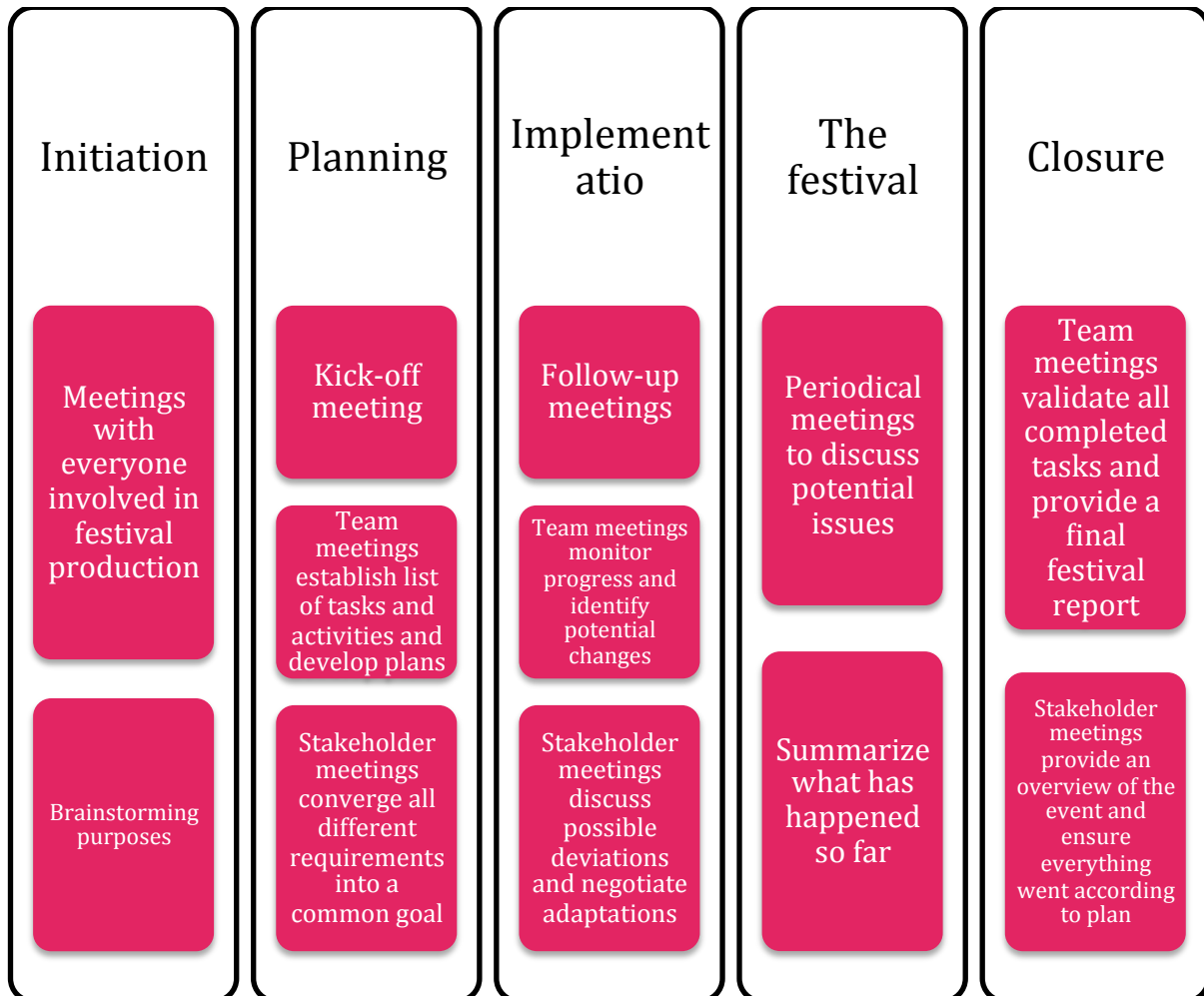


Appendix 2: Framework stream of activities detailed

• Meetings



Initiation phase

Initiating the festival requires a lot of preparation and it marks the beginning of a series of meetings that will have to be carried out throughout each phase of the framework. These meetings will begin in this phase with anyone that is involved in the conception of the festival from the start and will after involve more and more people as the planning develops. They are somewhat informal at this stage and take place more for brainstorming purposes.

As Getz et al (2010) propose in their cross-cultural study of festivals, planning in this phase begins with determining the profile of the festival. The profile of the festival must

include overall goals and expectations that will establish the mission statement and create a brand identity. It also includes defining the general scope of the festival for a more detailed perception of the event by, for example, establishing target audiences and ownership details.

Then, stakeholders have to be identified in order to clearly understand their influence and cultural values and to be prepared to meet their expectations. There are internal and external stakeholders to be taken into account. In the initial stages of the festival management, only internal stakeholders will be a part of the process. This includes the team members, the managers, and the festival director. At a later stage, external stakeholders will join, such as sponsors, suppliers, regulating authorities, venue owners, and anyone else who will be involved.

Finally, a management team has to be established to execute upcoming phases of the framework. Team members have to be profiled according to individual strengths and weaknesses in order to be able to assign them roles and functions to carry out expected tasks and activities (Sport Assist). Also, members of the team should be selected according to the extent to which they are able to effectively work together and deliver outcomes.

Planning phase

The planning phase debuts with a kick-off meeting for an initial discussion of the festival's objectives once the event has been determined (Kerzner, 2009). The kick-off meeting can include everyone, from the management team to all stakeholders involved, or it can just include the production team. The decision about who will be involved in this first meeting will depend on the importance given to it by those in charge. Regardless, it is best to after separate team and stakeholder meetings as they call for a different structure and answer to different needs.

Team meetings will begin to establish a list of tasks and activities that need to be carried out and determine a corresponding schedule. The outcome of this step will be a work breakdown structure (Kerzner, 2009).

Then, the festival's program is determined through a list of artists, guests, venues and exhibitors that the team aims to have at the festival. This will be a kind of wish list to follow and work through to book the most possible. Planning for this also implies preparing contracts and accommodation needs for artists and guests.

Secondly, a budget plan is needed to help visualize the festival in financial terms and to identify all possible sources of revenue and cost (Rutherford Silvers, 2003). According to the author of the introduction to an Event Management Book of Knowledge (Rutherford Silvers, 2003), a budget defines the financial resources "according to the priorities and necessities" of the festival so as to help structure its ambitions and expectations. The management team will first decide if it will resort to funding or not and, if so, whether it will call out to sponsors, associations and/or government institutions. Then, revenues will typically result from entrance fees, merchandising and any other additional activities that may take place during the festival. Finally, costs need to be clearly prepared for to avoid budget crisis. Costs will generally include marketing and communications, resources rental or acquisition, salaries, and entertainment.

Thirdly, the festival requires a marketing and communications plan carried out within a determined schedule to acquire and retain customers. Strengths and weaknesses of available media will be assessed according to the needs of the target audience but also according to the ambitions of the festival. A communications plan can also include defining a brand image, promotional events, merchandising distribution, public relations activities, and/or sponsors (Rutherford Silvers, 2007). Note that marketing

expenditures are negatively correlated with size, as smaller festivals seem to spend greater amounts of their budget on marketing than larger festivals since they normally still don't possess the necessary visibility to attract a significant public (Smith et al, 2010).

Finally, an operations plan is essential to coordinate all necessary resources that will produce the festival. The human resources made up of staff and possibly volunteers, along with the material resources and their respective suppliers, require a logistical strategy to work in synch (Rutherford Silvers, 2007).

Stakeholder meetings will gather all involved parties and converge all different requirements into a common goal that will satisfy everyone. Getz et al (2010) draw the attention to the importance of stakeholder influence in the organization of a festival. According to their study, there are certain cultural dimensions that have to be taken into consideration and, where possible, find a compromise.

First, there is the culture of individualism vs. the culture of collectivism where either individual or collective achievements will be valued. This is crucial to determine whether or not stakeholders are willing to pursue collective objectives or if the management team has to give in to each individual objective.

Then, there is the culture of masculinity vs. the culture of femininity, where the first presumably includes "competitiveness, assertiveness, ambition, and the accumulation of wealth and material possessions" while the latter focuses more on "social harmony and quality of life" (Getz et al, 2010). If stakeholders have different values, there is a very high chance that their needs and expectations clash. The same can be said of the culture of long-term orientation vs. the culture of short-term orientation. Some stakeholders

may be more concerned with developing a strategic planning that can possibly be used in future festivals, while others will pay more attention to making a profit.

Finally, and most importantly, there is the culture of power distance that will determine the direction all meetings go. The degree of power each entity holds allows them to control the overall organization of the festival, but there is also, of course, the possibility that all people involved are equal and all decisions are reached democratically.

Implementation phase

Team and stakeholder meetings have a slightly different format from the ones in the previous phase, as their purpose is more of a follow-up routine. Team meetings will be used to monitor progress and to identify potential changes that will need to be made. Stakeholder meetings will inform the involved parties of the development of the project and can be a time to discuss possible deviations and negotiate necessary adaptations if needed. These negotiations can be sparked from the stakeholder side if they are not pleased with the current situation or have decided something needed to be changed in order to fit with their vision, but it can also come from the festival management team who has realized that certain objectives are unrealistic.

