

A Guide to Planning and Hosting Festivals and Events in Nova Scotia



A GUIDE TO PLANNING AND HOSTING FESTIVALS AND EVENTS IN NOVA SCOTIA

Project Management:
The Economic Planning Group

Content Update:
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With the support of:



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The information and analysis contained herein is intended to be general and represents the research of the authors and should in no way be construed as being definitive or as being official or unofficial policy of any government body. Any reliance on the Guide shall be at the reader's own risk.

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FOREWORD

We trust this guide will help you with your planning as well as identifying and addressing the countless details that go into hosting a successful festival in Nova Scotia.

Festivals and events are fun celebrations for visitors to Nova Scotia and for our own residents. But, planning them and putting all the pieces together so that they run smoothly and everyone has a good time can be hard work. There are lots of things to consider – from having a venue that fits with the event to making sure you earn or raise enough money to cover all your costs; from recruiting the volunteers you need to providing security and hospitality for your entertainers. You also have to be thinking about next year, and the year after that – What do we need to do differently? What will help bring more people and more benefits to our community?

This guide covers all of these topics, and a lot more. It's a great resource if you are starting a new festival. And, it has lots of insights and suggestions that will be useful if you have been running your festival for several years.

The guide has been prepared on behalf of Tourism Nova Scotia. It updates and adds new material to a document originally developed in 2005. The project was coordinated and edited by the Economic Planning Group. Content updates were provided by Premier Entertainment Group.

Thank you to Nova Scotia festival and events managers: Joella Foulds (Celtic Colours International Festival), Wayne Hamilton (2012/13 World Junior A Hockey Challenge), Lia Rinaldo (Devour! The Food Film Fest) and James Boyle (Halifax Pop Explosion), for their invaluable comments which helped fine-tune the content. The 'Helpful Tips' scattered through the manual are based on their experience developing and delivering festivals and events. Thanks also to the other festival and event operators who contributed the quotations found throughout.

10 THINGS YOU NEED TO KNOW ABOUT HOSTING A FESTIVAL OR EVENT

1. Festivals are fun celebrations for visitors and for your community. They can help bring tourists to your area and to the province overall, creating economic impacts. But, festivals do require lots of advance planning and work to convert vision into reality.
2. Do your research. Investigate other festivals to see what makes them successful. Research potential partners and sponsors to understand their missions and what could align them with your festival.
3. Your festival management team will need vision, passion, team building and communications skills and expertise. And, you will need some people that are detail-oriented since festivals are all about the details. Some festivals are run totally by volunteers; others have some paid staff as well.
4. Your choice of location and sites or venue(s) will set the tone and atmosphere for your festival. Choose carefully. Think about the logistics that will be involved, the type of event, possible weather impacts and the regulations that will need to be addressed.
5. Volunteers are the backbone of every event. Recruit them carefully, provide training and guidance, recognize them and thank them, regularly.
6. Attracting sponsors means understanding what you have to offer that will be valuable to potential sponsors. Sponsorship is an exchange between your festival and the sponsoring organization, it is not a gift. Treat your sponsors well and be sure to follow up with them.
7. Have contingency plans in place, including detailed procedures for handling emergencies and communicating with your team when these happen.
8. There are regulations at the municipal, provincial and federal level that your festival will need to follow. Some require inspections. Identify these early in your planning and work with the appropriate agencies as necessary.
9. On-line and social media marketing will likely be the most effective promotional tactics for your festival. Like any marketing, they require careful planning along with human and financial resources to get it right.
10. Keeping your festival fresh and exciting is a key success factor. Expand in a controlled fashion, with each new step being carefully considered, planned and implemented.

HOW TO USE THIS GUIDE

This guide provides information and advice on planning for and delivering a festival or event in Nova Scotia. Its focus is on festivals and events that play a role in attracting visitors to Nova Scotia and its communities, giving them a chance to experience what is unique about our culture, heritage, creative industries, landscapes, communities and people.

It covers the things you need to consider from the initial idea through selecting a site and date, the logistics, production, marketing and post-event evaluation.

If you are in the early stages of planning a festival, focus on Chapters 1 to 4 first. They will help you get started and tell you what licences you will need.

If you already run a festival or event, Chapters 5 through 10, 12 and 13 will be most useful to you. These chapters cover:

- Revenue generation, budgeting and other money issues (Chapter 5)
- Partners and sponsors (Chapter 6)
- The People (Chapter 7)
- Operations and Logistics (Chapter 8)
- Programming and Production (Chapter 9)
- When Things Go Wrong ... (Chapter 10)
- Marketing (Chapter 12)
- Post-Event Issues (Chapter 13)

If you are thinking of bidding for a major event, such as a national sports event, Chapter 11 will help get you started on this process.

Throughout the guide, you will find helpful tips and examples of how other Nova Scotia festivals and events have done things. And, there are lots of web links to other resources and more details on the things you need to know.

The Appendices provides some templates that you may find useful for your detailed planning and budgeting.

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CHAPTER 1: FESTIVALS AND EVENTS TODAY

1.1 WHAT ARE FESTIVALS AND EVENTS

Festivals are celebrations involving multiple activities happening over several consecutive days. They are usually held annually and in the same general location each year. Festivals are centered on a theme, special interest or some unique aspect of the community. They are usually community and volunteer-driven, but there are festivals that are developed and operated by both for-profit and not-for-profit businesses. Festivals are, by their nature, fun!

The words ‘festival’ and ‘event’ are often used interchangeably, but there are events that are not festivals. These are more occasional events, focused around a specific activity. Examples of events that are not festivals include:

- Business events such as trade shows or conventions.
- Major sports and other events that involve a bid process.
- One-time events, such as anniversary celebrations, for example, Titanic 100.
- Events that happen on one day only, or regularly but not consecutively, such as weekly Ceilidhs, concerts or theatre performances.

Examples of Festivals and Events in Nova Scotia

- Arts and culture, e.g. Scotia Festival of Music, Halifax Greek Festival, Avondale Art Fair
- Music and entertainment, e.g. Celtic Colours International
- Family, e.g. Wood Harbour Days
- Food & Drink, e.g. Pictou Lobster Carnival, Coldwater Seafood Festival
- Outdoor and sports, e.g. Scotiabank Bluenose Marathon, Annual Ox Pull in Caledonia
- Heritage, e.g. National Aboriginal Day at Kejimikujik National Park
- Ceilidh and Kitchen parties, e.g. Daily Lunch Ceilidh in Judique
- Community festivals and celebrations, e.g. Annapolis Valley Apple Blossom Festival
- Major Events, e.g. 2015 Ford World Men’s Curling, Junos, ECMA’s

Throughout this document the words ‘festival’ and ‘event’ are used interchangeably. The one exception is Chapter 11 which is about Major Events.

1.2 FESTIVALS AND EVENTS IN TOURISM

Nova Scotia’s Tourism Strategy is focused on attracting more first-time visitors to the province and on helping visitors plan their vacation while they are here. Festivals and events can play an important role in both of these goals by influencing and motivating travel. They celebrate features of Nova Scotia and its communities that are unique and special, giving visitors a reason to visit, stay longer and spend money.

Festivals and events can have significant economic impacts, both directly and through the spin-off benefits to the area. Major events can generate major economic impacts for Nova Scotia and garner extensive national and international media coverage, increasing awareness of the province as a place to visit, live and do business.

Festivals and events can also achieve a variety of other positive outcomes:

- Build community pride, spirit and self-esteem.
- Educate the community, particularly its young people, about the special attributes of the community: its culture, its heritage, why it is good place to live and to visit.
- Provide an opportunity for community members to participate in a variety of activities together, strengthening community relationships.
- Help build and develop volunteerism in the community.
- Generate important social benefits, helping to develop a sense of community and create an image of the community.
- Support the development of community recreational facilities and enhance quality of life in the community.
- Build awareness of the community and its appeals as a place to visit, live, or to establish a business. Indirectly this supports the community's economic development efforts.
- Be a celebration and fun for the community and visitors.

1.3 TRENDS IN FESTIVALS AND EVENTS

Technology changes together with changing demographics, lifestyle and interests are driving trends in festivals and events. Some key trends are:

- Growth in the Internet and social media have fundamentally changed the way festivals and events are marketed, giving a more effective way to reach target audiences than traditional advertising.
- There are more niche festivals and events, celebrating special interests and hobbies, since it is easy to reach communities of interest through the Internet.
- New technology is making on-line ticketing an option, even for smaller events. On-line ticketing can also provide lots of information about your audiences and how effective your marketing is.
- The use of mobile devices at festival sites by visitors and festival organizers (e.g. to verify tickets at the gate, read credit cards) is becoming common.
- Festival goers are becoming more demanding. They expect more choice, more experiences and authentic programming.
- There is more demand for personalized festival experiences, such as VIP passes, for both festival goers and sponsors. People are willing to spend money for a unique experience.
- There is strong and growing interest in anything to do with food, wine and craft beer.
- 'Local' is very important.
- Camping on-site or nearby in association with festivals is popular in Nova Scotia particularly in association with music events.

- Hybrid festivals – broadening the appeal of an event by adding complementary activities – are increasing. This helps grow audiences, gives them more ways to spend money and also helps grow the sponsor pool. Examples are adding a wine tasting to an arts festival, or adding live music to a biker event.
- There is more competition for funding, partners, sponsors and consumer dollars.

1.4 REQUIREMENTS FOR SUCCESS - IN A NUTSHELL

All of the following play a role in making your festival or event successful. Each is addressed in this guide.

- A strong concept. The festival must be rooted in something that you want to celebrate. Also, it must be well-designed to attract its target audiences.
- Create enthusiasm within the local audiences. It's critical that they appreciate and value the event.
- Strong governance, provided by a board of champions and leaders.
- Competent management, either paid or volunteer, provided with the authority to get the job done.
- A strategy for maximizing revenue.
- Careful planning and budgeting, and cost controls.
- A good site in terms of convenience, appeal, visibility and required support facilities.
- Professional assistance in critical areas.
- Community and, where appropriate, government support.
- The necessary permits and regulatory approvals.
- A well-thought out event and logistical plan, including risk assessment.
- Attracting sponsors and partners, and nurturing them for the long term.
- Solid contracts with suppliers and service providers (concessionaires, etc.).
- A vibrant volunteer program.
- Adequate funding.
- Effective marketing.
- Measuring the impacts of the festival, including the experience of visitors, staff and volunteers.
- Having a strategy and plan for the future – for growing and developing the festival and establishing a legacy for your community.

A Nova Scotia Event Legacy

"The 2012-13 World Jr. A Challenge in Yarmouth left a legacy of \$128,000 that will be used for local projects such as female hockey programs, grants for local events and to promote Jr. A hockey programs, to name a few."

Wayne Hamilton
2012-13 World Jr. A Challenge Society
Yarmouth

CHAPTER 2: THE FESTIVAL IDEA – AND WILL IT WORK

A festival starts with an idea, a dream and a vision. Then the idea must be explored and developed.

CHAPTER MODULES

2.1 The Concept (page 4)

2.2 Research and More Research (page 10)

2.3 Preparing a Business Plan (page 11)

Key Takeaways

- ❖ Have a strong, creative idea and a vision for what you want to achieve.
- ❖ Think about the basics – the Who, What, Why, When and How
- ❖ You need to do your research – look at what others have achieved. Calculate potential revenues and costs and figure out if it's feasible to proceed.
- ❖ A festival needs a business plan – and a detailed critical path schedule for what has to be done when.

2.1 THE CONCEPT

SO YOU HAVE AN IDEA, THEN WHAT?

Developing a festival starts with an idea. Ideally this is a strong, unique and creative idea seeded in an individual with energy, leadership and vision. The idea then needs legs. It needs the initial visionary and a capable team to move it forward, evolving it into a real project.

To create a vibrant and successful festival, organizers need to clearly define their objectives and timeline.

EXPLORE YOUR IDEA FULLY

Building a full concept for the festival is a critical early step in the planning process. Fully consider all aspects of what the event will entail before moving forward. The concept behind the festival needs to be a compelling and unique idea. It needs to be strong enough to entice people to support it, attend it, recommend it, and spend money at it.

Key questions to ask:

- Why? – What are your objectives? What will this do for you or your community? Will people experience something different, compelling and do-not-miss?
- Who? – Who are your target audiences? Local community, tourists, families? Does it engage the community at large?
- What? – What is the experience you want to provide for attendees? Is it unique to your community?
- When? – Make sure to give yourself 10 – 12 months for planning.
- How? – Who is going to help you make this happen? Will others in the community benefit from your festival? E.g. accommodations, restaurants. Are there sponsors out there that could help? What about other sources of funding?

From Vision to Reality

"I believe the reason that Devour! The Food Film Fest has become so successful in a short period of time is because we zeroed in on a specific new niche. We took two great genres – cinema & food – and pushed them together in a region that is considered to be both a culinary and cultural hub in Nova Scotia, the town of Wolfville. Having a clear vision, an unwavering focus and a long term view of your event is key"

**Lia Rinaldo, Managing Director
Devour! The Food Film Fest
Wolfville**

We suggested you deal with the **Why** and the **Who** before the **What**.

WHY? YOUR VISION AND OBJECTIVE(S)

Write down: 'What is your Vision'. Be clear, be brief, and be inspired. Your vision will help motivate others. You can't kick the ball across the goal line if you don't have the goals in place.

Once you have your vision, decide on your objectives.

Objectives should be SMART:

- Specific
- Measurable
- Achievable
- Realistic
- Time Specific

What is a Vision?

A vision is a picture of a future desired situation. It is a description of what you want your festival to become and achieve in the long term.

Establish a vision that is brief, and is realistic and attainable; it will be the foundation for your festival strategy by mapping out where you want to get to.

A festival is a celebration. What is it you want to celebrate? What is the purpose of the celebration? What is it you hope to achieve in the end? Clearly answer these questions as a first step. Common objectives include:

- To create a celebration.
- To leave a legacy to the community.
- To make money.
- To create a festival that will last for years to come and become a legacy for your community.
- To attract tourists.
- To educate others about a particular art form or cultural heritage.
- To commemorate an important aspect of the community that is a source of pride.
- To celebrate the uniqueness of your community.

Be as clear as you can in defining your objectives and what you intend to accomplish.

Once you start putting the key pieces of the concept on paper, it will change somewhat, it will morph, it will solidify and it will start to appear as a real festival.

WHO? THE TARGET AUDIENCES

Who is your target audience(s)? Your answers may spring from your objectives.

- Is your prime audience local, a segment of the local community, other Nova Scotians? Or, is your prime audience visitors to Nova Scotia? Or is it both?
- What age group are you looking to attract?
- Are you looking to attract a specialized market? Music genre fans, car enthusiasts, foodies, for example?

In the context of your objectives, identify the audiences you intend to target in order of priority. Pay attention to the question of how you are going to reach your target markets with the marketing resources available to you. This may influence which ones you choose to target.

With social media identifying your target markets and reaching out to them has never been easier (though it still takes time, skills and money). Refer to Chapter 12 on Marketing for more information on how to identify and reach your target market.

WHAT? THE EXPERIENCE

The concept behind the festival needs to be a compelling idea, one that captures the imagination. It needs to be exciting. It needs to be strong enough to attract the interest and support of others in the community, particularly those you are looking to get involved.

