes and preferences demand food at different times during the day (Gasche & Ellis, 2010: 226). An event manager has to ensure that, regardless of the size of the event, that the catering is well planned for and that they establish a good working relationship with their caterers and suppliers.

Some key points to discuss with the caterer:

- The number of people in attendance;
- The demographic of the attendees and what food and beverages they expect;
- The budget;
- The presentation and service of the food;
- The theme or look and feel of the event;
- The guests' dietary requirements;





- The time of year and weather;
- What kitchen facilities are needed;
- The power and water requirements for the kitchen;
- The kitchen equipment needed and crockery and cutlery requirements;
- The seating arrangement inside the venue;
- Type of food service – for example, three-course budget or canape snacks on arrival;
- Time frames of the event and when the food and drinks need to be served;
- Staffing for F & B — how many, what are they wearing, and are they prepared;
- The venue — what infrastructure is there, how far is it from town etc.

#### **How catering works:**

The catering industry and the event industry are closely interlinked, and there is a vast array of information and resources available on catering that will not be covered in these notes. If you would like to find out more about how catering works and how it fits into the event planning context, [this comprehensive guide](#) by Katherine Neer from How Stuff Works provides a “behind-the-scenes” breakdown of how to:

- Communicate and manage a relationship with the caterer;
- Prepare a catering proposal for the caterer;
- Plan the event layout with the envisioned catering option in mind;
- Draw up a catering schedule for the event day;
- Manage the catering set-up, service, and clean-up, and
- Build a career in catering.

What is important to understand is that the goal of the event manager is to be aware of the importance of catering and to plan well in advance for any catering requirements to ensure that there are no food-related mishaps on the event day.

#### **Catering on a budget:**

Event managers should always try to source the best quality food and beverages (in line with the type of event) at the best possible prices. Whether they are planning a glamorous international conference or a non-profit organisation’s fundraiser picnic, finding ways to cut costs on catering can go a long way in staying within the event budget.



**Video 2:** Doug Biggs from Catering Toolbox shares some insights into how to plan catering for a large corporate event, including layout, food, and staffing considerations. (Source: [https://www.youtube.com/watch?v=YF34mA\\_iBzE](https://www.youtube.com/watch?v=YF34mA_iBzE))

## 4. Conclusion

Events do not operate in isolation; they are affected by a number of internal and external factors, from weather to poor management practices. The operations and logistics planning of an event allows for the management of all contributing factors to an event. It not only deals with the “on-the-ground” matters, but it also looks at all the planning that happens before an event takes place.

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