The festival phase

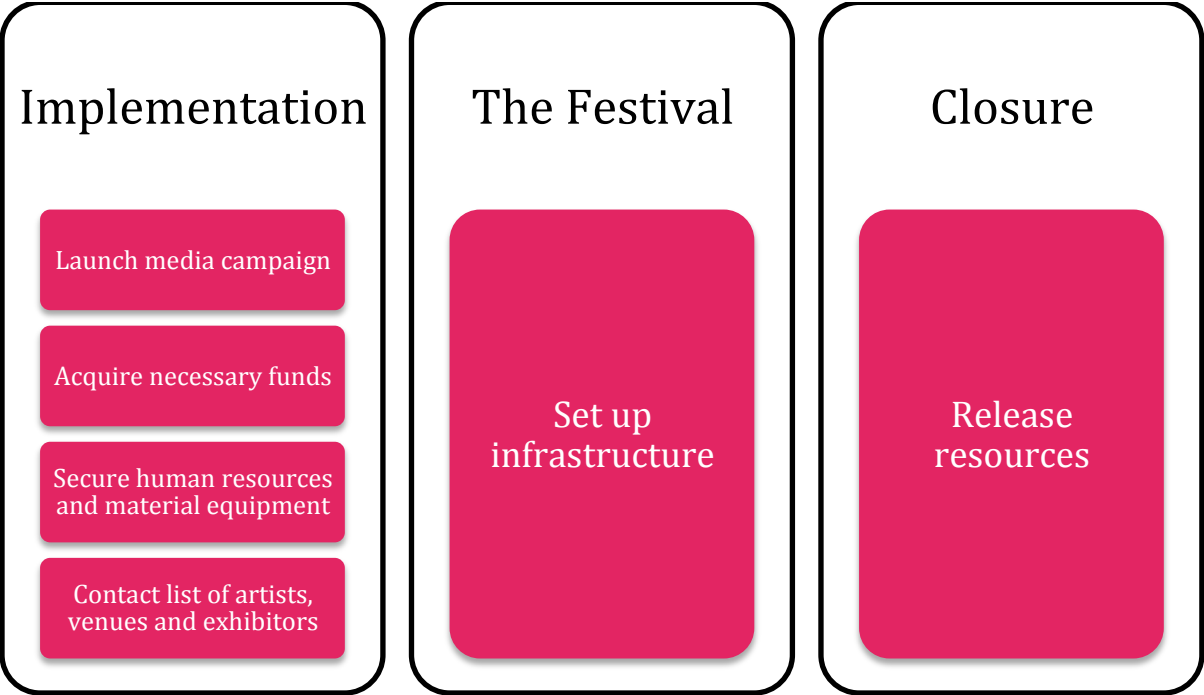
This is when results will show and, for this reason, the management team needs to be alert and closely monitor everything now more than ever. Team meetings are held periodically with precisely this purpose, to have a time where everyone can discuss what has happened so far and, if necessary, discuss potential issues. The number of meetings the team needs to have during the festival depends on its duration. A five or seven-day festival can hold only one meeting halfway through while a month-long festival should have a meeting at least once a week. Of course, the team should always be prepared for emergency meetings if they turn out to be necessary, and can also skip a

meeting if everyone feels that there is nothing to discuss. Stakeholder meetings will be held in the same fashion and whenever requested by any of the parties involved.

Closure phase

A final stakeholder meeting will be held to ensure everything went according to plan and that everyone is satisfied. Team meetings will also take place to validate all completed tasks and prepare data for a final report that can be used each year to present the festival to new partners and any other entity that may be interested in collaborating and being a part of the event in some way.

• **Execution**



Implementation phase

Then, the plans developed in the previous phase will be implemented. For the marketing and communications plan, the media campaign will finally be launched, starting with a press conference and followed by all the planned publicity. Also, it is in this phase that acquiring all necessary resources for the festival begins. Securing these resources resorts to the operations and budget plan to secure the necessary funds, through the

means they have formerly agreed upon, as well as the human resources (staff and volunteers) and material equipment. It also involves the festival program in order to contact the previously established wish list of artists, venues and exhibitors and begin establishing contracts.

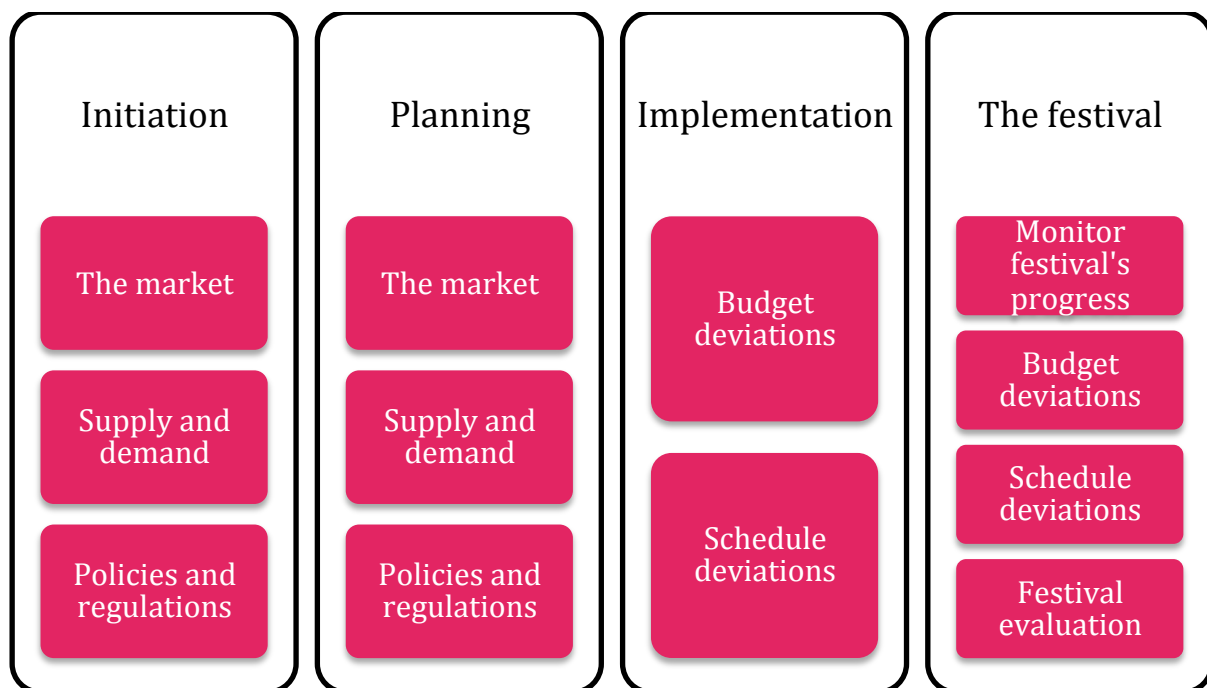
The Festival phase

Depending on the size of the festival, usually a day or two of setting up is enough. Film festivals tend to be faster as their sites are already in place, while outdoor events, for example music or sports festivals, may require more elaborate work depending on their size.

Closure phase

This is the final step. All resources will be released, be it staff or material, and all final payments made. Dismantling all set-up infrastructure is usually done on the following day and take no longer than that. An exception will usually be within music festivals with camping sites that need to allow for the public to clear their tents and equipment first, so an extra disassembly day might be needed. Payments will also be made in the following days to uphold the festival's reputation by avoiding delays and/or oversights. Here, all the information gathered by the monitoring and controlling activities held throughout all the phases of the framework will be used to write down the final report, a yearly document that is a retrospective of the current festival edition.

- **Monitor and control**



Initiation phase

People involved in the initiation phase need to already control and be aware of possible barriers and constraints when developing the festival (Getz et al, 2010). These limitations include the market in which the festival wants to insert itself. Organizers have to be aware of existing supply and demand in order to be able to respond to consumer needs and arouse interest. They also have to take into account existing policies and regulations that cannot be infringed and need to be known so as to evaluate what can and cannot be done.

Planning phase

Again, the same barriers and constraints from the previous phase will come into play to monitor and control that all the plans comply to potential restrictions and specific conditions.