Know Your Local Audience

“You need to know your local audiences – What are they interested in? What types of activities and entertainment will attract them? Will they be passionate about the festival over the long term? And, will they be interested in volunteering for the festival or event you are planning? If you aren’t doing it for your community, don’t do it.”

**Joella Foulds, Executive Director
Celtic Colours International Festival
Cape Breton**

Ultimately it will need to attract the interest of the audience(s) you wish to attend. If you are targeting tourist markets, it also needs to be unique to your community, something different from what else is happening nearby.

Identify the experience. What is going to be happening for the duration of your event? What is the primary focus, secondary focus and perhaps third? For example: Music festival is the primary focus, 2) vendors, concessions and experiencing the food is the secondary focus and 3) workshops, the third focus.

Check out the competition far and wide. Search other ideas in the province, nearby, other communities and beyond. Is your idea being done in Alberta, Ontario, New Brunswick and not in Nova Scotia? Check out their programs and what looks to be working and incorporate them into your concept.

Think like a professional marketer thinks with respect to how your festival is going to be represented in the marketplace. It should have strong **Unique Selling Propositions (USPs)** that will capture attention and interest. The event should be 'positioned' in the marketplace as an experience that is different, compelling and not to be missed. And, it should have a strong and readily recognizable theme that connects with the target audience(s), and is communicated in the form of a brand. The brand is made up of the name and a logo, sometimes accompanied by a tag line.

The event scope shouldn't be restrictively narrow and specialized. In order to be successful in attracting the desired level of attendance, a festival needs a broad enough scope to appeal to the various markets available. At the same time, it shouldn't be so broad that it loses focus on what it is about.

The scale of the event is key. The number of things to do and see, and the duration, needs to be appropriate in a number of respects:

- How many days are you planning and what time of year?
- What times of the day or evening will you be programming?
- What is the likely number of attendees?
- What resources are available?
- What makes your idea unique from other common festivals at that time of year?

With new festivals or events, a modest start is a good approach – you might want to consider keeping things short in terms of hours and days of operation. It's far easier to build on a successful first edition, adding hours and days as appropriate.

When it comes to programming, it should be fun, sometimes educational, definitely experiential, memorable and, for some, perhaps something never seen before. Although people generally come out to events to have fun, the focus is moving quickly to healthy experiences, nature experiences, and food and wine experiences. It is all considered fun to the participants, yet there are often opportunities to have a legacy of learning and opening up people to new experiences. For example, a marathon is challenging to the participants who run and entertaining to the audience and families cheering them on surrounded by food, music and celebration.

A music festival might have an educational component or the opportunity to support musicians in the community.

Above all, remember the KISS (Keep it Simple Stupid) principal. In spite of what we've said above, keep things as simple as you can, especially in the first years. Add to it by layers each year you are in the business of your event.

Sometimes it's possible to attach your festival to another festival or event. This might be a larger, more successful project, or a more established event. This strategy offers a number of potential advantages relating to marketing, appeal to the visitor and operational efficiencies. As an example, you might link a culinary event to a harvest festival. This is a reasonable proposition given that the two events are complementary in theme and experience; they cater to similar audiences and provide mutual benefits to the two organizing groups.

WHEN? THE DATE

You will want to make sure there are no conflicting dates with other festivals in the community or surrounding communities. Many municipalities have a centralized schedule that outlines all events and activities in the area.

Some sources to check for potential date conflicts:

- On-line events calendars such as <http://www.novascotia.com/events>
- Your local municipal website
- Local service clubs like Rotary Club, Lions Club, Legion, Knights of Columbus
- Local schools, colleges and universities
- Community newspaper or radio
- Chamber of Commerce
- Visitor Information Centre
- Churches

Make sure you are not competing for the same market. If there is another event planned nearby and for the same days, it's a good idea to work with them in coordinating your programming schedules.

If you are developing a niche event that you want to position on the national or international stage, you need to research what else of a similar nature is happening anywhere.

Location is Critical

"You have to be able to look down the road long-term and ask yourself if there is room to grow the event in this place. Is there enough space, accommodations, venues, restaurants, parking, etc.? If not, you have to be prepared to help build that infrastructure as part of your overall plan in order to stay there."

**Lia Rinaldo, Managing Director
Devour! The Food Film Fest
Wolfville**

WHERE? LOCATION LOCATION LOCATION

Location seems an obvious thing, but it isn't always so. Your choice of venue will set the tone and atmosphere of your event and admission costs. A music festival held in a professional 'soft-seat' theatre will have a totally different feel for your attendees than one held in a field in a tent. This doesn't mean you can't do both.

Having the bulk of your event outside, with either a 'sneak peek preview gala' or end of festival 'All Star Show' in a theatre may be a way to change up the feel of the event and even target a different audience.

If you are thinking of an outdoor event there are extra logistics that need to be taken into consideration. You have to book these areas well in advance and be sure to consider any power requirements you need. Using generators can not only be noisy but also costly.

Arenas are another option – again keep in mind that they too have a booking high season and low season and you will need to consider extra costs for covering ice or basketball courts.

Depending on the scope of your event, proximity to other communities to share resources or combine efforts is also an option. Sporting events will often partner with surrounding communities so as to have more fields or ice surfaces to work with.

HOW? MAKING IT HAPPEN

Early on it's important to consult with your municipality, community and business leaders or associations who may have an interest or stake in your event. Give them an opportunity for input and to share in the ownership of the event by becoming active supporters and participants. Treat your festival or event like it's a business. It is a business!

It will take people to support your idea, committees to move it forward, a board of directors to monitor it and supporters to connect it to the community. Be sure to research all areas you need to be versed in – sponsorships, regulations, legal issues, venue rental, how to form a good working committee, working with volunteers, marketing. What do other festivals have in common with your idea? How can you borrow ideas?

Helpful Tip:

Engage with Connected People

If well-connected people in your community take a vested interest, engage them immediately as potential board members or partners. You need as many event ambassadors as you can get in the early stages.

Although it might seem like putting the cart before the horse, while you are thinking of how to get your new event off the ground, you must also build in ways to evaluate the event and measure your success. Decide what you are going to measure and plan to do a survey to collect the information you need. It's important you start this from the very first edition of your festival so that you get to know your audience and know where you need to make improvements. You can offer a prize for those completing the survey. It also gives you a way to start building a data base of your visitors.

Keep in mind that in general you need to allow 3 – 5 years for a new event to find its ‘legs’ and become successful in terms of attendance, talent growth and market awareness. Each year you learn what works and what doesn’t, resulting in a more mature, focused event.

All of these points are explored in greater detail in later chapters of this manual.

SPREADING YOUR WINGS - A FESTIVAL AS A TOURISM GENERATOR

Festivals and events can be successful tourism generators but you need to keep some special considerations in mind:

- The theme for the festival must be of interest and relevance to your target tourism markets and not just the local audience.
- The experience must be extensive and appealing enough to motivate people to travel to the event or stop by.
- You must promote the festival to visitor markets.
- You need to have visitor services in the entry area such as maps, information on accommodations, restaurants, etc.
- The event should have the capability of handling groups, such as bus tours.

While tourists passing through your area at the time of the festival may be an easy sell, motivating people to travel to the festival is a tougher challenge. How far will people travel to attend the event? There has to be enough going on to make it worth their while to travel to your festival. Providing tourists with information on other attractions in your region may give them a reason to come as well as stay – benefiting not only your event but also your local hotels and businesses.

The festival may also be of interest to tour operators. The scope and appeal of the event will dictate how feasible this might be. Contact your regional tourism organization or Tourism Nova Scotia to see what options there are.

Making it Happen

“Once you have an idea, do your homework. Get support from those who control your targeted participants. Assemble a strong steering committee. Then present your idea to your potential volunteers and the public.

‘Chicks with Sticks’ – a Provincial Female Hockey Tournament was born this way – from a phone call and a request, and in October 2015 it will celebrate its 8th Annual Tournament.

Wayne Hamilton
2012-13 World Jr. A Challenge Society
Yarmouth

2.2 RESEARCH, AND MORE RESEARCH

Part of the decision to proceed requires addressing financial feasibility. As an overview, consider the following:

1. The attendance and revenue potential for the event, including funding from festival attendees, government, sponsors and the community.

2. What it is going to cost to stage the event, including its organization, implementation and promotion. Include expected capital costs, if any, for facilities and infrastructure as well as operating costs before, during and after the event.
3. Illustrations of comparable festivals elsewhere and how they have performed with respect to 1 and 2.
4. An analysis of competing festivals on at the same time in the province and how they might impact yours.

Determining whether your festival or event can sustain itself financially is an important step in your planning process. You should strive to ensure that the festival/event is self-sufficient, based on a reasonable and realistic set of assumptions with respect to visitation and revenue sources.

Chapter 5 provides information on how to budget for your event and there are templates in the Appendices to assist.

2.3 PREPARING A BUSINESS PLAN

All of the foregoing needs to be summarized in a business plan. This is important even for a small festival. It can be a very simple, point form document. It should cover:

- Legal status of the festival/event planning team and its structure, committees
- History of the festival/event
- Vision and Objectives
- Festival Concept, Date, Location
- Market Analysis
- Situation Analysis – Strengths, Weaknesses, Opportunities, Threats
- Festival Program
- Budget – Costs and Revenues
- Partners and Sponsor Opportunities
- Event Evaluation Plans
- Long Term Strategy

CHAPTER 3: GETTING STARTED

You will need a strong start-up committee to get things going. One of the most important decisions will be selecting a site or venues for the festival.

CHAPTER MODULES

3.1 The Start-Up Committee (page 12)

3.2 Selecting a Site (page 13)

Key Takeaways

- ❖ Establish your start-up committee and get the right people involved – visionaries, champions, leaders, sellers and doers.
- ❖ Look for sites and venues that are a good fit with your festival experience. Also, think about traffic and parking, weather impacts, the space and services the festival will need.

3.1 THE START-UP COMMITTEE

Once you have completed the planning steps outlined in Chapter 2, it's time to get started with organizing. You first need a committee if you haven't already got one.

The initial organizing group may be an ad hoc group to get the event started and then hands it over to a longer-term board of directors to oversee implementation. Conversely the board of directors may be established right away. Either way, the initial group needs to have the following kinds of people involved:

- The visionary(s) – the person/people who had the creativity in coming up with the original idea and can build commitment to the concept
- Champions – enthusiastic supporters who are also influential in the community
- Leaders – people who can organize, motivate and get things done
- Sellers – people who are good at going out and selling the event to target sponsors and partners
- Influencers – people who can build and maintain support with key organizations in the community that are important to the event's success
- Doers – people that can be depended on to get things done and are willing to do anything that needs to be done

This initial group will likely become your board of directors. Chapter 7 talks about the board, management and other team members.

3.2 SELECTING A SITE (OR SITES)

There are a lot of variables that can make or break a festival, and choosing a site is perhaps one of the most important decisions.

DESIRED FEATURES

In looking for a site, take into account:

- Suitability for the experience and program you are planning
- Access for visitors and suppliers
- Impact on the community and surrounding communities
- Adequate capacity and resources for your audience
- Services available
- Options in case of nasty weather
- Local sensitivities or issues, and
- Timing. Is the site available for a sufficient time for set-up and tear-down?

To ensure a healthy future for your event, it must have a positive impact on the community. The festival concept may be wonderful, and you and your board of directors expect positive impacts in the form of economic benefits from increased tourism to your area. But, if this comes at a price of blocked roads where residents aren't able to get to local shops, loud music that can be heard in people's basements and access to parks that is restricted or completely cut off, then community support can quickly turn sour and any promised economic impacts forgotten.

Festival sites can successfully be planned for the centre of a town or city complete with road closures, restricted street parking, and music, as long as the community is well aware of all the impacts. It's imperative for festival organizers to respect noise by-laws and other regulations and to make sure residents can access their homes, businesses and parking.

It may, on the other hand, be preferable to have the festival or event a little outside of town.

Helpful Tip: Assessing Venues

Here are some other things to think about when looking at venue options:

- Does it have the physical capabilities – washrooms, enough seating, suitable stage, ramps, etc.?
- Is it a positive central gathering place for the community?
- Is it a good fit for what you are planning? If the occasion is a small intimate concert, the local arena or school gym might not be the best spot.
- Talk to the Fire Marshal particularly when looking at an indoor venue – there are more and more restrictions that might impact your ability to use venues or their capacity.

TRAFFIC CONTROL AND PARKING CAPACITY

Traffic control and parking capacity can be big issues. Think about the following when considering a festival site:

- Will access to the site and parking be an issue? Is there a left hand turn from or onto a busy street? You may be required to hire police officers to direct traffic in such a case.
- Is there parking available on-site for all visitors? There should be a Plan B if that site fills up.
- Can signage be posted on the highways leading to the site?
- Can directional signage be installed on local streets to guide visitors to the site and parking areas?
- Is there a secondary access to the site for suppliers, staff, volunteers and entertainers?
- There may only be parking on-site for staff and volunteers, concession operators, handicapped visitors and entertainers. If this is the case, you will need lots of signs leading up to the site directing general visitors to off-site parking. Easy to read accreditation for the vehicles allowed on site will be imperative for trouble-free on-site parking.
- Is there room for a drop-off and pick-up area? This needs to be strictly supervised so it doesn't end up a very disorganized and unexpected parking lot!
- If you are operating a shuttle service to a parking area, make sure the way in and out and the pick-up/drop-off is not congested so the shuttle can run smoothly.
- Are tour buses expected? Where will they drop-off, pick-up and park?
- If you are using a field or other unpaved area for parking, what are the options if it rains for a week before, or during, your event?
- If you are charging for parking, make sure the signage is plentiful and clear before visitors enter the parking area. Also ensure that there is adequate room for them to turn around or keep moving forward if they choose to park elsewhere.

Involve the Experts

"I make it a point whenever I am considering an event, to visit the Town's Traffic Authority, the local police department and the local EMT unit to tell them what I am planning. They will tell you the dos and don'ts, and at the same time help you to make it workable for all concerned."

Wayne Hamilton
2012-13 World Jr. A Challenge Society
Yarmouth

Work closely with the local parking enforcement authority to determine parking options. If there will be additional traffic restrictions on surrounding streets, make sure they are well marked.

SHUTTLE SERVICE

Shuttles are a way to ease up on congestion around your festival site and move visitors efficiently. Make sure you clearly communicate to your audiences ahead of time that this kind of service (and its schedule) is available. As well, there needs to be lots of signage leading to the parking area and pick-up/drop-off points for the shuttle service.

A shuttle bus should normally be a free service for your visitors. The best schedule will vary depending on the event, the time of day and unique challenges. For some events, a shuttle will need to run at least every 15 minutes. At others, frequent shuttles before and after a major program will be required. Whatever you plan, make sure it operates late enough to get everyone back to their vehicles at the end of the event.

WEATHER WEATHER

Any outdoor event is subject to Mother Nature's surprises. You can't control the weather, but you can plan for it. Where will the crowds go in case of rain? Will they huddle under food concession tents until it blows over? Can the shuttle service get them back to their cars quickly? Do you have the possibility of re-scheduling? Can you move a concert or other element of programming to an indoor facility?

The best way to keep your audience members up-to-date is via social media. The moment you know there will be a change in the programming or venue, update your website, Facebook Page, Twitter, etc. and notify local radio stations. Remember to keep your staff, volunteers and vendors fully informed.

Let your volunteers and vendors know that in the case of any inclement weather, a mass email to all parties will be sent out. Tell them to keep an eye on the event's social media pages as well for the most up-to-date information. This may be the most efficient way to communicate and avoid a rush of phone calls to your office and staff.

On the other end of the spectrum, you may be unexpectedly overwhelmed with visitors if the weather is hot and sunny. Will you be ready for 20,000 people at your gate when you were expecting 5,000? Consider what will be needed for on-site concessions, drinking water and portable washrooms.

SERVICES

A festival site may have everything you are looking for in terms of parking, size and sufficient separation from the neighbours, but if it doesn't have services, you could be adding unforeseen expenses to your operating budget. Here are some things to watch for:

- Does the site have sufficient electrical service? Does it have enough capacity for your staging, concessions, lighting and other needs? Will you need to rent generators?
- Is there adequate existing lighting?
- Is the site on the local bus service route, or will all your visitors have to arrive by car? If there is bus service, what time does it start/finish?
- What is the drainage situation? If it rains for days before the festival, will there be a big pool in the middle of the field where your stage is supposed to go?
- How will the fire department access water in case of a fire on site?
- What about access for fire engines, ambulances and police vehicles?
- Is the ground level and easy for visitors to walk around? Can wheelchairs move freely?
- Are there washrooms on site, or do you have to rent 'Johnny on the Spot' service? Are there sufficient hand-washing stations?

Don't forget you are likely to need inspections for some licences and regulations. These are addressed in Chapter 4.

FESTIVAL OFFICE/LOGISTICAL FACILITIES/VOLUNTEER AND STAFF SPACE

FESTIVAL OFFICE

Your on-site festival office may be an actual office structure, a trailer or a tent. Either way, ensure you have access to power and Wi-Fi. Depending on the security of your HQ tent, other office equipment such as a printer may be useful. Always ensure there is a secure area for storing valuables and that only the right people have access to it.

Helpful Tip: Happy Volunteers

Food and water can go a long way to keeping your volunteers happy. Talk to some local businesses – they may be prepared to donate water and food in recognition of the hard work being done by festival volunteers.

VOLUNTEER AND STAFF SPACE

Volunteers and staff generally put in long hours at festival time. They are busy and on their feet most of the time. It's good to have a separate area, away from the hustle and bustle and unending demands on them, for them to eat, relax and socialize. One of the perks of working at or volunteering at festivals is the camaraderie that is created. A welcoming and comfortable gathering area can help facilitate this.

LOGISTICAL FACILITIES

The logistics staff and volunteers are the crew who pull the festival together literally from the ground up. They install fencing and barricades, move tables, set up tents, place trailers, help with stage equipment, erect signage, and a million other hands-on details. They need a secure headquarters location to store equipment, supplies and tools.

STORAGE AND HOLDING AREA

There will be some equipment and supplies that need to be stored. Valuable items will need to be in a secure area while others can be stored in a tent or under a tarp. You may be able to use existing facilities, or rent a tent or trailer. Portable storage units are a cost effective and very useful option for many events.

Security staff may have to be contracted a few days before the site opens because of the value of stored items. Security will have to be kept in the loop as to what is on-site and when deliveries are expected. Perhaps most importantly, they will need to know who has the authority to remove items from the site.

CHAPTER 4: RULES AND REGULATIONS

Rules and regulations are a fact of life and there are a wide variety that could be relevant to your festival. Check them out, talk to other festivals, your municipality and the province.

CHAPTER MODULES

- 4.1 Overview of Regulations and Licencing (page 17)
- 4.2 Municipal Regulations and By-Laws (page 18)
- 4.3 Provincial Regulations (page 18)
- 4.4 Federal Regulations (page 23)
- 4.5 Nova Scotia Registry of Joint Stocks (page 23)
- 4.6 Canada Revenue Agency (page 24)
- 4.7 Nova Scotia Workers' Compensation (page 26)

Key Takeaways

- ❖ There are regulations and requirements at all levels – municipal, provincial and federal.
- ❖ Your festival is like a business – it should be a registered organization, and you will most likely have to register for and submit HST, and also submit payroll taxes unless everyone is a volunteer.

4.1 OVERVIEW OF REGULATIONS AND LICENCING

Approvals and permitting are specific to each municipality and there are also various provincial approvals required. Many municipalities that host festival and events have a 'Special Events Task Force' made up of various departments that are integral to major events. These include police, EMT, electrical, traffic, waste removal and fire. Meeting with the head of this task force will help identify any permits you may require both through your municipality as well as with the province.

Here are some of the other approvals you might need:

- A land use agreement may be involved for the use of the site
- Food safety
- Fire protection, emergency access and services
- Food service/concession establishment permits

- Vendor permits for retail outlets on-site
- Liquor licences for on-site alcohol service
- Employment-related requirements for festival staff and for contract/concession staff
- Off-site traffic control, street/sidewalk closures, signage, banners, parking meters
- Fireworks
- Electrical permits
- Parade permit
- Noise by-law exemption for scheduled times and sound levels

Don't be intimidated by all of the permits required. The application forms and the process of obtaining these approvals and licences/permits are generally fairly simple. It does, however, take a bit of time and this should be budgeted.

A discussion of the permits and approvals you may need, as well as sources to check out any additional requirements, are described below. This information and the approvals you may require can change quickly so make sure you do your own research as well.

4.2 MUNICIPAL REGULATIONS AND BY-LAWS

Municipal regulations and by-laws vary from municipality to municipality. It is very likely that your municipality will have a number of regulations that your festival/event will have to meet. An example is by-laws governing noise that may limit hours of operation. Other concerns are signage, the types of events you can hold, traffic, parades, fireworks, selling food or retail items (e.g. municipal vendor's licence), food handling, etc.

A special event permit may be required by the municipality. Find out the timelines involved. Some permits may require that the paperwork is done up to eight weeks before the event. If there is a charge for a special event permit, use of a public site or for special services, always ask if there is a financial break for community groups or non-profits.

Contact your local municipal office early in your planning process to determine what licences/permits you will require and what regulations are in place that might impact the nature, location or timing of your festival/event.

4.3 PROVINCIAL REGULATIONS

4.3.1 NOVA SCOTIA ALCOHOL AND GAMING DIVISION

The Nova Scotia Alcohol and Gaming Division of Service Nova Scotia is responsible for issuing Outdoor Festival/Concert Licences as well as Liquor Licences. There are several regulations and licences that may be

relevant to your festival/event. These can be found through <http://novascotia.ca/sns/access/alcohol-gaming.asp>.

PLACE OF AMUSEMENT LICENCE

To hold an outdoor festival or concert in Nova Scotia, you will need a Place of Amusement Licence (Outdoor Festival/Concert). A link to the Application Form and details on applying can be found at <http://www.novascotia.ca/sns/paal/agd/paal225.asp>.

Anyone who intends to offer an itinerant performance in Nova Scotia, that is one that travels from place to place on a circuit, such as a circus, also needs a Place of Amusement Licence (Itinerant). If you are planning such a performance for your festival/event, you should make sure that the appropriate licence is obtained.

LIQUOR LICENCE: SPECIAL OCCASION

If you are planning to provide liquor service you will require a Special Occasion Liquor Licence. Information can be obtained from <http://novascotia.ca/sns/access/alcohol-gaming/liquor.asp>.

There are special terms and conditions associated with Special Occasion Licenses which can be found on the application form (<http://novascotia.ca/sns/pdf/agd-application-for-special-occasion-liquor-licence.pdf>) including limitations on advertising. As well, outdoor event applicants must meet other conditions including:

- Restricting the licensed area to a tent or suitably enclosed area
- Obtaining approval from the Fire Marshal if a tent is being used
- Providing a diagram or sketch of the location where the event will be held

If admission is being charged, a Place of Amusement License is required. There may also be different requirements (and licence fees) for a for-profit festival and a not-for-profit one.

OTHER LICENCES/LOTTERIES

The Alcohol and Gaming Division also administers a variety of other licences that may be required for your festival/event, depending on the type of activities you are planning. These include: Bingo Lottery License, Games of Chance Lottery License; Ticket Lottery Licences. Review all the licence requirements at <http://novascotia.ca/sns/access/alcohol-gaming/gaming/licences.asp> to make sure that you are aware of all the licences you might need for the event.

4.3.2 AMUSEMENT DEVICES LICENCE: DEPARTMENT OF LABOUR AND ADVANCED EDUCATION

The *Amusement Devices Safety Act* provides for the inspection and licencing of amusement devices and temporary structures at carnivals, fairs, and amusement parks. If you have these at your festival, they will

likely be managed by a concession operator. However, you should be aware of the regulations and the inspection requirements. Details can be found at <http://novascotia.ca/lae/equipmentsafety/amusementdevices.asp> and the Amusement Devices Licence application at <http://www.novascotia.ca/sns/paal/lae/paal246.asp>.

4.3.3 FOOD ESTABLISHMENT PERMIT: DEPARTMENT OF AGRICULTURE

Food Establishment Permits are required for anyone who wants “to operate a foodservice facility such as a restaurant, food take-out, mobile canteen, temporary food establishment, or a grocery store or push carts or any facility from which foods are sold, whether on a permanent basis or only occasionally”. A Temporary Event Permit is required for the sale of foods at Temporary events, fairs and festivals. It is required for a booth or other structure operated for fourteen consecutive days or less per year and also includes food booths set up by community organizations to raise funds.

Details can be found at <http://novascotia.ca/agri/programs-and-services/licensing-and-permits/>.

A municipal vendor’s licence is also often required so make sure you check with your municipality as well. Some municipalities also require that all food handlers take the Food Safety Handling Course.

4.3.4 OFFICE OF THE FIRE MARSHAL

If you are planning to use tents, you will require the approval of the Fire Marshal and there will be limitations on the number of persons that can be accommodated in the tent (Chapter 8.4 provides more details on tent regulations). Contact the Fire Marshal’s office in your area or through <http://novascotia.ca/dma/firesafety/OFM.asp> to review your plans and obtain approval. If you are using other facilities that are already approved by the Fire Marshal, there will be capacity limitations and likely other requirements in place that you will have to adhere to. It can be very valuable to check with the Fire Marshal before you commit to a space.

Fireworks fall under the jurisdiction of the Fire Safety Act, which is administered by the Office of the Fire Marshal. There are also Federal Regulations that cover Display Fireworks and the certification required to use them (<http://www.nrcan.gc.ca/explosives/fireworks/9883>). You may require a municipal permit for the discharge of fireworks as well.

4.3.5 THE DEPARTMENT OF LABOUR AND ADVANCED EDUCATION

The Department of Labour and Advanced Education is responsible for occupational health and safety, public safety, and labour standards. They also administer the Volunteer Protection Act. Specific regulations you should be aware of include:

- The Occupational Health and Safety Act. This act requires employers to adhere to operational and employee safety standards. Information on the act, as well as a number of resources can be found <http://novascotia.ca/lae/healthandsafety/>. Note that, depending on the number of people you employ on a regular basis, you may require a written Occupational Health and Safety Policy.
- Employment rights with respect to minimum wage, vacation and holidays, employee/employer rights, etc. are governed by the Labour Standards Code. Information can be found at <http://novascotia.ca/lae/employmentrights/>.
- First Aid Regulations. There is a Guide to First Aid Regulations and other health and safety publications available at <http://novascotia.ca/lae/healthandsafety/pubs.asp>.
- Workplace Hazardous Materials Information [WHMIS] Regulations. A guide is available at <http://novascotia.ca/lae/healthandsafety/pubs.asp#whmiswhmis>. The Nova Scotia Tourism Human Resource Council offers an online WHMIS training program for the tourism sector. Check their website at www.tourismhrc.com for details.
- The Volunteer Protection Act covers issues around working with volunteers. This website (<http://novascotia.ca/lae/volunteerism/>) also provides links to a variety of resources concerning volunteers as well as a Volunteer Screening Guide.

4.3.6 DEPARTMENT OF TRANSPORTATION & INFRASTRUCTURE RENEWAL: HIGHWAY SIGNAGE

If your festival/event involves any activity (e.g. road race or fun run, parade, bikathon, etc.) on a public highway that is outside the boundary of an incorporated town or the urban core of Halifax Regional Municipality (HRM), you will need an On-Highway Event Permit from the Department of Transportation and Infrastructure Renewal (TIR). Application forms can be found at your regional TIR office and information is available on <http://www.novascotia.ca/sns/paal/trans/paal298.asp>. If the event is inside a town or the urban core of HRM, you can get the required permit from your local municipality.

As of January 2015 the provincial highway signage rules are:

- If you want to install advertising signs for the festival/special event on the secondary highway system a 'Working Within Right-of-Way Permit' is required. This permit is available from the local TIR office at no cost.
- A municipality may have a By-Law regulating advertising signs within the right-of-way on a provincially-owned road; check with your municipality.
- Erecting private advertising signage on the Provincial 100 Series Control of Access Highway system requires a 1000 metre off-set distance from the centre line of the highway.

Currently there are no advertising regulations for Nova Scotia's Secondary Highway system, although there is a review of the regulations on-going.

If your festival site is adjacent to a provincial highway, you should also consult with the TIR regarding traffic flow, turning, etc. You may also want to consider obtaining the assistance of the RCMP in managing traffic, particularly if you are expecting large crowds.

FESTIVAL AND EVENT SIGNAGE TAGS

There is a program that allows for temporary signage for festivals and special events on the 100 Series Control of Access Highways upon approval from the Department of Transportation and Infrastructure Renewal and Tourism Nova Scotia. There are established criteria for participation in this program, including:

- Festivals and events must run on an annual basis.
- They must run for not less than two days and no longer than 6 months.
- They must have potential to attract 10,000 or more visitors, with most being from outside the local area.
- They must be promoted through Tourism Nova Scotia programs such as novascotia.com.
- They must provide visitor orientation as well as on-site visitor amenities such as washrooms, first aid, etc.

If approval is given then TIR is involved with the manufacture of the signs. There is a cost for these signs, \$1,200 at the time this manual was written. The festival/special event organizing association is responsible for the installation/removal and storage of their signs. Signs are to be installed 2-3 weeks prior to and removed within 1 week after the event is over.

4.3.7 TOURISM NOVA SCOTIA

Tourism Nova Scotia is responsible for the Tourism Accommodations Act which includes campgrounds. If you are planning a temporary camping area as part of your festival, you will require a Special Event Camping Area Licence. There are requirements, such as the number of toilet facilities to be provided and spacing for access roads. Details can be found at http://www.novascotia.ca/just/regulations/regs/touracc.htm#TOC1_6.

4.3.8 DEPARTMENT OF NATURAL RESOURCES

If you are planning open fires or campfires as part of your festival, you may require a permit from the Department of Natural Resources. Contact your regional DNR office for information.

4.3.9 DEPARTMENT OF THE ENVIRONMENT

There are regulations in place governing the testing and monitoring of drinking water on a regular basis. Check with the Department of Environment (<http://novascotia.ca/nse/>) to determine if your festival/event is responsible for any of these regulations.

4.4 FEDERAL REGULATIONS

PERSONAL INFORMATION PROTECTION AND ELECTRONIC DOCUMENTS ACT

This federal government act (Personal Information Protection and Electronic Documents Act (PIPED)) applies to all organizations and relates to personal information collected and stored through the course of normal business activities.