Implementation phase

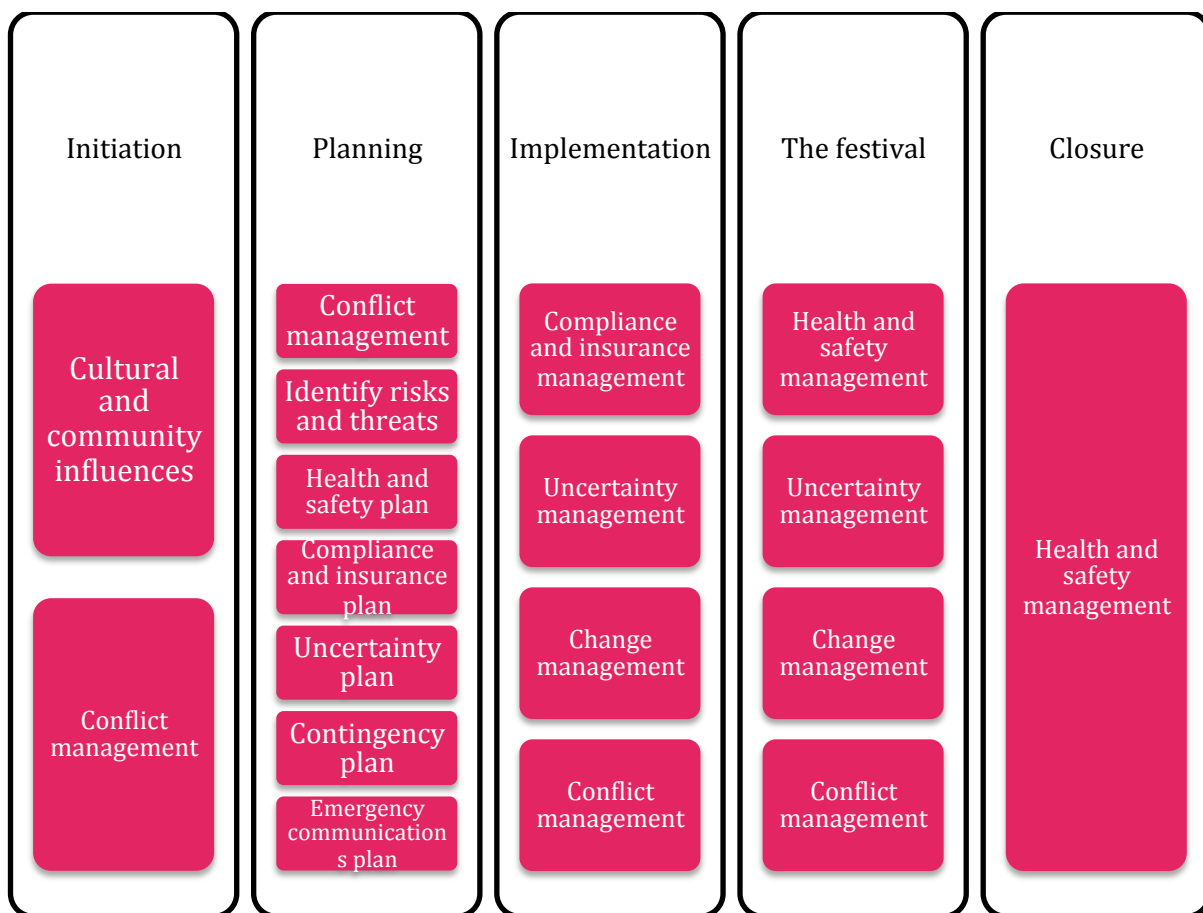
All these steps require a strict monitoring and controlling activity, as it is generally at this point that the most significant delays and deviations can occur. Most notably are

budget and schedule modifications that the management team has to be prepared to deal with.

The festival phase

Controlling and monitoring is the most important activity in this phase. The festival's progress will be supervised and, once again, budget and schedule deviations must be attended to, as they can still occur. A festival evaluation should also be conducted while it's ongoing. As events, and festivals in particular, tend to have a very strong cultural and social connotation it is important to measure its impact on the community (Getz et al, 2010). There are several impacts that can be evaluated: personal impacts looking at users' individual experiences; societal and political impacts on the community; cultural impacts that can be related to creativity or innovation; economic impacts; and environmental impacts. The idea is to evaluate the overall effectiveness and efficiency of the festival through quality management, and determining whether the intended outcomes have been reached and if unintended outcomes have occurred.

• Risk management



Initiation phase

Right from the beginning, the festival already has to implement a simple form of risk management to deal with cultural and community influences (Getz et al, 2010). Indeed, since festivals take place in public places, there are usually several entities that need to be considered in addition to the general law. These entities can include associations, government institutions, or even the neighborhood habitants, that may have to be considered even if just to secure authorizations or general acceptance from those affected by the festival. Those involved in the development of the festival need to be prepared to manage possible conflicts that may be external, as previously detailed, but can also be internal. Already in this conception phase disagreements can occur that, if not properly dealt with, can create considerable delays or even immediately terminate the project if irreconcilable.

Planning phase

With such extensive discussions and planning underway, this phase also needs to be prepared to manage possible conflicts as the team and the number of people involved grow. Also, a more broad and detailed risk management plan will be established to ensure a smooth running during the upcoming phases. Start by identifying all potential risks and threats that may occur. With such a list, the organization team will clearly acknowledge the type of situations it needs to be prepared for. Very broadly, risks and threats usually include health and safety issues, compliance and insurance issues, and possible conflicts that may occur during the preparation and implementation of the festival (Rutherford Silvers, 2007).

For these possible situations, it is crucial to be prepared with a contingency plan to implement change and take corrective actions whenever necessary. On top of this, festivals also need to consider uncertainty management due to their more volatile nature (Ellert et al, 2015). Unpredictable occurrences are common and yet are often neglected due to their uncertain and unexpected characteristics. However, a festival's planning will gain from anticipating them as much as possible and from preparing contingency plans in order to be more flexible and adapt to any situation. Normally, especially in project management, the company should test how to deal with these identified emergencies to see if the plan is viable. Nevertheless, for a festival this is hard to do, as the required infrastructure is only going to be set up once the festival actually takes place and not before. There are some things that can be tried and prepared, for example back up lights and sound, but for specific situations it is very hard to do. For festival management, it would be instead recommended to apply the "trial and error" method and perfect the plan with each new edition.

Directly related to the risk management plan is an emergency communications plan. This communication plan is not part of the marketing and promotion operations of a festival; it is a set of previously developed announcements that can be used in emergency situations. Every festival organizer hopes that this will never be used, but it is nevertheless essential to have it prepared to avoid any bad publicity. In these particular situations it is essential to do damage control and avoid a crisis. For this, communication is key. First, only the truth and confirmed facts should be shared; avoid speculations as it can eventually turn against you. Then, always make sure the three fundamental questions are answered: What happened? Why? What is being done? Finally, remain calm and demonstrate commitment to solving the problem, as it will place the entity at the same level as the people directly affected by the emergency situation (Vidal, 2016).

For all this to run as smoothly as possible the communication channels have to be thoroughly considered and the information centralized. For festivals, it is best to stick to the event's usual communication channels (festival website and social media). However, in the more extreme situations, it is also advisable to have a press release prepared, as media coverage is inevitable.

Implementation phase

The risk management plan will also be fully executed, focusing on compliance and insurance management. The team needs to acquire all necessary authorizations and insurance to make sure the event complies with laws and regulations, and to avoid possible threats of seeing the festival shut down. Additionally, uncertainty and change management are also essential in this phase. Not only can expected deviations happen, but also unpredictable situations. It's here that previously planned corrective actions can come in handy to steer the project in the right direction once again. Once these

changes are implemented, it is important to not forget to update documentation and adjust goals wherever relevant. For example, if management needs to postpone the press conference, it is advised to update the schedule accordingly.

The festival phase

The festival phase sees the event finally taking place. But before actually opening the festival's doors it is necessary to prepare the site or venues and set up the required infrastructure to have everything in place. Already in this initial step, risk management will be in motion to assure the health and safety of the workers, but it will also be applied once the festival is on for all the guests and the audience. Furthermore, to avoid potential conflicts and uncertainties, the risk plan will allow the team to be ready to make necessary changes and take corrective actions if needed.

Closure phase

Health and safety management has to be applied during the dismantling of the infrastructures in the exact same way as it is during its set up.

Appendix 3 – Framework execution within MOTELX

Initiation phase

The initiation process becomes a very quick procedure as a festival grows throughout the years.

It only becomes relevant once again if the organization wants to rebrand itself or go in a new direction.

MOTELX has been in Lisbon's festival market for 10 years and therefore doesn't currently need to go over the initiation phase as thoroughly as a beginner would. The profile of the festival is clearly established by now and, unless market characteristics change or new regulations are made, it is continuously dealing with the same constraints and cultural influences. Situations may differ if a festival is looking to rebrand itself or to go in a new direction; then it has to review everything from the beginning.

Nevertheless, each year it still needs some time to go over the management team as employees are on constant rotation. One of the market's characteristics is that festival workers are rarely committed to one festival at a time, so there may come a day when someone is not available to work on MOTELX's desired time period. It is safe to say that within the festival's team only one of the founders, Pedro Souto, works full time and is entirely dedicated to MOTELX's development. The other co-founders include João Monteiro, Carlos Pontes, and João Viana who also supervise part-time the festival's progress. In 2016, we can add to the management team head of production Julita Santos, executive producer Patrícia Santos, print traffic manager Maria João Teixeira, Luís Mata Henriques, Nuria Leon Bernardo and Luís Canau in programming, and three production interns, André Menezes, Rita Fonseca, and myself.