The primary purpose of the Act is to ensure that the privacy of individual consumers is respected in that any personal information, including that relating to age, name, income, social status and credit records, is used for legitimate commercial purposes only and is stored or maintained in a secure fashion.

You should have in-house policies and procedures relating to the retention and use of personal information that you collect. Check out the Privacy Commissioner of Canada website (<https://www.priv.gc.ca/>) for detailed information and advice.

ANTI SPAM LEGISLATION

Canada's anti-spam legislation (CASL) came into effect July 1, 2014. Make sure you check out the requirements (<http://fightspam.gc.ca/eic/site/030.nsf/eng/home#ic-subnav-1>), particularly if:

- You use email, SMS, social media or instant messaging to send commercial or promotional information about your organization to customers or prospects.
- You install software programs on people's computers or mobile devices.

4.5 NOVA SCOTIA REGISTRY OF JOINT STOCKS

INCORPORATING A NON-PROFIT SOCIETY

Nova Scotia's Registry of Joint Stocks provides Society Incorporation and Registration. A society is a non-profit organization which has been incorporated under the Societies Act. This is not mandatory, however, the benefits of incorporation such as limited liabilities for members, make it highly desirable. It is a requirement for obtaining funding through provincial and federal departments and for entering into contracts.

Any five or more persons wishing to incorporate as a non-profit society may do so. A society incorporated under the Societies Act is a corporate entity separate and apart from the members, with the power to hold property and carry out objects set out in a Memorandum of Association.

Before applying for incorporation, you must choose and reserve a name. The Registry of Joint Stocks website (<http://www.novascotia.ca/sns/paal/rjs/paal268.asp>) provides information on the registration process and reserving a name. Once you are a Registered Society, an annual fee is charged to maintain registration, and you must also submit annual financial statements and a listing of board members.

REGISTERING A FOR-PROFIT BUSINESS

If your festival/event is operating as a for-profit business, you are required to register as a business with the Nova Scotia Registry of Joint Stock Companies. For details on registering businesses, and on different types of business structures, check out their website at <http://www.novascotia.ca/sns/access/business/registry-joint-stock-companies.asp>.

4.6 CANADA REVENUE AGENCY

You will require a business number (BN) if you are going to be collecting HST or paying wages/salaries and making employee tax remittances, and also for some licences and permits. This is a common identifier to simplify dealings with government at both the federal and provincial level. Your business number also forms the basis for your HST and payroll numbers. Nova Scotia uses the BN for services such as licences, permits, registrations and Worker's Compensation Insurance.

The BN is provided to Nova Scotia businesses when they register with the Registry of Joint Stocks. Find out more information at <http://www.novascotia.ca/sns/access/business/one-business-one-number.asp>. This site also has links to the Federal Government sites for HST and payroll registration.

HARMONIZED SALES TAX (HST)

The HST is a value-added tax (15% at the time this guide was prepared). You have to register for HST if you provide taxable supplies (e.g. admission tickets) in Canada and you are not a small supplier. Non-profit organizations (there are conditions that define these for GST/HST purposes) are considered small suppliers if “its total revenues from taxable supplies are \$50,000 or less in a single calendar quarter and in the previous four consecutive calendar quarters”.¹

¹ Canada Revenue Agency, *GST/HST Information for Non-Profit Organizations*, page 9. Found at <http://www.cra-arc.gc.ca/E/pub/gp/rc4081/rc4081-13e.pdf>

If your festival/event is a private business, you are required to register for HST if your sales are \$30,000 or more in a calendar quarter and over the last four consecutive quarters.

Even if you are not required to, you may wish to voluntarily register for and collect the HST. The advantage of doing this is that you can claim an input tax credit to recover the HST you pay on expenses and purchases used for the festival/event.

Once you are registered, HST will apply to most goods and services that you supply. Check out the document, *'GST/HST Information for Non-Profit Organizations'* (available at <http://www.cra-arc.gc.ca/E/pub/gp/rc4081/README.html>) for details and contacts for additional information. It's important that you understand the HST rules.

We strongly recommend you contact the Canada Revenue Agency directly, and/or obtain professional advice on tax related questions.

Helpful Tips: HST Claims

Remember, if you are registered for the HST and you collect it on ticket sales, you need to set aside and remit the HST collected minus any eligible input credits.

Often, HST is included in the price of admissions tickets so you will need to 'back it out' of your ticket sales. Make sure you remember this in your budgeting.

Your HST remittance could be a significant amount of money – make sure you set it aside as you collect the revenue.

When you register your festival/event with the Registry of Joint Stock Companies (see 4.5 above) you will see information on registering for the HST.

EMPLOYMENT TAXES

As an employer, you are responsible for deducting income tax, Canada Pension Plan (CPP) contributions, and Employment Insurance (EI) premiums from the wages and salaries you pay your employees. You are also responsible for remitting these amounts on a monthly basis to the Receiver General for Canada, along with your share of CPP contributions and EI premiums that you pay throughout the year on your employees' behalf. You are also required to report these amounts on an annual information return and prepare annual T4 information slips for your employees. These regulations apply to any organization that is an employer, whether it is a for-profit or a not-for-profit organization. They also apply if you employ people for only very short periods of time.

The Canada Revenue Agency is responsible for ensuring these requirements are met. The department handles enforcement and some collection activities related to payroll deductions, prepares the Payroll Deduction Tables used by employers for calculating deductions, and determines employee insurable earnings for Employment Insurance and pensionable employment for the Canada Pension Plan.

Everything you need to know about taxes can be found on the Nova Scotia Department of Finance website, including links to the HST and employee taxes: <http://novascotia.ca/sns/access/business/what-do-i-need-to-know-about-taxes.asp>

4.7 NOVA SCOTIA WORKERS' COMPENSATION

Under the Nova Scotia Workers' Compensation Act, various industries are required to pay for compensation coverage to protect employees from income loss and medical expenses resulting from job-related injuries. Your festival may be required to pay Worker's Compensation under the Act. If so, you will be required to pay a premium based on the dollar value of wages you pay your employees. If you have three employees or fewer, you may be exempt from this regulation.

Contact the Nova Scotia Workers' Compensation Board (<http://www.wcb.ns.ca/>) for additional information.

CHAPTER 5: DOLLARS AND CENTS

Key to success at any festival is careful attention to the organization's money matters – earned revenues, fundraising, financial security, financial controls and budgeting

CHAPTER MODULES

- 5.1 Revenue Generation (page 27)
- 5.2 Budgeting (page 31)
- 5.3 Procedures and Controls (page 33)

Key Takeaways

- ❖ Festivals can earn money from tickets or gate admissions, parking fees, on-site sales of food, beverage or merchandise. It requires some work to figure out how much you can earn.
- ❖ A detailed budget covering all anticipated revenues and costs is critical. Spend the time needed to build a good budget. It's better to be conservative, not optimistic, in your budgeting.
- ❖ Like any business, a festival needs financial procedures and controls.

5.1 REVENUE GENERATION

Festivals are created for a variety of reasons. While many are non-profit, others are created solely to make money. Most often the event is based on someone's vision and passion, and making money is secondary. No matter their reason for being, all festivals need to have revenues so that they can, at the very least, break even.

GATED OR NON-GATED EVENT

A 'gated' event charges for entrance and a 'non-gated' event does not. This may come as a surprise, but both can earn revenue. A gated event can cover its entertainment and programming costs from admission fees, while a non-gated festival needs to do so by charging admission to particular entertainment programs. This requires a gated system for the entertainment venue itself.

The absence of an admission charge is likely to result in more attendance and multiple visits by individuals. This will drive concession revenues higher, allowing the festival to be more aggressive in contract negotiations with concessionaires. It also provides a basis for being more aggressive with sponsors since the audience size will be larger.

TICKET SALES PLAN

Engage a ticket booking company such as eTixNow, Ticket Atlantic, Ticket Pro, Eventbrite, Brown Paper Ticketing, etc. so that people can easily purchase tickets in advance. This gives the responsibility of distributing tickets to the ticket broker. Remember, whatever price you decide to sell your tickets for, these companies will add their fees which will drive up your ticket price. However, it's a staffing savings and gives you an easy tracking system. You can watch daily reports to see how well your ticket sales are doing and which of your marketing activities are working the best. This will allow you to make promotional decisions and react quickly.

Helpful Tips: Ticketing

If you have a festival with assigned seating at one or more venues, you can't sell a 'festival pass'. You will need to sell individual tickets, at least for that performance.

If you have multiple venues with assigned seating (like Celtic Colours International), you will have different capacities and seating plans for each venue.

This means you will need to be very careful with your ticketing procedures and tracking sales.

On-site box office sales are labour intensive and require infrastructure such as booths, cash management, equipment for debit and credit cards, along with managing who is coming and going. There is also the security risk with large sums of cash on-hand.

If your event is ungated (free to attend) but you want to track and limit the number of people who can attend, there are various on-line programs (like EventBrite) that will allow people to 'reserve their seat' for an event. Keep in mind approximately 30% of people who apply for a free event will not attend, so providing an overage of tickets available may be something worth considering.

ADMISSIONS AND PRICING

Doing a comparison of similar events and their pricing schemes is a good start in setting your admission fees. You will see that some events charge a 'one size fits all' admission and others create many levels and categories. Some categories to consider:

- weekday price
- weekend price
- festival pass (access to all programming, any day)
- one-day fee
- adults
- seniors
- child (5-12 years)
- under 5 (generally free)
- university student

- family rate
- school groups
- include or not include concerts and other programming in admissions
- tour group price
- corporate rates for employees
- sponsor rate for employees
- day-only or evening-only rates
- care-giver for handicapped person
- special rate for certain groups (i.e. firefighters)
- VIP area seating

Be careful not to overcharge, or to undercharge. Look at your costs and your estimates of attendance to help with this analysis.

SPECIAL EVENT OR ENTERTAINMENT SURCHARGES

On top of any other fees, you could also charge visitors an additional fee to see a special entertainer or participate in special programming. Examples would include a concert by a major performer, or attending an autograph session with National Hockey League stars.

PARKING FEES

Parking fees are usually kept fairly low, particularly for gated events. These are collected either as a set fee or through donations. Sometimes a local service club coordinates the parking and the fees collected will go to that group. Other times, an event is held on municipal or private land and the fees collected for parking are set and kept by the municipality or organization that owns the land.

As mentioned earlier, make sure that the signage leading to the parking is clear that there is a fee or that a donation is being requested. Drivers will want to make the decision to pay or look for free parking well in advance of the parking gate. No matter how much planning you do, you will still need to have some space for visitors to turn around to look for free parking because they did not notice the signs.

BEER AND ALCOHOL SALES

It can be very difficult for a festival to make money (or just break-even) through beer and alcohol sales. The costs have become prohibitive and the list of expenses associated with running a beer tent is extensive.

Helpful Tips: Forecasting Revenues

Forecast ticket sales moderately – too low and revenues from this source may result in potential funders think the event is not worth hosting; too high can look good on the budget sheet but be unrealistic.

Never overshoot in your revenue estimates; always undershoot so you are never caught with a financial surprise.

Try to cover the costs of your event with your funding and sponsorships, this way ticket sales will be your profit.

Don't forget – your goal is to get the most people at your event and give them the best experience possible. A lower price may bring in more bodies – and you could make up the money in sponsorships or sales. Be creative!

What looks easy and obvious is not. Inventory management is difficult and often the transactions are cash. There are also regulatory and liability issues to consider.

However, if diligently managed, a beer tent can generate some revenues. One way to guarantee revenue is to charge a company a flat fee to operate it as a turnkey. It is then their responsibility to have the correct licenses, staff, insurance, transaction machines and entertainment costs covered. You merely agree on a fair price and chalk it up to revenue without the worries.

Another route is engaging a group such as the Rotary Club for a combination of flat fee and profit sharing.

It can be different for an indoor venue. Many venues today manage all liquor sales; you might be able to negotiate with management for a small amount per drink or ounce. At some venues, you could get the licence and run the bar, use volunteers to run the bar (make sure they have the necessary skills and required training), and hopefully make a profit.

RETAIL AND FOOD VENDOR SALES

Small festivals often depend on the revenues generated by vendors. There are many ways to negotiate with local vendors, but the best way is to agree on a flat fee. Percentages rely too much on trust and the festival knowing the vendors' business. It is best to agree to a fee, support the vendor to make as many sales as possible and everyone wins along with the promise of the vendor returning the next year which will ultimately save you time in recruiting new vendors. Happy vendors will tell others and your concessions will grow.

Selling souvenir merchandise for revenues/profits is another difficult category unless diligently managed. Under order stock during your first years until you ascertain demand. You will find that all staff, friends of staff and relatives suddenly feel entitled to a t-shirt or sweatshirt and express that they want one, but not to the degree that they will buy one.

Please refer to Chapter 8.3, Vendors, for more information

PRODUCT SAMPLING

This is usually a corporate company looking to give out samples to their target markets. A flat fee is necessary. Although it might be a large national company, they have limits to what they will pay in order to be on-site giving out their product. Sometimes a good agreement consists of both a cash fee and a contribution of product if, for example, they are giving out food samples. It may go towards feeding volunteers.

Keep the number of samplers reasonable and try not to overwhelm your attendees. Be careful that those giving out food or drink samples do not infringe on vendors who paid a fee to sell their product. A free give-away product near a vendor trying to sell something equals problems for all.

If there is wine or other alcohol sampling on-site, you will have to work with the vendors and the venue to ensure that the proper licences are in place.

CORPORATE FUNCTIONS

Your festival could play host to a corporate function either outside of or during festival hours. Many festivals set up a separate area with a tent, tables, chairs, portable toilets, and hospitality service. Corporations book and pay a fee for this space and they can then send out special invitations to clients and/or employees for a networking opportunity, or a chance to say thank-you. This concept could also be used as a sponsorship benefit.

5.2 BUDGETING

Having a sound and realistic budget before you get too far along in the process is critical. And you will need financial management tools. The list includes:

- Capital budget
- Operational budget
- Working capital and a cash flow schedule
- Procedures and controls, including tracking

CAPITAL BUDGET

For start-up events, you will need a capital budget separate from your operational budget. If you have been operating for several years, you likely have all the capital items already.

The capital budget covers the one-time investment in your organization's long-term structure (e.g. office space, photocopier/printers, office furniture). Many festivals or events operate out of 'home offices', especially for the first few years. This eliminates most capital costs.

If you do have an office for your first year or so, you may want to hold off investing in these costs to keep your expenditures low. This may be an opportunity for an in-kind donation from a sponsor, for example for office space and supplies should they be required. In the end, it is inevitable that some capital assets will have to be purchased.

Management and the board of directors will need to decide where the money will come from to pay these capital expenses.

Use Worksheet 1 below for your capital budget. It's always a good idea to include a contingency amount to cover unanticipated costs.

Worksheet 1 Sample Capital Budget

Capital Item	Projected	Actual	Variance
Buildings & Renovations			
Machinery & Equipment			
Furniture & Fixtures			
Transportation equipment			
Other Supplies			
Other Equipment			
Subtotal			
Contingency			
TOTAL CAPITAL BUDGET			

OPERATING BUDGET

The operating budget is the money it will take to produce the event itself.