Finally, regarding the stakeholders, 2016 also demanded a revision. Just as the management team, it cannot be expected for stakeholders to remain the same year after year. Luckily, MOTELX has been able to rely on some long-time partners, such as the Cinema São Jorge, where the festival takes place, and the support from Grupo Multipessoal, Hotéis Real, and Belver Hotels, who have been present since the beginning in 2007. However, sponsors have come and gone over the years, and 2016 was no different. Their previous main sponsor, Mini, backed out after a two-year partnership and the management team had to begin its 10th edition by searching for a new one. In the end, Yorn, a Portuguese telecommunication brand belonging to Vodafone present in MOTELX since 2013, stepped up.

Planning phase

The planning phase is highly based on previous editions.

Novelties for 2016 included the strengthening of the children's and formation program, as well as the introduction of a risk management plan.

A kick-off meeting was held March 15th, slightly earlier than expected, as the directors wanted to anticipate some aspects of the festival. Indeed, the 10th year anniversary marks a milestone that the founders planned to celebrate by expanding their event. The idea was to always keep cinema at the forefront of MOTELX, but to further invest in the two side-activities that are the children's program and the workshop and masterclasses formation program. In order to do this, the festival needed to engage several local schools, but also international institutions, to build a more robust program for each one of these activities, and to prepare it more in advance. In this perspective, the planning phase began by brainstorming ideas to propose a new and improved program, instead of repeating the previous format, over the course of several team meetings.

Developing the program slowly began at this point with just a few members of the management team, but continued well throughout the implementation phase with a more complete team. The program is the most arduous task of this event. A list of desired movies to screen (which count as the list of artists in the framework for a cinema festival), of guests to invite, of venues and exhibitors to showcase was made in advance, but this constantly had to be updated as the securing resources activity takes place during the implementation phase. The program developed in the planning phase is rarely going to be the final program, as a lot of the wanted movies or invited guests don't necessarily come through. For this reason, this task is never truly over until all resources are confirmed and all time slots filled.

At the same time however, the rest of the planning takes place. The budget plan is always defined based on previous years, but every year with the intent to cut costs. The idea that this was to be a special year in the festival's history, made the planning for the 2016 edition slightly different as extra costs were automatically assumed for celebratory events that wouldn't have happened otherwise. So, a 10-year anniversary party, a special celebration on opening night, or new merchandise marking MOTELX's first decade were predicted in the budget as extra costs, but price reductions were desired in everything else. Budgeting is an essential activity within MOTELX as the festival only manages to break-even at the end of each edition. To achieve this, the management team seeks partnerships and financial aids of any sort, such as preferential prices or special offers, with companies it has to work with.

The marketing and communications plan is also taken from the previous editions, as the same media channels are continually used. MOTELX focuses on their Facebook page to advertise along the year what is being done and to divulge new content. The production

team also plans for street advertising (posters and flyers) to launch in the beginning of July, and updates the festival's website with relevant news about the program. The main stakeholders have usually already been identified by this stage to ensure that the budget will be able to cover all expenses, but all other sponsors, as well as additional partners that can contribute in any way, will be thought of during the planning phase according to the specific needs. These include print shops for all merchandise and graphic material, but also all exhibitors, such as an ice cream parlor to offer its product during the peak hours of the festival or other shops that want to sell their goods along with MOTELX's official merchandise.

Then, the operations plan deals with all resources. The human resources include the production team, the communications team, the print traffic team, the design team, and the volunteers. As previously explained (cf. Initiation phase), a lot of them are already present since the beginning and most also come back year after year. This specific part only needs to be revised if an employee decides to not come back and the directors of the festival need to find someone to replace them. The material resources and suppliers remain the same when it comes to the venues, as the relationship has been continuously renewed and a lot of the equipment is provided by and coordinated directly with them. However, all other materials are thought through each year to see if better prices can be arranged or if some things can be dropped to reduce costs.

Finally, a proper risk management plan was the novelty in this edition. After talking with the festival's employees and, especially with the festival's directors, a list of risks and threats was made and contingency plans identified. This is not to say that MOTELX didn't put into place some type of risk management already, simply this time it was planned in advance and put down into writing, leaving less chances for improvisation

and panic should an emergency situation occur. Unfortunately, the usual method of improvisation was preferred to deal with risks and the developed plan was forgotten.

Implementation phase

The implementation phase began too late. Given the fact that a lot of the planning is recovered from previous years, the organization should be able to start putting things into motion much earlier in order to avoid constant refusals to cooperate due to last minute requests – a problem that not only causes schedule delays but also results in increased costs.

In the realm of festival management, the implementation phase will always overlap with the planning phase (see GANTT chart in Appendix 9). The process begins with what is the essence behind any project or event – the resources. This is the time to set in stone what was done in the planning phase regarding funds, staff, equipment, artists, guests, venues, and exhibitors.

In MOTELX this meant keeping close negotiations with sponsors, government institutions, and associations to close deals. Even longtime partners have to be revisited each year and a new contract is established, with alterations or not in comparison with the previous edition. The festival's 10th edition counted with several types of supports, from government institutions such as Lisbon's Town hall and EGEAC, to more specific and strategic partnerships such as Mý !ced, a yoghurt ice-cream shop that provided its products to the audience throughout the whole festival, or Sabotage Rock Club that opened its doors for a party during the Warm-Up days (see Appendix 10 for a complete list).

However, these partnerships have to be established very early, much earlier than initially anticipated, especially when trying to gather new monetary resources. In MOTELX, this was implemented too late – while trying to contact several embassies to support their national cinematography screening at the festival, the organization met

with negative responses time after time due to the entities' budgets already being closed for the current year.

The staff is reinforced throughout this phase, with the full team being present during the summer months and the addition of volunteers during the festival days. Then, the heart of the festival, the artists, had to be invited. For a film festival, it means the movies themselves and acquiring the rights to screen them to an audience. A long process that can be carried out until the very last minute when negotiations get tough, but that should ideally be closed once the communication of the festival's program begins. These negotiations often also include the invitation of guests: directors, actors, or producers of the movies being screened. This year, the guests of honor were Mick Garris, MOTELX's very first guest in 2007 that came back for the 10th year anniversary, and Ruggero Deodato, one of the most controversial figures in cinema since his movie "Cannibal Holocaust" came out in 1980.

Finally, the venues also saw some novelties in 2016, with the addition of Teatro Tivoli BBVA as a screening room together with Cinema São Jorge and Cinemateca Júnior for the children's section, but also Odd School, a school for digital entertainment, where two workshops were held. The exhibitors in MOTELX, as in any film festival, are quite few. It will usually include the cinema bar where the movies are being screened and, occasionally, something extra for food and merchandising. MOTELX usually only plans for its daily offer of ice-cream and its merchandising stand that is run by volunteers, where they sell t-shirts, pins, cloth bags, books, and DVDs. This year, merchandising expanded with four stores joining the official festival merchandise to sell horror-themed products.

During the implementation phase, the marketing and communications plan is launched. Some teasers are prepared to give people a preview of what is to come – movies and guests that are confirmed, events, and promotional videos – in preparation of the press conference, where a part of the program is revealed. MOTELX opted to slowly reveal in its social media selected news concerning the program and conceal other things to only disclose during the press conference and create a buzz with the media coverage. The implementation of the marketing and communications plan also supposes the graphic design of several promotional pieces. In fact, from this point on, a graphic designer is going to be an essential part of the staff. MOTELX seemed to neglect this detail again, and had to constantly rely on external people and freelancers to do the work. Not having someone *in loco* to do these things and be able to apply changes and make several trials in the moment complicates and, more importantly, delays everything, making the task of handing in material on time nearly impossible.

At this phase, compliance and insurance management is crucial. In order to be able to make everything happen, including the press conference, all necessary authorizations have to be acquired, such as to be able to switch off street lighting during the open air screenings, to have publicity at the venues, or even just the authorizations to screen the movies in front of an audience. Insurance is also crucial for the festival, not only in terms of office equipment and the festival's material, but also for all third parties, which provide any type of gear or space for the festival to take place. All this has to be in order before the festival begins.

Finally, the activity of monitoring and controlling reaches its peak in this phase. Schedule deviations are the hardest to avoid. With MOTELX, it quickly became clear that the schedule is something that has to be set in stone when prepared in the planning

phase. It must be a key document throughout the whole preparation of the festival in order to keep things organized and not lose track. A work breakdown structure with everything detailed and the according deadlines was made but everything was often delayed due to a lack of attention and organization. As a lesson learned, it is vital that this becomes a staple in the festival's organization, something that is consulted and monitored daily, with the help of more frequent PMO's to avoid overlooking any aspect. Nevertheless, note that schedule deviations, just as budget deviations, will always occur, even if just due to unpredictable circumstances that are out of anyone's control. A written document is a way to minimize the damage.

Regarding the budget, it's also essential to have a robust source of funding to cover these variable costs, or the organization runs the risk of quickly going overboard. It's no surprise that this should be the one of the most important parts of the festival, but even the most organized budget cannot stand the repercussions of bad planning that doesn't come up with the expected funds. This is exactly what happened when MOTELX applied for monetary support or cooperation and found it very hard to obtain extra help at such late notice, subsequently having to renounce previously planned material to not go overboard.

This is where uncertainty management comes into play, which also needs to include the insecurities related to resources, be they what they may. Equipment expected to be delivered may never come, a promised material may suddenly not be available, a sponsor or partner may back out. This is complemented, and taken care of in the best way possible, with change management and contingency plans. Often, goals have to be revisited, and documentation updated accordingly, to adjust to these situations. For

example, while initially wanting to do billboards for all planned events, MOTELX had to reconsider and choose which billboards would actually be produced due to budget cuts.

Festival phase

The lack of implementation of the risk management plan resulted in some technical problems not being dealt with properly.

Faulty print copies, for example, were dealt with on the moment while the movie was screening or just before, causing delays.

The festival phase began 1st of September, the first day of the Warm-Up. The two days of Warm-Up (1st and 3rd of September) were made up of open-air cinema screenings, concerts and parties. It began with setting up the necessary infrastructure for such events – big screen, chairs, promotional material (roll-ups, programs, flyers), switching off streetlights, and getting all the necessary authorizations to be able to put this into motion. The set up for the six days of the festival is simpler, as the infrastructure is permanent at the Cinema São Jorge. A single day of preparation is enough to set up the venue with all promotional material provided by MOTELX but also by some main sponsors who have brand activation activities.

Once that is done and the festival is up and running, the production and directing teams have to be the most vigilant during the days of the festival to control any problems that may occur unexpectedly and be ready to adjust to them. For MOTELX, this meant having the team in place from beginning to end to control and monitor the screenings, the workshops and masterclasses, the Q&As, the guests, the volunteers, and just the general day-to-day functions of the venue. However, some issues still occurred that caused trouble. Because risk management and the according contingency plan weren't put into motion, many movies were screened without being tested due to lack of time, resulting in the audience watching an unfinished copy of the movie or having to wait an hour and a half before the movie was ready to play.

This is the most essential phase of the framework in terms of festival evaluation by the audience, so everyone has to be on their guard. It is now that the effectiveness and efficiency of the planning process is put to the test. Problems are very likely to occur and an intervention team has to be ready to take action at any moment. Despite an established risk management plan, it was not really fully put into practice. More importantly, risk and threats were not planned with enough anticipation – as events tend to be very chaotic in nature, problems are dealt with in the moment the best way they can with the means available at the time, many times putting the quality of the festival in jeopardy.

MOTELX conducts a survey each year during the six days of the festival to measure personal impacts and assess the type of audience they have. The survey tries to understand the amount of new public it acquires with each edition in comparison with the audience that comes back each year, but also their opinion concerning the communication, program and general organization of the festival. With this, it is able to know the demographics of their target audience and how they are reacting to the event. More than a survey, it is also a place for spectators to write down their opinions and complaints.

Closure phase

It was in hindsight that many problems were finally discussed, when they could've been dealt with straight away with more regular PMO meetings and a more organized implementation phase.

Closing the festival begins immediately after the last day of the festival. All the promotional material at the cinema is taken down, the last guests are leaving and most of the staff will be released. The following days, usually going until the end of the month, are spent making final payments, returning all remaining print copies, and preparing the

final report. This is the time for the last team meetings to review and debrief yet another edition of MOTELX. Dos and don'ts are discussed and lessons learned established to move on to the following year.

The many problems of this year's edition were finally considered and meetings were had with the concerning people to try to understand where it went wrong. The outcome of these deliberations was a festival guide that lists rules and important tasks to not neglect that is meant to be followed rigorously from now on.

Appendix 4 – Festival work-breakdown structure

	Task Name	Start Date	End Date	Duration
1	Initiation	02/29/16	03/25/16	20d
2	<i>Profile of the festival</i>	02/29/16	03/18/16	15d
3	Overall goals and expectations	02/29/16	03/18/16	15d
4	General Scope	02/29/16	03/18/16	15d
5	<i>Identify stakeholders</i>	03/21/16	03/25/16	5d
6	<i>Establish management team</i>	03/21/16	03/25/16	5d
7	Assign roles and functions	03/21/16	03/25/16	5d
8	Plan schedule of tasks and activities	03/21/16	03/25/16	5d
9	<i>Control barriers and constraints</i>	02/29/16	03/25/16	20d
10	Market characteristics	02/29/16	03/25/16	20d
11	Policies and regulations	02/29/16	03/25/16	20d
12	Laws	02/29/16	03/25/16	20d
13	<i>Manage cultural and community influences</i>	02/29/16	03/25/16	20d
14	Government institutions	02/29/16	03/25/16	20d
15	Neighborhood	02/29/16	03/25/16	20d
16	<i>Manage conflicts</i>	02/29/16	03/25/16	20d
17				
18	Festival planning	03/28/16	08/19/16	105d
19	<i>Kick-off meeting</i>	03/28/16	03/28/16	1d
20	Festival objectives	03/28/16	03/28/16	1d
21	<i>Team meetings</i>	03/29/16	04/08/16	9d
22	Establish list of tasks and activities	03/29/16	04/08/16	9d
23	Determine schedule	03/29/16	04/08/16	9d
24	<i>Stakeholder meetings</i>	04/11/16	04/15/16	5d
25	<i>Develop program</i>	04/18/16	08/19/16	90d
26	List of artists	04/18/16	07/15/16	65d
27	List of guests	04/18/16	07/15/16	65d
28	List of venues	04/18/16	07/15/16	65d
29	List of exhibitors	04/18/16	07/15/16	65d
30	Prepare contracts	04/18/16	07/15/16	65d
31	Prepare accomodation	06/20/16	08/19/16	45d
32	<i>Define budget plan</i>	04/18/16	04/29/16	10d
33	Identify sources of revenue	04/18/16	04/29/16	10d
34	Identify costs	04/18/16	04/29/16	10d
35	<i>Define marketing and communications plan</i>	04/18/16	06/30/16	54d
36	Determine media	04/18/16	05/13/16	20d
37	Identify sponsors	04/18/16	06/30/16	54d
38	Determine schedule	04/18/16	05/13/16	20d
39	<i>Define operations plan</i>	04/18/16	07/29/16	75d
40	Identify human resources	04/18/16	04/22/16	5d
41	Identify material resources	04/18/16	07/29/16	75d

	Task Name	Start Date	End Date	Duration
42	Identify suppliers	04/18/16	07/29/16	75d
43	<input type="checkbox"/> <i>Define risk management plan</i>	04/18/16	06/03/16	35d
44	Identify risks and threats	04/18/16	06/03/16	35d
45	Prepare conflict management	04/18/16	06/03/16	35d
46	Prepare health and safety management	04/18/16	06/03/16	35d
47	Prepare compliance and insurance management	04/18/16	06/03/16	35d
48	Prepare contingency plans	04/18/16	06/03/16	35d
49	Prepare emergency communication plan	04/18/16	06/03/16	35d
50	Prepare uncertainty management	04/18/16	06/03/16	35d
51	<i>Control barriers and constraints</i>	04/18/16	08/19/16	90d
52				
53	<input type="checkbox"/> Implementation	05/02/16	09/02/16	90d
54	<input type="checkbox"/> <i>Team meetings</i>	05/02/16	09/02/16	90d
55	Monitor progress	05/02/16	09/02/16	90d
56	Identify potential changes	05/02/16	09/02/16	90d
57	<input type="checkbox"/> <i>Stakeholder meetings</i>	05/02/16	09/02/16	90d
58	Update parties involved	05/02/16	09/02/16	90d
59	Discuss possible deviations	05/02/16	09/02/16	90d
60	Negotiate adaptations	05/02/16	09/02/16	90d
61	<input type="checkbox"/> <i>Secure resources</i>	05/02/16	08/31/16	88d
62	<input type="checkbox"/> Funds	05/02/16	07/15/16	55d
63	Sponsors	05/02/16	07/15/16	55d
64	Government institutions	05/02/16	07/15/16	55d
65	Associations	05/02/16	07/15/16	55d
66	<input type="checkbox"/> Staff	05/02/16	08/19/16	80d
67	Employees	05/02/16	05/27/16	20d
68	Volunteers	08/01/16	08/19/16	15d
69	Equipment	07/04/16	08/31/16	43d
70	Artists	05/02/16	07/15/16	55d
71	Guests	05/02/16	07/15/16	55d
72	Venues	05/02/16	07/15/16	55d
73	Exhibitors	05/02/16	08/12/16	75d
74	<input type="checkbox"/> <i>Launch marketing and communications plan</i>	05/02/16	07/19/16	57d
75	Hold a press conference	07/19/16	07/19/16	1d
76	Launch publicity	05/02/16	05/02/16	1d
77	<input type="checkbox"/> <i>Monitor and control</i>	05/02/16	09/02/16	90d
78	Schedule deviations	05/02/16	09/02/16	90d
79	Budget deviations	05/02/16	09/02/16	90d
80	<input type="checkbox"/> <i>Compliance and insurance management</i>	05/02/16	09/02/16	90d
81	Acquire necessary authorisations and insurance	05/02/16	09/02/16	90d
82	<i>Uncertainty management</i>	05/02/16	09/02/16	90d