An operating budget is very fluid and detailed. It can be easy to say, “Oh that’s only \$25, not worth a line item”. But you do that a few times over a year and suddenly that \$25 is \$1000. No expense is too small to include. It may not need its own line, but should be included under ‘Misc. office expenses’ or ‘Misc. travel’. Include a contingency in your operating budget as well.

Be sure to have someone handling the budget who is knowledgeable in revenue, expenses and payroll. Recording incoming revenue and what that revenue is earmarked for is just as important as where the money is being spent.

Being open and financially transparent with your board of directors and government funders is imperative. The last thing you want is to have anyone question where the money went when your event is over. Don’t be afraid to pay yourself or your front line team, just be sure that the board is aware of these salaries before the event begins so everyone is on the same page. Having a clear and detailed proposed budget lets everyone know the scope of the event’s finances.

Get the Right Help

“Get someone who knows numbers and knows how budgets work. This is a crucial role – making sure there is transparency in your budgets and that you won’t go into debt. Just like in a play, everyone has a role in your financing, whether its ticket sales, beer and/or merchandise sales, government and/or sponsors. Make sure you explore each and every one of these avenues to the fullest. Creating relationships and partnerships is the backbone of your success”

**Daniel LeBlanc, Artistic Director
Festival acadien de Clare**

Today’s computer software makes it easy to develop and track budgets, and compare actuals to budgets.

Worksheet #2 is a template for a basic operating budget outlining items to be considered when planning your budget, and when tracking where you are at with the budget. A more detailed operations budget can be found in Appendix 1.

WORKING CAPITAL, CASH FLOW AND TRACKING

Break the capital and operational budget into a schedule of when each purchase needs to take place and when revenues might be expected to be available to cover them. This will tell you if you will have the cash on-hand to pay anticipated expenses in a reasonable timeframe, or whether you will need to arrange some financing or working capital.

Hopefully, partners and/or sponsors will be able to contribute some funds for working capital. Or, you may need to arrange for a line of credit from a bank to supplement the cash you have on hand. Having access to a couple of credit cards could be helpful as well.

As planning proceeds and the event nears, it's important to regularly update the budgets to keep them realistic and to indicate any looming issues, such as potential shortfalls in cash.

5.3 PROCEDURES AND CONTROLS

It's important to have one or two people, and only one or two, in charge of keeping track of the cash flow and handling payments (with monitoring by the board of directors). Too many people involved can make controlling and tracking expenditures difficult.

The flow of sponsor and government revenues along with merchant and/or ticket sales needs to be closely monitored by management. Similarly, operational expenses need to be carefully monitored and tracked against the budgets so as not to run a deficit.

As with a business, the festival will need basic financial administration and control systems in place, as follows:

- Accounting – revenues, receivables, payables, disbursements, general ledger, income statement, balance sheet and cash flow statement
- Purchasing and approvals
- Inventory control
- Payroll
- Cash control and deposits

Worksheet 2

Proposed Event Budget – Simple

	Projected	To date	Variance
INCOME			
Government Funding			
Grants/Trusts/Foundations			
Sponsorship			
Ticket Sales / Admissions			
Food & Beverage			
Other income			
TOTAL INCOME			
EXPENSES			
Administration			
General Administration			
General Insurance			
Staff Salaries & Fees			
Management Fees (If Applicable)			
Other Administration Expenses			
Subtotal Administration			
Event Costs			
Facility / Venue			
Production			
Insurance and Permits			
Entertainment / Artistic Program (fees, travel, accommodations)			
Other Event Expenses			
Subtotal Event Costs			
Marketing & Promotion Expenses			
Advertising / Design / Print			
Internet & Digital Media			
Media Relations & PR			
Subtotal Marketing & Promotions			
Subtotal Marketing & Promotion			
Contingency			
TOTAL EXPENSES			
SURPLUS / DEFICIT			

CHAPTER 6: PARTNERS AND SPONSORS

Sponsorship programs are increasingly important to the financial success of festivals. They are an exchange – you offer something of value to the sponsor and they give you something in exchange – money, services and/or in-kind donations.

CHAPTER MODULES

- 6.1 Community and Local Business Support (page 35)
- 6.2 Government Funding (page 36)
- 6.3 Sponsorships (page 38)
- 6.4 Tourism and Community Partners (page 42)

Key Takeaways

- ❖ Mobilize your community support and your board members to help.
- ❖ There are some government programs that you could be eligible for; you will need to do some digging around and talk to other festivals.
- ❖ Sponsorships are key. You must first understand what you might have to offer potential sponsors. Then do the research, first to identify possible sponsors and then to learn about them and how they might ‘fit’ with your festival.
- ❖ In-person initial meetings with potential sponsors are critical. Then follow up with an offer that builds on what you learned.
- ❖ Don’t forget to follow-up with sponsors with results after the event.

6.1 COMMUNITY AND LOCAL BUSINESS SUPPORT

If you have been able to build a strong network of support within your community for the festival project, you should be able to mobilize this support toward fundraising efforts.

When developing your community sponsorship plans, remember that you can also target in-kind contributions as well as cash. There may be local companies and individuals who are unable to donate cash but are able and willing to donate materials, supplies and services.

You may want to consider on-line Crowdsourcing as a way to engage the public in supporting your event. You can find information on Crowdsourcing in Canada at <http://ncfacanada.org/crowdsourcing-equity-crowdfunding-faq-in-canada/>

You should establish a separate sponsorship committee, since it is often a major task in the planning for a festival. Make sure you have a clear vision of what you are trying to accomplish. Sponsorship is addressed in detail later in this chapter.

6.2 GOVERNMENT FUNDING

Government funding programs change frequently, with new programs added and changes made in program guidelines on a regular basis. Generally, there are only limited programs that are applicable to festivals.

If you are seeking government funding support for your festival or event, pay careful attention to the program goals and expectations. For example, if your festival is targeting tourism markets make sure you are familiar with the provincial tourism strategy and the criteria for assistance – look at the Tourism Nova Scotia website <http://tourismns.ca/festivals-and-events> and tailor your festival to meet their expectations.

The following are potential sources of festival/event funding at the time this guide was prepared:

- Events Nova Scotia is a ‘one-stop shop’ for significant and major events. They can provide support of various kinds to these types of events, including help with bidding on and attracting major events. Contact Events Nova Scotia to discuss event funding and requests for funding for events from the Province of Nova Scotia. Events that fit their definition are described later in Chapter 11. More information on Events Nova Scotia and their assessment criteria can also be found in Chapter 11, Major Events and on their website <http://eventsnovascotia.com/>.
- Tourism Nova Scotia (TNS) can provide assistance through their Festival and Event Marketing Program (up to \$3,000 in 2015) to festivals that have the ability to influence and motivate travel. Festivals must be open to the general public and welcoming to visitors. Permanent attractions that run all year or season, community targeted events such as yard sales and courses or workshops that are not designed for visitors are not eligible. Eligibility guidelines and application forms can be found at <http://tourismns.ca/tourism-marketing-programs>. Festivals and events can also register with TNS for complimentary listings on novascotia.com and exposure through various tourism marketing channels. This is discussed in Chapter 12.7.
- The Nova Scotia Department of Communities Culture and Heritage has a number of programs that can potentially provide funding to festivals. Check out <http://cch.novascotia.ca/investing-in-our-future>.
- Canadian Heritage is a Federal department that provides funding for festivals through its Canada Arts Presentation Fund (CAPF). To qualify, festivals must be major events, be more than two days in

duration, present professional artists from more than one province and have been operating for more than two years. Check out <http://www.pch.gc.ca/eng/1267553110077/1268404392232;%201296567586091>

- In 2014 a new program between the Federal and Provincial Government was created to encourage businesses to invest in local events through a sponsorship matching fund program called ArtsVest <http://www.artsvest.com/nova-scotia/>. This program will match up to \$5,000 towards a new sponsor.
- Festivals that present music as part of their program are required to pay SOCAN (Society of Composers, Authors and Music Publishers of Canada) fees. They can, however, apply to the SOCAN foundation for funding. Visit the web site to learn more about their programs <http://www.socanfoundation.ca/>.
- The Canada Council, another federal agency, has programs that fund festivals. The Music Festival Programming Project program provides funding for organizations to do special programming projects. The Council can also provide tour and travel funding to artists to get to festivals. Their web site is <http://www.canadacouncil.ca>.
- Your local/regional municipality may have some funding sources.

When approaching public sector departments/agencies for funding support, prepare a proposal that includes:

- Objectives and rationale for your festival, including your vision, mission and goals.
- Description of the overall concept. If you have some, include some photos from the festival – a picture is worth a thousand words!
- List of target markets and, if you have the data, a profile of your current audience.
- Budgets and proposed sources of capital and operational funding.
- Operating revenues and costs, cash flow and working capital.
- Organizational structure: board, management, staffing, and partners.
- Potential sponsors.
- Marketing plan.
- Projected tourism and economic impacts.

Specific criteria and application guidelines can be found on the various department/agency websites.

You will find that the government funding partners will expect you to come up with a portion of the budget from non-public sources, either through corporate or community donations, ticket sales or other fundraising initiatives. These contributions can include both cash and in-kind revenues, but some portion of cash is usually required.

6.3 SPONSORSHIPS

With increasing cutbacks in public sector funding, many festivals and events rely on sponsorship programs as a means of raising capital and operating funds for their event. There is strong competition for sponsorship dollars so you will need to develop your sponsorship program carefully. Professional advice on this would be most valuable. If your festival is a large one and you are seeking extensive sponsorships, it may be worth contracting a professional fundraising group.

Having the right people on your board of directors can help a lot with attracting sponsors. Look for board members with good connections in the community and corporate sector and get them to facilitate introductions and open doors for you.

UNDERSTAND WHAT YOU HAVE TO OFFER

Before you set out to sell sponsorships, you must understand what you have to offer. You must be able to articulate and clearly identify the value your event has to offer a potential sponsor.

- Who is your target market?
- What skills does your team bring to the event, project and promotional acumen?
- Does your audience align with the mission and business priorities of the sponsor you are approaching?
- What can your potential sponsor hope to achieve by partnering with you?
- Look at each line item in your budget and think about whether anything can be offset by a sponsor – through cash or a service such as hotel rooms or car rentals or a combination of cash or in-kind contributions. Figure out how much in cash contributions you will need to succeed.
- Break down the amounts you will be asking for and what the sponsor in each price bracket will receive - remembering that this will be negotiable and you may want to add something after listening to their target goals.

IDENTIFYING AND CLOSING SPONSOR OPPORTUNITIES

Here's an outline of a process that will help you identify and close sponsor opportunities.

STEP 1: RESEARCH

Research other similar festivals/events. Pay close attention to their sponsors and partners especially if you are a niche festival/event. Their partners may suggest some opportunities for you. Use their sponsorship packages as a template for identifying sponsorship opportunities. Think about which of the following you can offer:

- Logo Exposure (where and how?)
- Naming rights (Festival, stages, rooms, workshops)
- Tickets for clients/staff
- On-site activation/Sampling
- Hosting and VIP opportunities
- Speaking opportunities

- Banners and signage
- Handouts
- Inclusions in guest packages
- Promotion print/radio/social media
- Contesting opportunities
- Discounts
- Website and social media coverage
- Souvenir program ad placement
- Networking opportunities; a chance to meet other corporate leaders; an opportunity to meet the Mayor or other important government representatives; a perk for their suppliers or employees.
- A beer or other beverage sponsor could be awarded ‘pouring rights’ and then the festival would only serve a certain brand of their product.

Some sponsors want the opportunity to speak on stage or introduce a performer; they want to be acknowledged and given an opportunity to speak at any press conferences or receptions (especially when there is media in attendance). They are looking for that special item or programming element that will set them apart from other sponsors.

The key thing to remember is that sponsorship is an exchange ... they give you something and you give them something back – it’s a win-win.

STEP 2: IDENTIFY POTENTIAL SPONSOR PROSPECTS

With the assistance of your board of directors and your team, identify potential groups of sponsors:

- a) In-kind
- b) Major sponsors with a larger cash contribution
- c) Smaller cash sponsors
- d) Combination sponsors

With tough economic times and competition, sponsorships must be a win for both the event and the sponsor. Once you identify potential businesses, make a list of why they would be a good fit. Consider the following:

- Who else has the business sponsored in the past?
- Do they have a policy regarding sponsorship and community relations on their website that will give you an idea of their key corporate interests?
- What is their target market? Will your event target a similar market?
- Is there a connection to your festival/event? Do you align with their mission?
- What can the company contribute over and above money (i.e. in-kind support)?
- Who has the authority in the company to make the final decisions?

Sponsorship

“Sponsorship is an exchange between your festival and the sponsoring organization; it is not a gift. You are offering the sponsor the opportunity to gain from your event while you gain from the money or services they provide. Don’t tell the potential sponsor what you can give them; instead, focus on how you can help them meet their needs. A standard list of benefits at various levels will not accomplish that. Do your research and make sure what you are offering is clearly aligned with their corporate mission.”

**Joella Foulds, Executive Director
Celtic Colours International Festival
Cape Breton**

- Does someone on your board of directors know someone at the company?

STEP 3: SET UP A SPONSORSHIP CONTACT SPREADSHEET

This becomes your sponsorship ‘bible’, to work from for the current year’s events and to keep notes for years to come. For example, sponsors who may say no to you this time but might develop an interest once they see the event (i.e. they want to know it is going to be a success before they will commit). You will want to approach them as soon as the event is over to get the ball rolling for the next year. Speak of your successes at that time. The spreadsheet will also help you track progress and follow up.

Helpful Tips: Possible Sponsors

Court the potential big sponsors for the first edition of your festival. Invite them to attend as your guests so that they experience the event first-hand. Their experience and understanding of what you are doing will make them a much easier sell for next year.

If you have multiple people accessing this information, set it up as a Google Doc (or something similar). This way you can track changes as a group and have a fluid document to work from.

STEP 4: CREATE A SPONSORSHIP PACKAGE

Once all of these items have been thoroughly researched, it’s time to create a general sponsorship package with various levels and recognition opportunities. Make sure it is flexible.

Attached in Appendix 2 is a sponsorship recognition chart that may help in keeping track of various levels of support and what those sponsors can expect in return.

Sponsorship – Meet in Person

“It’s very important to have that initial meeting with a potential new sponsor in person. I can’t stress this enough. Once they hear about your event first-hand and see your obvious passion and excitement for it, then and only then, do you have the foundation to actually start the real conversation.”

**Lia Rinaldo, Managing Director
Devour! The Food Film Fest
Wolfville**

STEP 5: APPROACH THE SPONSOR PROSPECTS

Don’t cold call potential sponsors; you need to do your research first and then meet in person. The goal of this initial meeting is to find out what is important to the potential sponsor. Is it logo exposure? Is it an event they’d like their staff to be part of? Is it a cause they are close to? Have an excellent understanding of their company before you meet.

Make an **appointment** with the person who has the authority to seal a deal. You do not want it to get watered down or misrepresented by a middle person.

Take your sponsorship package to the meeting, informing the prospective sponsor that it is an outline of what can be offered but that you are open to working on a partnership that works best for them.

Listen and ask questions – the key here is to understand your potential sponsor. This meeting will be more of a fact-finding mission. YOU want to find out what the sponsor is interested in in terms of their community involvement and THEM to find out about the event and your vision. Let them know you are willing to work with them and tailor a proposal that fits their marketing/community engagement goals.

If the prospect is interested, follow up after the meeting with a formal proposal (see Step 6 below) that takes into consideration what was discussed in the meeting. The sponsor may come back wanting to tweak, but it gives them an idea of what the event can offer.

Keep in mind that this face-to-face approach is essential for the larger, higher end sponsorship asks. For the smaller \$1,000 - \$3,000 levels, the face-to face approach is also best; in fact you may find that smaller local sponsors require more hand-holding. On the other hand, an introductory phone call and a generic sponsor package offering various levels of support may be all that is required for some smaller sponsors.

STEP 6: BUILD THE SPONSORSHIP PROPOSAL

Once the pieces of the puzzle start to come together, you should have established:

- The sponsor's marketing objectives
- Your ability to meet the objectives (and provide extras)
- Agreement as to what success looks like to them i.e. what measurable they want to see

You must now ascertain at what level to pitch them.

If you go in at a level that is too high, often sponsors will simply say 'no thank you, it's not in our budget' without giving you a chance to scale back your offering or your cash contribution requirement. Be cautious the first year – under-promise and over-deliver.

Prepare a sponsorship proposal for each of the higher end prospects. Keep it limited to a few paragraphs explaining the event. Use bullet points for easy reading so the client can skim through to see if you press all of their buttons, some of them or most of them. A potential sponsor should be able to come away without having to work too hard to understand exactly what is in it for them.

Make sure to cover:

- The Sponsorship Opportunity - Who you are. What you are selling and how you will be a good partner for them and a good fit for their company (use visuals - logos and any photos are helpful in lieu of too much writing).
- How you are unique. How your event is different from others OR how it is the same as others that have been successful, how they were successful and why the formula works and is a fit for your community. The history of successes of the same kind of events makes for a compelling sales pitch and the proof is already out there.

Helpful Tips

Follow-up within 24 hours!
Thank them for their time; let them know they can expect something from you and when it will be sent.

STEP 7: CLOSE THE DEAL

Once you get a yes, be sure to follow up with a contract. This will ensure that the sponsor, as well as you, is aware of each other's expectations. Before putting together a final contract, it's a good idea to send a follow up email outlining what had been discussed at the meeting and your understanding of the terms and conditions.

STEWARDSHIP

Once you get a yes, your obligation does not stop there. It's critical that your team ensures that the sponsors receive all the benefits agreed upon. Your sponsorship person is tasked with following up with the sponsor to be sure all logos, print ads and materials have been received before the promotion of the event takes place.

During the event be sure to stop by the sponsors' tent or VIP reception to check in and see how things are going. Call their marketing people to discuss sharing on-line promotion posts.

After the festival you or a board member must follow up with a phone call to thank the sponsor for their support and ask how they felt it went. Find out what you could do better and if they are interested in returning the following year.

Once you have attendance numbers, social media reach and other measurables, put together a short wrap-up report outlining the sponsor's involvement and their ROI (Return on Investment). Present this to them as soon as you can post-event, while it is still fresh in everyone's minds. This allows for constructive feedback. Outline ideas to engage them further the next year.

6.4 TOURISM AND COMMUNITY PARTNERS

Beyond sponsorships, you may be able to establish partnerships with the tourism operators in your area who stand to benefit directly from the festival. While a tourism operator may also become a sponsor, they may be prepared to work with the festival organization on various marketing and promotional activities.

As mentioned in Chapter 2, there may be opportunities to involve other community organizations as partners in some of the tasks involved in staging the festival, perhaps providing volunteers to assist with different functions. Examples might include traffic and parking control, on-site displays and programming, visitor information services, and so on. Where money is involved, some of it might be shared in return for the assistance.

Another part of working with your local tourism partners is building and marketing packages. A package is a collection of tourism products and services that are sold as a single product, in one transaction, at a single price. The idea behind packaging is to create and market a product that is customized for a particular target audience, or for a particular festival or even a particular element within a festival. Some tips on developing and marketing packages are provided in Chapter 12.8.

Working with Tourism Partners

“During sports events there are usually two types of visitors – participants and non-participants (spouses, significant others, families, etc.). Encourage the local tourism association to look at the event this way. The event organizers will be keeping the participants occupied most of the time. Tourism partners can provide packages, events, sales, tours, etc. to keep the non-participants occupied and happy. This also frees up your resources to focus on the event.”

Wayne Hamilton
2012-13 World Jr. A Challenge Society
Yarmouth

CHAPTER 7: THE PEOPLE

People – the board, committee members, management, staff and volunteers – make the festival happen.

CHAPTER MODULES

7.1 Leadership (page 44)

7.2 Board of Directors and Committees (page 45)

7.3 Management and Staffing (page 47)

7.4 Volunteers (page 50)

Key Takeaways

- ❖ Your festival needs strong leadership – from the board and from management, whether they are paid or volunteer.
- ❖ Volunteers are the back bone of your event. Recruit carefully, train and manage them, and recognize their help, regularly.
- ❖ Develop a Festival Manual – it should cover everything including policies and procedures, codes of conduct and a critical path schedule. In the festival business, success is in the details!

7.1 LEADERSHIP

Strong leadership is a critical element in successful festival development and operations.

Your leadership team should have the following skills and expertise:

- Vision – seeing what can be and taking action
- Passion – enthusiasm and drive in making it happen
- Team building – leading by example, competent and effective
- Communication – providing training, clear objectives, and delegating authority
- Connections/Expertise – the ability to make sponsorship connections within the business community

Good leaders have a combination of most of these characteristics, along with a careful balance of self-esteem and humility. They are good at getting people to buy into the vision and motivating them to help pursue it.

They provide an environment in which the people they are leading are inspired to achieve what is expected of them.

Find these people and put them in charge! Oh, and make sure they have expertise to know what needs doing.

7.2 BOARD OF DIRECTORS AND COMMITTEES

THE BOARD OF DIRECTORS

Festivals are usually started by people with a passion for an idea and their community. It's important to invite people onto the board who are not only visionaries, but bring a particular expertise needed to make a successful festival.

A board of directors is often established to oversee the direction, development and finances of a festival. They are hands-off in terms of daily management of the event. Festival organizers are obligated to provide regular updates to the board.

When looking for board members, seek out people who have senior management experience, financial oversight expertise and who have influence and contacts in the community.

Here are some other principles and tips to follow:

- Keep the board small - 10 persons or less. Large boards are less effective and limit the active participation of individual members.
- Identify key roles required by board members such as:
 - Treasurer
 - Lawyer
 - Marketing and promotions
 - Business connections
 - Connections with community and government stakeholders
- The board's mandate is the part of the overseer and they are not directly involved in daily management. Boards have the ultimate authority in terms of structure and finances, but must understand that management of the event is left to staff and volunteers.
- Board members should meet at least once a month in the beginning of a venture and more frequently as the event deadline gets closer. Ensure that board members are aware of the time commitment, number of meetings and volunteer work required outside of meetings.

- The board should focus its efforts on:
 - Setting policy, goals and objectives
 - Approving business plans and budget proposals
 - Considering and approving capital projects and other major expenditures
 - Monitoring performance and holding festival management accountable for results
 - Using the influence of its members to get funding, seek sponsors and represent the interests of the festival to the community.
- The board should not:
 - Interfere in operational matters under the authority of the festival management
 - Provide direction to staff other than the senior manager
 - Represent themselves individually as the voice of the enterprise (that's the role of the board as a whole, or the senior manager)
 - Publicly disagree with the management (disagreements should be dealt with around the board table.)

It will also be important that the board establishes an organizational structure and assigns responsibilities such as signing authorities, responsibility for contracting, etc. You need to make sure that you have appropriate policies in place early on. Make sure the board arranges director's insurance to protect them from liability. Get legal advice on this.

Your board may want to investigate taking a board governance-training program. These are available throughout the province at minimal cost. Check out the resources, training and other insights available through the Community Sector Council of Nova Scotia (<http://csc-ns.ca/about-our-sector/>), an organization dedicated to working with non-profit and voluntary organizations.

COMMITTEES

Depending on the scope of the event, the board may want to establish sub-committees to provide better direction and oversight to the most critical areas, for example:

- Programming/Artistic
- Sponsorship and Fundraising
- Government Funding
- Marketing and Media Relations
- Finance
- Volunteer Development
- Production and Logistics

For larger, more significant events some of these functions would be handled by management and staff, such as Programming/Artistic, Marketing, and Sponsorship.

7.3 MANAGEMENT AND STAFFING

Each event is different. Some have a small staff along with volunteers; others are solely volunteer-based. As event managers, it's your job to be clear on the work expectations and to provide the training and tools to do the job.

The various areas requiring management and staff include:

General Management:

- Planning and budgeting
- Personnel
- Accreditation
- General administration and overall supervision of each area of operation

Site Operations:

- Site management and maintenance
- Logistics and general operations, including set-up and tear-down
- Signage
- Parking
- Security

Festival Operations:

- Regular programming
- Concerts or other specialty programming
- Artist/performer liaison
- Stage management
- Technical production for staged entertainment/events
- Concessions
- Volunteer management

Partnerships:

- Sponsorship
- Fundraising
- Partner liaison

Promotion:

- Marketing and promotion
- Website
- Media relations
- Group sales
- Function reservations

It's All in the Details!

"For any festival or event, no matter the size, make sure you have some people on your organizing team that are absolutely detail oriented. Attention to detail is not a skill set that everyone has, so take care to find the right people for your team. And, if they don't have what it takes, bring in someone else. Having little details fall through the cracks can cause big problems."

Joella Foulds, Executive Director
Celtic Colours International Festival
Cape Breton

Guest services:

- Hospitality and visitor services
- Artist/performer hospitality
- VIP services

Finance and accounting:

- Box office/admissions
- Banking, cash control
- Accounting
- Management reports
- Payroll
- Purchasing
- Billing, collections and payments

At smaller events, many of these duties will be rolled into one or two people. At larger events, there may be a general manager, section managers, and staff as well as volunteers. It's definitely a better option to add more people later than to start with a top-heavy organization that gets bogged down in its own structure.

TRAINING

A lot of training for festival staff and volunteers can be done through orientation sessions held on-site a few days before the event. Some areas will need more in-depth training (for example, security staff and box office staff), and may have to occur over two or three sessions. Everyone will need training on radio use and etiquette, and cell phone use.

UNIFORMS AND OTHER IDENTIFIERS

Staff and volunteers need to have some sort of uniform or identifier. The uniform can be a unique festival t-shirt (preferably brightly coloured so they can be easily identified by audience and staff), festival cap or it could be just their accreditation (name sticker or badge lanyard).

If badge lanyards are being used, be sure to identify the role of the person. For example Volunteer, Transport, Security, Staff, Event Director, Performer Manager, Volunteer Manager, etc.

The identifier makes it clear to visitors where they can go for assistance. It is also an excellent way for staff and volunteers to identify each other in a crowd.

Security staff need some way to uniquely identify themselves, perhaps with a different colour festival t-shirt (one that is easily recognizable when it gets dark). Some festivals will print SECURITY on the back of the t-shirts; others will go with a less conspicuous FESTIVAL STAFF label.

CODE OF CONDUCT

Whether you call them policies, guidelines or rules of conduct, you will need some form of written document that outlines the festival's expectations of behaviour from staff and volunteers. It makes it easier on everyone to have expectations clearly stated at the beginning. As well, you have something to fall back on in the event that you need to fire or discipline a staff member or volunteer.

It's clearly a fine balance between being too preachy and demanding, and simply outlining your expectations for the best behaviour from each person as befitting your festival goals and objectives. As with any human behaviour, it is much easier to loosen the rules once they are in place than it is to try to apply restrictions after the fact.

THE FESTIVAL MANUAL

It is a good idea to put all of the foregoing information in a master manual ('the bible'), with copies provided to each working group as a reference document. It would contain at least the following:

- Overview and/or history of the festival
- A site plan
- A festival programme
- Rules and code of conduct
- Contact list
- Emergency plan / safety and emergency procedures to be followed
- Staff and volunteer job descriptions
- A separate document with specific policies and procedures for individual areas
- Meal provisions
- Parking for staff and volunteers
- Volunteer recognition party details
- Media relations policy
- All policies, procedures, working group roles and job descriptions
- A critical path schedule for all tasks necessary from the planning stage up to the event itself, throughout the event and post event activities as well. In the festival business, success is in the details! Code each task as a 'must have' or 'want to have', with emphasis given to the former.

Helpful Tip:

Rules of Conduct Points to Consider for Your Festival or Event

Staff and volunteers will:

- Treat all festival-goers as welcomed guests and be as positive, respectful and helpful as possible.
- Wear your accreditation and uniform when on duty.
- Receive a meal ticket for each four hours worked.
- Be scheduled to work at least two shifts of at least four hours each before being granted free access to the festival site off-duty (*more suited for a festival running for multiple days*).
- Have meals in the designated area for staff and volunteers when in uniform.
- Not wear your uniform and accreditation when visiting the festival site off-duty, and especially when drinking alcoholic beverages.
- Never drink alcoholic beverages on duty.
- Park in designated staff/volunteers area.
- Contact the general manager or designate in the case of any media enquiries; never give interviews or answer media questions ... Always politely refer them to the general manager.
- Never smoke in uniform.

Design the manual so it can also be used to record dates of completion of tasks, along with comments designed to assist planning for the next festival year.

7.4 VOLUNTEERS

Volunteers are the backbone of every event. They come with a variety of experience, talent, and dedication. Recruiting volunteers for a new event can be a challenge. It's important to ensure they are taken care of and not overworked. Ask yourself these questions:

- Will people want to volunteer for this festival?
- What's in it for them?
- What job satisfaction will they get?
- What rewards will they receive? (and it should be more than a T-shirt)
- Will they be able to progress from year to year?

VOLUNTEER MANAGEMENT

Having a Volunteer Manager is imperative no matter if you have a handful of volunteers or hundreds.

Volunteers working shifts is much like employing paid personnel. They need to be given the same level of care and support, if not more so. Volunteers will need to know how they are doing, who to go to for information and assistance, and where to find the tools and resources they require. They will want to feel 'in the loop' and part of the process.

Volunteers, like paid staff, need guidance. Don't be afraid to inform a volunteer if their actions or tasks are not being performed correctly. There are many moving parts to a large event and everyone needs to be on the same path to success.

Although a formal performance evaluation is not required, some form of feedback is beneficial. Some volunteers may need a written evaluation for their school or organization.

Having a core group of 'lead volunteers' you have worked with before is valuable when designing and implementing recruiting efforts, and outlining roles and job descriptions. (This group is also a good place to start when you are ready to hire staff).

RECRUITING

Before you start recruiting you should identify what areas will need volunteers, how many hours and people are required, create job descriptions and list the skills and abilities needed for each position.

Matching the skills and interests of the volunteers available to you with the tasks that need to be accomplished can go a long way towards attracting the interest of potential volunteers, and keeping them motivated and involved.

Identify some of the key benefits of volunteering for your festival/event and promote these benefits in your efforts to attract volunteers. They might include such things as the opportunity to:

- Build capacity and knowledge
- Strengthen leadership skills
- Meet people and have fun
- Build networks and contacts

You also need to keep in mind the age range of volunteers and set restrictions. Often youth will volunteer out of good intentions but keep in mind any liabilities that may come with having underage youth working at your event.