	Task Name	Start Date	End Date	Duration
83	<input type="checkbox"/> <i>Change management</i>	05/02/16	09/02/16	90d
84	Update festival documentation	05/02/16	09/02/16	90d
85	Adjust goals	05/02/16	09/02/16	90d
86	<i>Conflict management</i>	05/02/16	09/02/16	90d
87				
88	<input type="checkbox"/> The festival	09/02/16	09/12/16	7d
89	<input type="checkbox"/> <i>Prepare site and venues</i>	09/02/16	09/02/16	1d
90	Set up infrastructure	09/02/16	09/02/16	1d
91	<input type="checkbox"/> <i>Team meetings</i>	09/02/16	09/12/16	7d
92	Control and monitor	09/02/16	09/12/16	7d
93	<input type="checkbox"/> <i>Stakeholder meetings</i>	09/02/16	09/12/16	7d
94	Control and monitor	09/02/16	09/12/16	7d
95	<input type="checkbox"/> <i>Monitor progress</i>	09/02/16	09/12/16	7d
96	Schedule deviations	09/02/16	09/12/16	7d
97	Budget deviations	09/02/16	09/12/16	7d
98	<input type="checkbox"/> <i>Evaluate festival</i>	09/02/16	09/12/16	7d
99	Effectiveness and efficiency	09/02/16	09/12/16	7d
100	Quality management	09/02/16	09/12/16	7d
101	<input type="checkbox"/> <i>Measure impact</i>	09/02/16	09/12/16	7d
102	Personal impacts	09/02/16	09/12/16	7d
103	Societal and political impacts	09/02/16	09/12/16	7d
104	Cultural impacts	09/02/16	09/12/16	7d
105	Economic impacts	09/02/16	09/12/16	7d
106	Environmental impacts	09/02/16	09/12/16	7d
107	<i>Conflict management</i>	09/02/16	09/12/16	7d
108	<i>Health and safety management</i>	09/02/16	09/12/16	7d
109	<i>Uncertainty management</i>	09/02/16	09/12/16	7d
110	<input type="checkbox"/> <i>Change management</i>	09/02/16	09/12/16	7d
111	Update festival documentation	09/02/16	09/12/16	7d
112	Adjust goals	09/02/16	09/12/16	7d
113				
114	<input type="checkbox"/> Closure	09/12/16	09/30/16	15d
115	<input type="checkbox"/> <i>Release resources</i>	09/12/16	09/12/16	1d
116	Staff	09/12/16	09/12/16	1d
117	Equipment	09/12/16	09/12/16	1d
118	Make final payments	09/12/16	09/12/16	1d
119	<input type="checkbox"/> <i>Team meeting</i>	09/12/16	09/30/16	15d
120	Validate completed tasks	09/12/16	09/16/16	5d
121	Festival report	09/19/16	09/30/16	10d

Appendix 5 – Risk management plan

Threat / Issue / Hazard	Risk Rating	Risk Control Measures	By who and when	How will it be monitored	Notes
One (or more) of the guests cancel last minute	High	<p>Have planned activities to fill up empty slots that were supposed to be covered by cancelled guests</p> <p>Have a list of easily to contact and ready to participate people</p>	Management and production teams should establish these back-up plans up until a week prior to the festival	Management team will discuss contingency plans with production team	
Children at the festival get lost	Medium	<p>Ensure staff and volunteers are briefed on where to take a lost child</p> <p>Have an announcement system in place for advising parents of lost child</p>	Management and production teams have to complete announcement system one week prior to the festival and brief staff on the day before the festival begins	<p>Ask people to keep an eye during the festival</p> <p>Have staff carry mobile phones and wear easily identifiable badges or t-shirts</p>	
<p>Extreme weather conditions</p> <ul style="list-style-type: none"> • Rain • Extreme winds • Storms cause blackouts 	Low	<p>Prepare protection for outdoor activities</p> <p>Consider the possibility of having indoor space to be able to move outdoor activities</p> <p>Make sure the festival site is safe to handle inclement weather</p> <p>Have backup power source</p>	Production team should start monitoring weather a week before the beginning of the festival	Production team will continue auditing during festival	
<p>Manual handling of material</p> <ul style="list-style-type: none"> • Physical injury caused • Damage to equipment if dropped 	Medium	<p>Ensure enough people are ready and helping to avoid accidents</p> <p>Have lifting trolley on site if possible</p>	Management and production teams will be present when the infrastructure is being set up	Production team will advise installers of requirements	
<p>Third parties</p> <ul style="list-style-type: none"> • Food vendors have bad food and/or specific orders (e.g. vegetarian) 	Low	Ensure third party companies also provide insurance coverage and that they are indemnifying the	Production team has to make sure third parties are aware of the festival's	Production team will monitor these activities during the event to ensure everything is	Management team must make sure insurance coverage is stipulated in the contracts established with

<p>meals) never arrive</p> <ul style="list-style-type: none"> • Drinks vendors run out of stock • Security staff doesn't have the proper training • Light and sound companies deliver faulty equipment • Insurance and authorizations don't come through 		<p>festival</p> <p>Anticipate insurance and authorization demands</p>	<p>dimension when establishing contracts</p>	<p>going according to plan</p>	<p>third parties</p> <p>Be aware of the trickle down damage effect when several products from different companies are interacting</p>
<p>Staff and volunteers</p> <ul style="list-style-type: none"> • On-duty injuries occur 	Medium	<p>Establish a workers compensation policy</p> <p>Provide adequate safety measures to avoid incidents</p>	<p>Management team has to establish policy from the very beginning to be able to include in the contracts signed with staff</p>	<p>Production team will monitor safety measures are in place from the implementation phase to the closure phase</p>	<p>Although a contract may not specifically be established with volunteers, a note about this should appear on their guidebook</p>
<p>Health and safety</p> <ul style="list-style-type: none"> • Accidents • Fires • Someone feels ill • Vehicles circulating around the festival site injure someone 	Low	<p>Ensure adequate personnel is on grounds to handle health and safety issues</p>	<p>Management team has to complete health and safety plan two weeks prior to the festival</p>	<p>Production team will be attentive to potential accidents throughout the whole festival</p>	
<p>Material transportation</p> <ul style="list-style-type: none"> • Delays occur • Material gets damaged 	Medium	<p>Provide strict protocol to transportation team to ensure deadlines are respected</p> <p>Ensure appropriate protection is being applied to more fragile material</p>	<p>Production team will stay on top of it when any hauling is planned</p>	<p>Production team will work closely with the transportation team throughout the festival</p>	
<p>Accommodation</p> <ul style="list-style-type: none"> • Guests have specific, difficult to meet requests • Hotels are fully booked 	Low	<p>Ask all guests for any valuable information that will influence the choice of accommodation beforehand</p>	<p>Management and production teams need to contact guests regarding this at least eight weeks prior to the festival</p>	<p>Production team will send out forms to gather all guests' requests</p>	<p>Preferential rates can be negotiated with certain places of accommodation when big reservations are made</p>
<p>Logistics</p> <ul style="list-style-type: none"> • Infrastructure collapses • Equipment (e.g. sound and lighting) fails • Emergency evacuation • Print copies may 	Medium	<p>Have backup equipment and material in case something fails</p> <p>Prepare security measures in case of dangerous accidents</p>	<p>Production team should deal with all logistics at least five weeks prior to the festival</p>	<p>Production team will follow lists of which and how much material they should have available for backup and closely monitor staff to see if</p>	<p>The earlier this is dealt with, the more time there is to provide backup in case something goes wrong</p> <p>Nevertheless, note</p>

<p>be faulty</p> <ul style="list-style-type: none"> • Deliveries never arrive 		<p>and need to evacuate</p> <p>Perform screen tests to review film copies</p> <p>Prepare to screen other films or cancel screening</p>		<p>appropriate safety measures are practiced</p>	<p>that in case of failed deliveries, a contingency plan has to be dealt with on the spot</p>
<p>Festival cancellation due to extreme conditions</p>	<p>High</p>	<p>Have a festival cancellation insurance to cover expenses and profits</p>	<p>Management team will prepare cancellation insurance at least four weeks prior</p>	<p>Production team will constantly monitor possible conditions that lead to festival cancellation</p>	<p>Management team will make sure it's aware of the necessary requirements to obtain such an insurance</p>

Appendix 6 – Emergency communications plan

Emergency	Communication
Guest cancellation	Announce cancellation through social media. Prepare a statement as to why the guest is no longer coming and what is being done to repair this issue – will he/she be replaced? And by who? Apologize for the inconvenience and set up a compensation scheme (refund people who specifically bought a ticket for this guest, offer food and drink vouchers or a free entry to one of the festival’s activities, etc.).
Movie delay/cancellation	Announce delay or cancellation through social media or in the moment should the problem occur during the festival. Prepare a statement to explain what the problem was and what is being done to remedy the situation – will another movie be screened instead? Will the movie be screened at another time? Will tickets be reimbursed? Apologize for the inconvenience.
Lost child	Keep this an internal matter. Make sure a safe meeting point where the child can contact staff and safely wait for his or her parents is visible.
Physical injury	Prepare to explain accident and assume responsibility, if that is the case. Apologize for the damage.
Disruptive weather	Announce predicted weather conditions through social media. Explain what is expected from the audience, specifically if it should reach an extreme level, to avoid panic and potential accidents.
Damaged material	Prepare to explain accident and assume responsibility, if that is the case. Apologize for the damage.
Food poisoning	Prepare to explain accident and assume responsibility, if that is the case. Apologize for the damage.
Wrong orders	Prepare to explain accident and assume responsibility, if that is the case. Apologize for the inconvenience.