Some options for recruiting volunteers are:

1. Events Nova Scotia has a Volunteer Tool available free of charge to major festivals and events. This is a database of 1000+ volunteers. Not only will this provide access to those interested in volunteering for festivals and events, it also includes a volunteer scheduling tool that will save you lots of time and effort. To learn more, follow the contact information on <http://eventsnovascotia.com/be-a-volunteer/>
2. Social Media is a great way to recruit volunteers. Posting on community Facebook pages, e-blasts, and your event's own social media pages to be shared by board members, staff and community members.
3. Local community promotions can work as well. Many festivals use community resources such as press releases along with flyers or posters at arenas or recreation centres. You can also approach:
 - Service clubs
 - Sports associations
 - Air, sea or army cadets
 - High schools, community colleges, or universities
 - Tourism associations
 - Church groups
 - Seniors' homes
 - Corporations or government (social or sports groups within these organizations)
 - Municipal employees

Volunteers are Staff

"Think of volunteers as staff. Have them complete an application form, conduct interviews and check out references before bringing them on board. Clearly define their position and responsibilities (with a short job description) before they start. One of the best ways to get new volunteers is to ask your existing volunteers to bring in some other people they know and think will be a good fit."

Joella Foulds, Executive Director
Celtic Colours International Festival
Cape Breton

4. Ask your existing volunteers, if you have some.

Have an application form for volunteers, along with some basic information that outlines expectations.

SCREENING VOLUNTEERS

Requirements for volunteer checks have been strengthened in the past few years, both through legislation and social policy. Nova Scotia has a Screening Fact Sheet, which provides an overview and basic information, at <http://novascotia.ca/lae/Volunteerism/documents/ScreeningFactSheet-ENGL-WEB-Sept18.pdf>.

If your staff and volunteers have or will have contact with children or other vulnerable people, you need to develop and implement appropriate screening policies and practices. Some festivals will screen volunteers through the police for a history that may compromise the integrity of the festival and put staff, other volunteers or visitors at risk. Check with your local law enforcement agency or through the Nova Scotia Department of Labour and Environment (<http://novascotia.ca/lae/volunteerism/>) to ascertain whether this step is feasible or advisable for your event.

Volunteer Canada has produced a comprehensive Screening Handbook which can be found at <http://volunteer.ca/content/2012-screening-handbook>.

ORIENTATION AND TRAINING

A Volunteer Handbook is an excellent way to convey your vision, objectives, and expectations and to serve as a resource for your volunteers. Each volunteer should also have a job description, and schedule of hours so that they have a clear idea of what is expected of them.

An orientation is a good idea. Your orientation session could start out with all the volunteers attending a general briefing and site tour, and then specific training with their section leaders, if appropriate. Remember to take this opportunity to relay to the volunteers how important they are to the success of the festival and how much their time and energy is appreciated.

Although the orientation and training session can seem like a ‘necessary evil’, taking up your time so close to the event, it is essential to train volunteers as completely as possible and avoid rushed explanations the day of the festival. Again, the scope and scale of the event, and the specific role of the volunteer, will dictate the level of training needed.

SAFETY AND LIABILITY

Make sure you are following all Occupational Health & Safety regulations to protect yourself and your volunteers. For example, some regulations state that while a stage is being erected, the site is considered a construction zone and everyone must wear safety boots and a hard hat. Check into the rules and regulations well before your first set-up day to avoid expensive, and possibly time-consuming, surprises.

Volunteers should also be well-trained in your risk management procedures and have clearly set out steps to follow in case of problems.

VOLUNTEER HOSPITALITY

Some festivals provide a separate area for volunteers to check-in, take breaks and have meals. It gives volunteers an opportunity to mingle, share information and rest in relative peace and quiet.

You will need to establish the procedure for volunteer meals – whether concessions will provide the refreshments or you operate a BBQ or some other foodservice specifically for volunteers and staff. Further discussion on this subject, as well as on identifiers such as t-shirts, was provided earlier in the Management and Staff section.

RECOGNITION

It's important to thank volunteers along the way. The staff and the board of directors should make a point of verbally thanking volunteers they meet or work a shift with. Also the volunteers could be thanked as a group each day over the PA system (if possible).

Most people simply want to feel that they are valued, and each person's sense of value comes in many guises. It could come in the form of verbal appreciation, free parking on-site, free meals, complimentary admission for friends and family, unlimited access to the festival outside of their volunteer hours, a festival pin or other memorabilia or a festival t-shirt. If your community festival has a small number of volunteers, then perhaps you can afford to personalize the gift or recognition and tailor it to the individual.

A volunteer recognition wrap-up party complete with thank you certificate or plaque is a great way to complete their experience. Singling out certain volunteers for their outstanding work can either motivate or deflate your volunteers. This is because everyone's efforts made your event a success. Take care how you word any specialized awards or gifts.

It's valuable to meet with key volunteers after the festival and get their input as to how things went, problems that need to be addressed in the future and to explore their potential role in next year's festival. This will help ensure they feel part of the team and will encourage their return. Explore their interest in becoming involved in different aspects of the festival/event so as to maximize the appeal to them and reduce the potential for burnout.

For the next year, an invitation by letter to join the festival sent early in the planning stages is a nice touch and sets the tone of appreciation and welcoming volunteers back.

There are numerous resources available on recruiting and working with volunteers. Check out <http://novascotia.ca/lae/volunteerism/> and www.volunteertoday.com for resources and links to other sources.

CHAPTER 8: OPERATIONS AND LOGISTICS

Site operations and logistics vary considerably from festival to festival. But, no matter the scale, there are always lots of details to be taken care of.

CHAPTER MODULES

- 8.1 Site Development (page 54)
- 8.2 Operations and Logistics (page 56)
- 8.3 Vendors (page 60)
- 8.4 Equipment (page 62)

Key Takeaways

- ❖ A site plan, even a hand-drawn one, will be invaluable.
- ❖ Operations and logistics cover everything the visitor sees, touches or does on-site. Be detail-oriented, have a schedule and critical path, and keep it up-to-date.
- ❖ Have clear contracts with all your suppliers, including food and retail vendors.

8.1 SITE DEVELOPMENT

PERMITS AND APPROVALS

Before any festival can happen, your team must work closely with municipal and provincial officials regarding permits, inspections and approvals. Chapter 4 outlined the various permits that you might require for your festival or event.

PLANNING AND DESIGN

A rough hand-drawn sketch of the site may be sufficient for your festival or you may require a computer-generated drawing that is 'to scale'. Whichever you choose, having something in writing avoids confusion.

Often your local town or city office will have computer generated maps of town common areas. Check with your local office to see what is available.

Programs such as PowerPoint are also useful when drawing your own site maps and are easily updated from year to year.

If you are going to be selling alcohol, you will be required to provide a diagram or sketch of the location to the Alcohol and Gaming Division with your application for a licence (See Chapter 4).

TRAFFIC FLOW

This is discussed in more detail in the Operations and Logistics section to follow, but, simply put, you must keep in mind where people will be congregating in relation to entertainment, stages, vendors, ticket booths, washrooms, etc. You will need to keep emergency access areas clear for vehicles, as well as a path through the audience for fire personnel or paramedics. EMT services require a 17-foot access path for all emergency vehicle access points.

Walking the site is a valuable exercise to see where there might be unusable areas and to check out the feasibility of your design plan.

ACCESS FOR ALL /SPECIAL NEEDS CUSTOMERS

At the time this guide was prepared (winter 2015) Nova Scotia does not yet have an act regarding accessibility but the process is underway to introduce this legislation. If it follows similar acts in place elsewhere in Canada, it is likely to introduce customer service standards and training requirements among other things. Check the status of this legislation and whether it has any implications for your festival or event at <http://novascotia.ca/coms/> (Department of Community Services). Some municipalities may have their own regulations, so check local rules as well.

There may be an association in your community that could provide expert advice and resources to make your site as accessible and welcoming as possible.

Whatever the legislation, easy access for wheelchairs and for visitors using canes or walkers should be a part of your plan, as well as providing accessible washrooms. Making your site accessible for wheelchairs and physically challenged visitors can be as simple as adding a couple of ramps and a separate, easily-accessible viewing area.

You should train your staff and volunteers on providing service to customers with disabilities. The Nova Scotia Tourism Human Resource Council offers a self-directed, 'Customers with Disabilities' online program, found through http://www.tourismhrc.com/index.php?option=com_content&view=article&id=9&Itemid=6

THEMING AND DECORATION

Decoration and theming will make your festival site 'come together', help beautify it and provide a complete sensory package to your visitors. Your site may be on a point of land that extends into the sea or a lake and the natural beauty will speak for itself, or you may hold a concert in a farmer's field that will need some extra effort. In some cases, theming the stage with backdrops, pots of flowers, and lighting is enough to set the tone.

SIGNAGE

Directional signage will assist with pedestrian flow and comfort and can also be used as an important theming tool. With a little more coordination on your part, your signage can have a consistent and professional look that tells visitors they are part of something special and adds to their overall experience and impression.

The challenge with signage is that vendors will already have their own signage that fits on their trailer or tent and will generally not want to spend additional funds to fit your image. It will be important to make the signage issue clear in your contractual agreement with them.

Plan your signage to reflect your theme or concept. It can become your de-facto décor with some creative thought.

8.2 OPERATIONS AND LOGISTICS

Operations and logistics involve everything that the visitor sees, touches or does on your site. People working in this area need to have the unique ability to plan out every detail beforehand and then react professionally and quickly when the plans are changed due to weather, performer cancellations or any number of factors.

ENTRANCE GATES AND TICKETING

If your event is gated, the entrance to your festival site must be appealing, welcoming, efficient and secure. The signage at the gates will serve to entice people to enter your site and inform them of prices, hours of operations, and programming. The entrance can be as simple as a table with a banner stapled to the front and a staff person or volunteer welcoming visitors and collecting entrance fees, to a complex arrangement of a box office with multiple service windows, electronic ticketing system, and credit and debit card capabilities.

Some things to keep in mind when planning your entrance gate:

- Where will line-ups form and will they affect vehicular traffic, block sidewalks, block driveways or entrances to businesses?
- Do you expect visitors to arrive before the gates open? Where do they wait and line up?
- Make your entrance obvious enough that visitors will not walk onto your site without paying.
- Allow adequate room for visitors exiting the site. If possible have an exit area separate from the entrance area to avoid congestion.
- Ensure the area is suited to wheelchairs.
- Make sure you have adequate lighting for night-time operation.

Helpful Tip:

Have a Detailed 'TO DO' List and Schedule

Prepare a detailed list of everything that has to be done, with a timetable, and assign responsibilities.

Identify 'milestone' dates, for operations and logistics and also for things like getting funding commitments, lining up sponsors, finalizing the program and starting marketing. Keep track of where you are at ... and the implications if you get behind!

TRAFFIC AND PARKING

For vehicle traffic management, speak to the police, your municipality's traffic management department, the municipal bus service if applicable and other stakeholders to decide the best places for directional signage, and to discuss potential traffic issues and solutions.

If your festival site is adjacent to a provincial highway, consult with the Department of Transportation and Infrastructure Renewal regarding traffic flow, turning, etc. You may also want to consider obtaining assistance from the RCMP in managing traffic, particularly if you are expecting large crowds.

If you are providing private parking, the approach to your site and parking operations are the first impression many visitors will have of your festival. If your festival has designated parking areas, they need to:

- Be well-marked and well-lit
- Have parking attendants that are easily identified
- Have parking attendants that are exceptionally well versed in what the parking plan is and how to deal effectively with situations that arise.

Communication in parking operations is key and radios are the best option.

Some events use a local group such as a hockey association or Scout group to assist with parking; they may raise money for their organization by asking for donations. This works well at smaller events, but it would be advisable to work with more experienced adult staff and volunteers for larger events.

Towing vehicles at a festival should be reserved for those blocking emergency vehicle access or bus lanes. It may be possible to simply tow the vehicle to a safer area rather than move them completely off the site.

COMMUNICATIONS

Depending on the size of your festival, two-way radios are a very effective way to communicate. They are available for rent in most areas.

Some festivals may use up to three channels or more, with security, parking operations, and general operations having separate channels. No matter the number of users, radios (walkie-talkies) will be most effective if all users are trained in proper radio-use etiquette.

A key communication point is how to handle emergencies (lost child, injured person), be sure your staff and volunteers are well versed in emergency protocols (see Chapter 10).

GUEST SERVICES

Your Guest Services could consist of your staff and volunteers (readily identified by badges and/or t-shirts), walking the site ready to answer any questions. Additionally you can set up a booth or tent and provide a variety of services, including stroller or wheelchair rentals and information on programming.

FESTIVAL PROGRAM

People attending the festival will want a copy of the program of events. This is a listing of what is happening where and can include a map of the site. Glossy, full colour, and 20+ pages long may be tempting, but a photocopied sheet may suffice.

Post your program and schedule on your website and/or Facebook page, and make sure they are mobile friendly. This will also help lower the amount you spend on printing.

TOURIST INFORMATION

Your local tourism association or tourist bureau may supply you with pamphlets or other material on local attractions, restaurants and accommodations. They may also request a booth on-site to distribute information and answer questions.

Put a local map on your website (and in delegate's bags if you have them) as well as links to local tourist information.

LOST CHILDREN/FIRST AID/LOST AND FOUND

Lost Children and First Aid services should be situated in a common, easily identifiable location. You may require more than one area depending on the size of your event.

When a child is brought to the Lost Children area, you should wait an appropriate amount of time and then announce the child's name and/or description over your public address system. In most cases the parent will come looking for the child as soon as they are noted as missing. It's critical to make sure that proper identification is required and obtained to pick up a lost child. It is a good rule that the child can only be released once a staff/security person is on hand to confirm the parent or guardian is properly identified.

For First Aid services, there are organizations that will staff your event for free or for a nominal charge. Meet with emergency service professionals (Fire Department or Police or Paramedics), to get an idea of the requirements or their recommendations for first aid care at your event. You may be advised to have an ambulance and paramedics on-site during some of or your entire event.

Lost and Found could be included in this same area, or be located at the front gates or festival office. There are times when valuables are recovered, like wallets or digital cameras, and you will want a secure place to store them.

VIPS/ SPECIAL GUESTS/MEDIA

You may create a separate entrance and welcoming staff for your VIPs, as well as provide a priority parking area. Be clear on their invitation where they should go and provide a map of the site. Whether VIPs and media have a separate entrance or not, it would be a good idea to have a VIP package or media kit available when they identify themselves at the gate.

GROUP HOSTING

Groups require some special considerations such as a coordinator responsible for:

- Communications with the group (tours, schools or other groups).
- Welcoming them on site.
- Selecting a meeting area for the group when they are getting together for a meal or leaving.
- Facilitating expedited entry. For example, giving out bracelets or tickets on the bus and bringing the group through the gate as a whole.
- Having a festival program or information distributed before the group arrives on-site.
- Parking for the bus or other vehicles associated with the group, and
- Drop-off and pick-up area.

Seniors' groups especially will need adequate seating (preferably out of the sun or rain), and possibly some complimentary refreshments like water and coffee.