Missing orders	Prepare to explain accident and assume responsibility, if that is the case. Apologize for the inconvenience.
Delays	Prepare to explain accident and assume responsibility, if that is the case. Apologize for the inconvenience.
Run out of stock	Prepare to explain accident and assume responsibility, if that is the case. Apologize for the inconvenience.
Missing insurance or authorization	Apologize for any disruptions to the festival due to the lack of a specific insurance or authorization. Make sure everything is being done to repair the situation.
On site staff fails to meet expectations	Apologize for staff behavior. Explicit punishment measures that have been taken.
Fire	Prepare to explain accident and assume responsibility, if that is the case. Apologize for the damage.
Emergency evacuation	Announce situation through any means available on site (use staff members, televisions or microphones available). Clearly state where the audience should head to and what is expected of them.
Festival cancellation	Announce cancellation through social media. Prepare a statement to explain cancellation and what was done to try to prevent it. Apologize for the inconvenience and set up a compensation scheme (refund people with tickets, offer food and drink vouchers or a free entry to for next year's edition, etc.).

Appendix 7 – Survey



Este questionário é anónimo e foi elaborado para poder ser respondido em menos de 5 minutos. Tem por objectivo melhor conhecer as preferências do público, de modo a melhorar a organização e divulgação do MOTELX no próximo ano. Obrigado pela participação.

01. Em que edições do MOTELx já esteve presente?

- 1 2015 5 2011 9 2007
 2 2014 6 2010 10 Nenhuma / 1ªVez
 3 2013 7 2009
 4 2012 8 2008

02. A que outros festivais de cinema costuma ir?

- 1 Indie
 2 DocLisboa
 3 Mostra
 4 QueerLisboa
 97 Outro(s). Qual(ais): _____

03. Como soube da existência do MOTELx?

- 1 Jornais/Revistas
 2 TV
 3 Rádio
 4 Outdoor [cartazes, mupis]
 5 Publicidade em transportes [Carris, Transtejo, Metro]
 6 Redes sociais
 7 Website oficial MOTELx
 8 Amigos /familiares

04. Diga, por favor, quem é o patrocinador principal desta edição do MOTELx?

97 Não Sabe

05. Diga por favor, que outras marcas e entidades associa a esta edição do MOTELx?

97 Não Sabe

6. Numa escala de 1 "mau", a "6" óptimo como classifica:

- | | Mau | 1 | 2 | 3 | 4 | 5 | 6 | Óptimo |
|-------------------------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|
| A Organização do Festival | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| A Programação de filmes do Festival | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Os Realizadores convidados | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| As Masterclass e Worksops | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| O Festival MOTELX no global | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |

7. Qual o meio de transporte que utilizou para vir até ao MOTELx?

- 1 Carro 4 Comboio 7 Mota
 2 Autocarro 5 Metro 8 Bicicleta
 3 Táxi 6 Barco 9 Outro. Qual? _____

8. Qual é a sua Idade? Anos

9. Género ? Masculino 1 2 Feminino

10. Qual o Concelho onde Reside? _____

11. Qual o seu grau de instrução?

- 1 Mestrado/Doutoramento 5 9º Ano
 2 Licenciatura 6 Instrução primária
 3 Curso médio/Politécnica/Técnico 7 Outro. Qual?
 4 12º Ano

A organização do festival MOTELX, agradece a sua participação. Gostaríamos de conhecer a sua disponibilidade para voltar a ser contactado, para responder a um inquérito mais aprofundado.

- 1 Sim 2 Não

Diga-nos por favor os seus contactos para os quais o poderemos contactar:

e-mail _____
Telefone fixo _____
Telefone móvel _____

Appendix 8 – Audience satisfaction chart comparison

The audience satisfaction charts evaluate the public's evaluation of the festival in general and then, more particularly, of the festival's organization, the program, the guests, and its masterclasses and workshops. The following figures show the evaluation given during the last three editions of the festival where the survey was administered.

Figure 1: 2016 Audience Satisfaction Chart

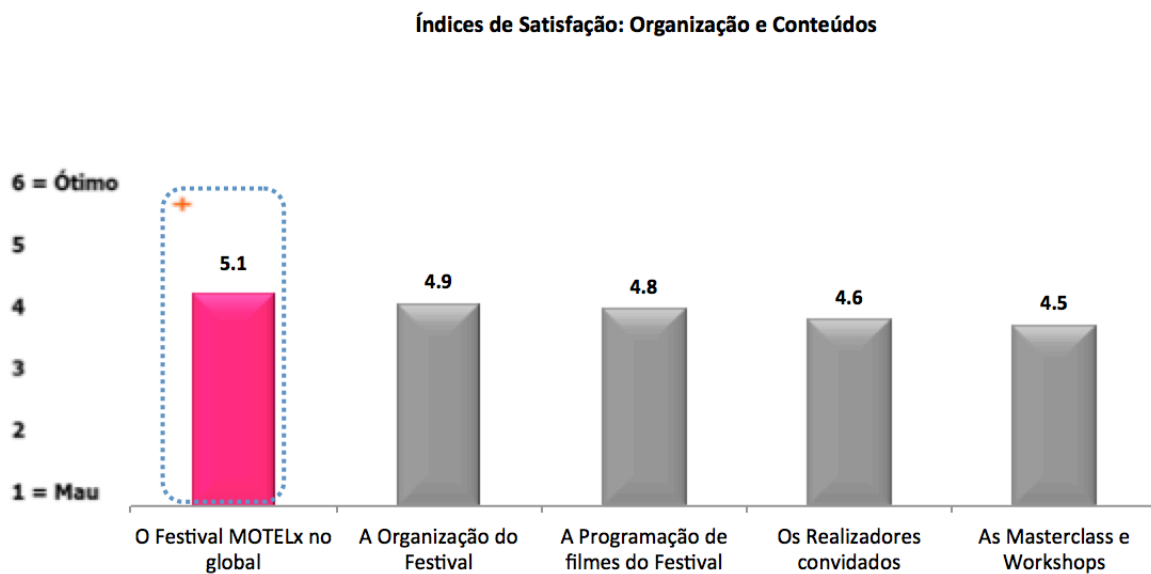


Figure 2: 2015 Audience Satisfaction Chart

MOTELx
Índices de Satisfação: Organização e Conteúdos

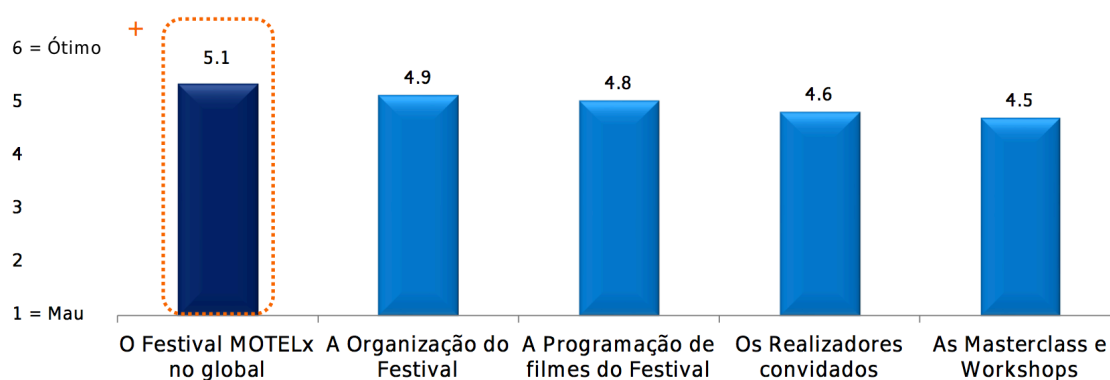
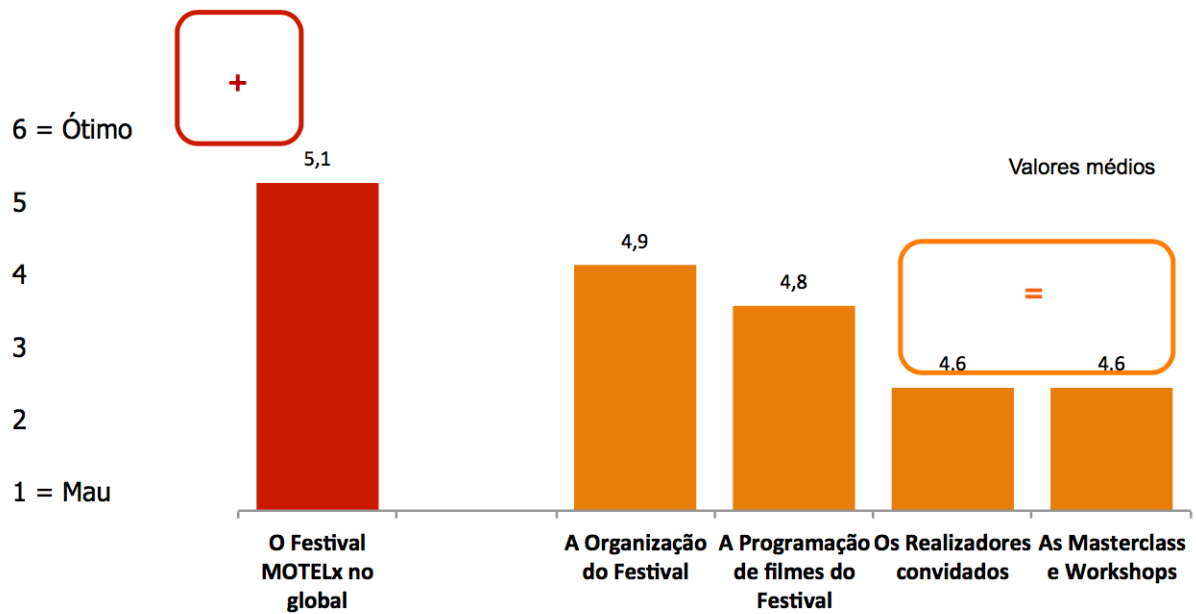
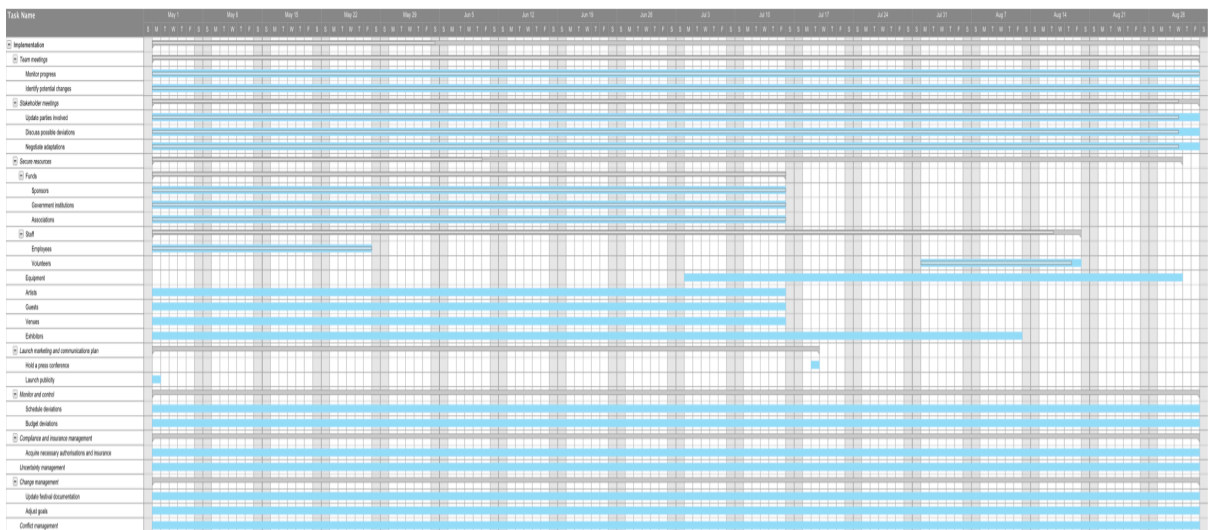
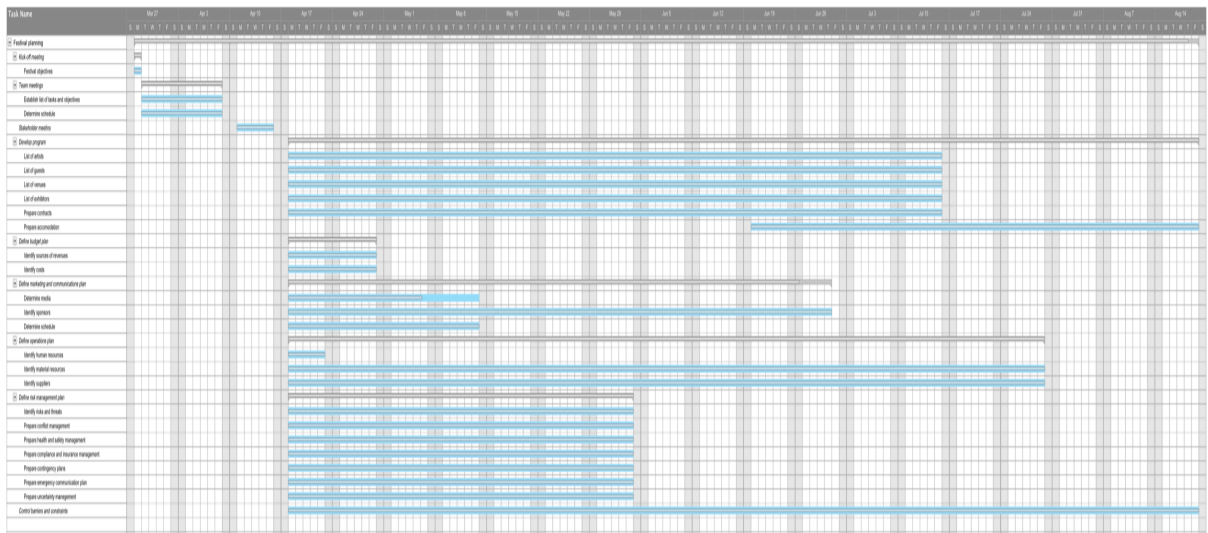
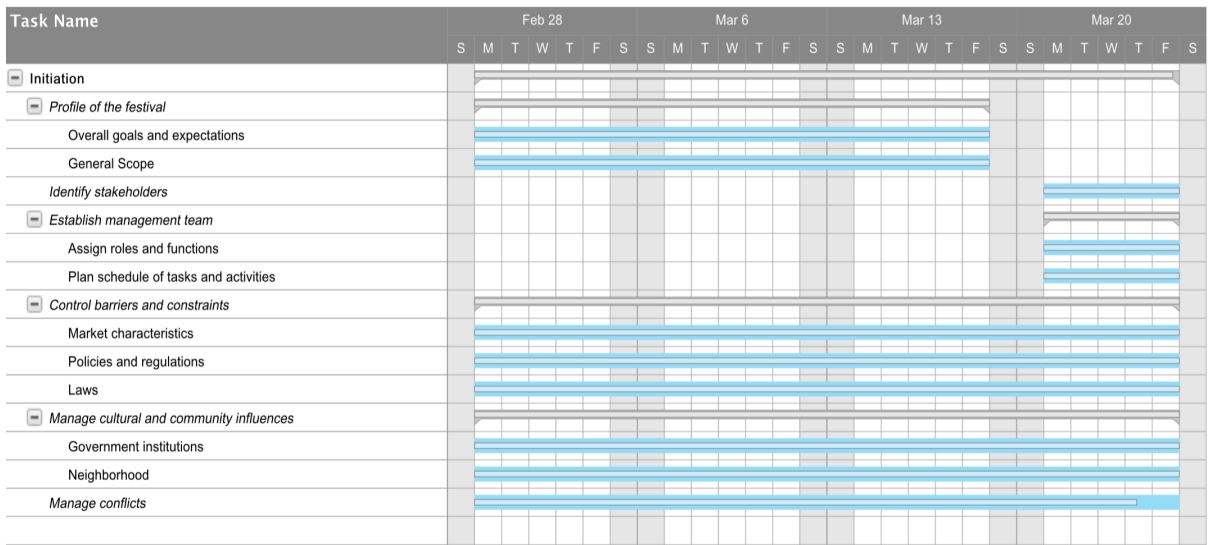


Figure 3: 2014 Audience Satisfaction Chart



















































It is clear that the level of satisfaction has remained constant, with just a 0.1 decrease for the masterclasses and workshops from 2014 to 2015. Reasons for such a change were not researched given the very small percentage it represents. What truly matters is that the overall festival has been continuously rated as “great” and has generally received positive reviews. The goal for future editions is to always try to improve these ratings, in all categories, and eventually reach the “excellent” rating.

Appendix 9 – GANTT chart



Appendix 10 – MOTELX 2016 partners and sponsors

PATROCINADOR PRINCIPAL 		PATROCINADORES     				
PARCERIA ESTRATÉGICA  	CO-PRODUÇÃO 	PARCEIRO DE PROGRAMAÇÃO 	APOIOS INSTITUCIONAIS     			
APOIOS          						
HOTEL OFICIAL COMPETIÇÃO LONGAS 	MEDIA PARTNER   	PARCERIAS      				
PARCERIAS LOBO MAU 	PARCERIAS WARM-UP      					
PARCERIAS SESSÃO DE APRESENTAÇÃO  	PARCEIROS SPOT PROMOCIONAL   	PARCEIROS INTERNACIONAIS  	ORGANIZAÇÃO 