GROUP FUNCTIONS AND CATERING

Catering may be able to be arranged with concessions on site, or you may want to bring in a professional caterer for VIP events. Corporate groups may want to host a reception on your site, maybe even a dinner before the gates officially open if you are offering only evening programming. Caterers tend to be self-sufficient, but check with them ahead of time to make sure they don't need electrical hook-up or cold storage.

STAFF/VOLUNTEER/ENTERTAINERS CATERING

There should be a separate area for staff and volunteers to rest and have meals. Some festivals work out a deal with concessionaires, and staff and volunteers and entertainers can get their meals from the food booths. At other festivals, there is a separate BBQ or cooking area where this food is prepared.

Remember that if there is a separate area for food preparation, you will need a permit from the Department of Agriculture (Food Establishment Permit), Office of the Fire Marshal and, quite probably the local municipality.

SITE/WASTE MANAGEMENT

Recycling is a key concern for events. The types of service offered and types of items accepted vary considerably from region to region. Although recycling is compulsory in most cases, you will need to research what is specifically available in your area and what the rules are. For example, what happens when the recycling material gets contaminated with other garbage? How must recyclables be bundled for pick-up? What are the municipality's policies for hazardous waste like empty propane tanks, paint cans, etc.?

Site cleaning should happen on a continual basis throughout the day, with a thorough cleaning overnight. Emptying garbage cans before they overflow is especially important and keeps your grounds looking professional and welcoming. Washroom cleaning and re-supply are also crucial to a successful visitor experience.

When contracting with food vendors it's a good idea to include in the agreement that the vendor is required to keep their site clean and free of debris.

A communal, easy-to-access area for three-stream garbage should be provided for vendors, staff and volunteers to take refuse throughout the day as required.

An environmental policy will help ensure that your event does not have a significant negative impact on the environment and flag all the issues you need to address.

The province provides resources and links regarding recycling and waste generally at <http://www.novascotia.ca/nse/waste/>. Green Manitoba has a web page dedicated to Green Tips for Festivals and Events <http://greenmanitoba.ca/green-tips-festivals-and-events/>.

8.3 VENDORS

FOOD AND RETAIL VENDORS

Vendors who are used to festivals and events are generally fairly self-sufficient. They usually need electricity and sometimes water depending on what service they are providing.

Vendors will more than likely need vehicle access direct to their booth or tent each day to re-supply. Contracts with vendors should clearly outline access times and when vehicles are allowed/not allowed on-site. You will also want to consider:

- Hours of vendor operation
- Expectations of operating hours in case of bad weather (i.e. is it up to the concessionaire to make the call to open or to close, or is it up to the festival management?)

- Accreditation and access (i.e. Will you give the vendor a set number of passes to distribute and share amongst their staff, or will you give them an unlimited number?)
- Set-up and tear-down schedule
- Fee and/or percentage agreement
- Type of product allowed; i.e. you may have a sponsorship agreement with a soft drink supplier, or, you may restrict the number of vendors selling a certain type of product, like ice cream or popcorn.
- Prices they will be charging; i.e. to avoid vendors undercutting one another.

Keep in mind pedestrian traffic flow to and from the concession area. Make sure that sight lines to the stage or pathways/sidewalks are not compromised by long lines to the vendor booths.

Be clear and careful with contracts for vendors (and other suppliers) and make sure you know what you are signing and what your responsibilities will be. For more complex contracts, it may be good to get some legal advice.

FOOD & BEVERAGE

In smaller community events, the food service is often provided by a local volunteer group who do all the purchasing, preparing, and selling. Proceeds will either go back to the festival or be split with the volunteer group. For events expecting large crowds, experienced food service operators are the best option for happy and satisfied visitors. These experienced vendors have the expertise and techniques for ordering supplies and preparing large quantities of food efficiently.

The type of food you sell depends on the vision and objectives of your festival and on your crowd expectations. There are many options for food vendors and we suggest you contact local farmer's market vendors and street food trucks as possible vendors for your event. In speaking with other festivals/events, you will be able to determine what works best and which vendors are the most professional to deal with.

RETAIL

Visitors to festivals are often looking for souvenirs or a unique 'find' and a few retail vendors can add a lot to the general festive air of your event. Retailers at festivals tend to be local merchants or artisans and you can make a decision whether to only include one-of-a-kind and craft-type items, or to allow mass-produced products.

In your contract with the retailers, it would be wise to outline items, logos or themes that you will not accept on site. Examples include pornography, hate literature or slogans, drug paraphilia and or political messages.

Festival souvenirs are a great idea. Take into consideration the kind of crowd you are expecting and order accordingly. The financial aspects of souvenir sales were discussed in Chapter 5.

REGULATIONS AND PERMITS

Vendors are generally responsible for arranging for their own permits and approvals. Although concessionaires are ultimately responsible, it would be advisable to contact the various departments/agencies yourself (See Chapter 4 for details) and double-check to make sure that everything will be a ‘go’ on opening day.

Retail operations (including the festival’s souvenir sales) will most likely require a sales or vendor permit. Depending on your municipality, this could be a single event permit that covers all retailers on-site, or the regulations may state that each retailer must apply for their own permit.

8.4 EQUIPMENT

Developing a comprehensive list of required equipment is essential if you want to save money and manpower, and run an efficient event. Each area needs to determine their requirements; then create as complete a list as possible and integrate the information into a master list.

This master list will help in researching suppliers and in negotiating rental contracts or in-kind sponsorship arrangements. It will also aid in establishing delivery and pick-up times before and after the festival.

Storage and warehousing issues also need to be addressed. Are there storage facilities on your site, or will you be able to place equipment as it comes in? Most likely, you will need some sort of storage, even if it is in a tent or under a tarp.

TYPES OF RESOURCES

BLEACHERS

Will you need to add bleachers to accommodate your audience? They may be able to be rented or borrowed from the municipality. Otherwise, they can be quite expensive to rent and transport.

TENTS AND TENT FLOORS

Tents could be needed for concessions, info booth, first aid area, storage, logistics headquarters, programming, and retail. Most tent rentals come with sides that can be closed during rain or wind and at the end of each day. If your site could potentially become a swamp after rain or if the terrain is particularly uneven, you may want to consider putting flooring in the tents.

Helpful Tip: Tents

Include the paragraph at the top of the next page (starting “All tents used ...”) in all your vendor contracts. The Fire Marshal will not approve a vendor to open if the tent does not meet regulations and fines may be placed upon the event if the rules are not followed.

All tents used on site must comply with Canadian Fire Standards (**CAN/ULC-S109-M / NFPA701**). *(Please note that U.S. fire treated tents do not meet these standards).* Your tent must have the original manufacturer fire

retardant tag attached to the tent. Your tent must be equipped with a 5lb A.B.C. Fire Extinguisher, or the appropriate fire extinguisher (depending on the type of product you are selling).

TOILETS

A toilet rental company can give you good advice on how many portable toilets are needed for the expected size of your crowd. Make sure the maintenance schedule is adequate for your event. Scrambling to buy extra rolls of toilet paper and stocking the facilities is an unwelcome surprise duty!

Wheelchair accessible portables are available and required by law.

BARRICADES AND FENCING

You may be able to borrow barricades from your municipality, or, in some cases, from a local construction company. Metal barricades are generally used to surround your event site and for crowd control; the wooden-style barricades are most often used for parking operations or other cases where they need to be moved easily. Fencing can be rented for larger festivals and used for crowd control, and may be required by the Alcohol and Gaming Division in order to get a permit to sell alcohol outdoors. They will restrict the licenced area to a tent or to a suitably enclosed area with minimum 4 ft. fencing.

TABLES AND CHAIRS

If you think you have ordered enough tables and chairs, add another 25! Tables and chairs get swallowed up into the festival black hole and tend to get underestimated during the planning stage.

RISERS AND STAGING

Risers are sturdy boxes (generally 12” high), that can be put together to form a small stage or used to create a raised seating area. Staging is more expensive and complex to construct, but may be needed depending on the size of your crowd and production requirements.

ELECTRICITY AND LIGHTING

There could be enough power on site to supply your festival, or you may need to add to what’s available by renting or borrowing generators. Generators can be noisy, and extra work will be needed to insulate them and dull the sound. Also, diesel generators must be maintained and the diesel replenished regularly.

Working with a professional sound and lighting company for music events or large multi-day events is highly recommended. These companies provide trained technicians who know the proper usage of electrical equipment and electricians who may be required for permit approvals. They also provide peace-of-mind.

TOOLS

Your logistics person could supply tools, for an extra fee as part of their contract, or the festival may choose to invest in buying tools that can be used each year. Small tools (hammers, pliers, staple guns, duct tape, cutters) are hard to keep track of. Whatever you buy or bring, know that you will need to re-supply at some point.

VEHICLES

You can use personal vehicles or rent vehicles. For personal use, most events pay mileage or a flat fee. Sometimes rental vehicles can be provided through an in-kind sponsorship. Your festival may need everything from a three-quarter ton pick-up truck to cargo vans to small buses. Remember to have petty cash or a credit card system arranged for gas or other incidentals.

If renting vehicles, keep in mind that drivers between 21 and 25 are subject to additional fees and that there may be restrictions on the types of rental vehicles they can drive.

REFLECTIVE VESTS

Reflective vests can be purchased by the festival, or possibly borrowed from the municipality or a local construction company. They are essential for parking attendants.

OFFICE SUPPLIES AND EQUIPMENT

This is discussed in the budget section. In your first year it's a good idea to see if a sponsor will be willing to support the festival with in-kind use of office space and supplies. Often, start-up festivals can be organized from home offices, limiting your office supply needs to basic printers, laptops, Wi-Fi and cell phones.

TRAILERS

Some sites will have enough indoor space for all your needs. Otherwise, you may need to have trailers to accommodate staff and volunteers. Some areas that could benefit from the use of a trailer include:

- Administration
- Logistics
- Volunteers
- Artist hospitality
- Production
- Ticketing
- Accounting
- Security
- General Manager

Money-handling would be done in a separate area or secure trailer; other areas could share space.

Tents could be used in the place of trailers in some cases, but you would need to take into account security requirements, electronics, access to electricity, and communication lines.

RENT OR BUY?

When discussing the merits of renting or buying equipment, keep in mind maintenance, storage, insurance, and replacement costs. Some items would be best to buy outright (small tools, reflective vests), but others are more cost effective to rent (tents, fencing).

One discussion that arises among festivals is buying equipment and then renting it out to other events. This is a great idea in theory, but it may not be when you take a realistic look at maintenance, storage, insurance (including liability insurance) and replacement costs. As well, there will have to be a staff person to coordinate the rentals, invoicing, payment, delivery and pick-up.

IN-KIND SPONSORSHIPS

In-kind supplier sponsorships are invaluable to any festival, as long as what they are supplying is an item that you would normally spend money on (renting or buying). Once there is a master equipment list, it will be simpler for the sponsorship coordinator to negotiate contracts with sponsors. They may even be able to work out deals if no sponsorship is available.

Helpful Tip: In-Kind Sponsorship

Don't restrict in-kind sponsorships just to equipment. You could get someone to donate food and beverage for your entertainers, flights, car rentals, hotel rooms, technical services or even a video of your event.

SET-UP AND TEAR-DOWN

You will require anywhere from a week to a day before and after your festival for set-up and tear-down. Keep this in mind when booking your site dates. Set-up and tear-down always takes more time than you expect.

CHAPTER 9: PROGRAMMING AND PRODUCTION

Programming is the most important aspect of your event – it's what's going to sell the tickets. Invest the time, people and money in getting it right.

CHAPTER MODULES

9.1 Programming (page 66)

9.2 Management and Production (page 68)

Key Takeaways

- ❖ An experienced artistic/program director who understands the vision for the festival or event is essential.
- ❖ A significant music or stage production event will probably need professional help and likely a stage manager as well.
- ❖ If you are booking artists, take care to read the contracts and technical riders carefully.
- ❖ Hospitality for your artists is important to their comfort and happiness.

9.1 PROGRAMMING

You will want to re-visit your vision, goals, and objectives when planning your programming. There are often arguments to be made for and against certain types of programming and you and your board of directors will have to determine how strictly you follow your objectives.

ARTISTIC/PROGRAM DIRECTOR

Having an experienced Artistic/Program Director who understands the board of director's vision and programming sub-committee's goals is essential to a successful event. An

Helpful Tip: Artistic/Program Director

This is a very important aspect of any event—it is what is going to sell the tickets ultimately—so you need to have the right person in place with a supportive team. It's also one of the more coveted roles at any festival. You can often find many people who are keen to volunteer their time to grab a piece of the creative element. The challenge is finding the right people.

experienced Artistic/Program Director will know about proper etiquette in regards to formal offers to artists, contracting and technical requirements and will have other important insights into the industry.

DAILY PROGRAMMING

Daily programming is your scheduled events that are listed on a Festival Program, website, social media pages, in the newspaper, or at the entrance gate.

Research other events in the region with a similar program (music, film, etc.) to see if there is a performer who fits within your event's vision. There may be an opportunity to recruit them to your festival if they are already in the area.

Helpful Tip: Proximity Clauses

Be careful of 'proximity clauses' in contracts. These are becoming bigger issues particularly in the US, and are becoming more mainstream. Proximity clauses are put in contracts by an event and state that the performer can't play anywhere else in a defined geographic area for a specified amount of time. So, the entertainer you want may be restricted from playing again in the region for the time you want them.

SPECIAL EVENTS

Special events serve to add value for your existing market, or to draw visitors to your festival who would not normally consider attending. These could include workshops and interactive sessions on such things as creative writing, singing folk music, making musical instruments, oil painting, making model tall ships, food and wine pairing or any variety of topics related to your festival. Special events could also include the screening of a documentary, hosting a celebrated speaker or a 'behind-the-scenes' tour.

MULTI-VENUE OR OFF-SITE EVENTS

Events vary from having a main festival site, to one that uses multiple venues and a mixture of the two. How you choose to place your festival events will be determined by the scope and theme of your event as well as your area's available facilities.

Make sure you understand staffing, volunteer and general logistic requirements that come with multi-venue events.

SCHOOL PROGRAMS

Your programming may fit well into the curriculum of your local schools. Some festivals have assisted in creating teacher's aids, and then have a school initiative where busloads of students are brought on-site for special programming.

If your board of directors is keen to involve schools, keep in mind that teachers have set curriculums and you may need to plan a full year ahead to be included in class studies.

This could be done as a way for the festival to contribute to the community, or it could be a source of revenue from the students' attendance. Keep in mind there are also government special event-funding streams that encourage youth engagement. Have your team research possible government funding for your special events.

9.2 SHOW MANAGEMENT AND PRODUCTION

If your event is focused around music and large stage productions you will need to hire a professional sound and lighting company. They will often be able to provide staging as well as all the technical knowledge required to run a professional music festival.

You will need a stage manager (along with volunteers) who will do everything from ushering performers on and off the performance area to moving chairs and microphones and communicating with the sound technicians. The stage manager is an integral part of the team. If you are doing a big show and have a volunteer stage manager, you will likely need an experienced team to coordinate technical production, artists/performers, etc.

The more well-known artists you book, generally the more complex the arrangements.

CONTRACTING AND RIDERS

Your contracts with performers can be as simple as a letter of agreement that states what the performance times are, the type of performance, how much they are getting paid and when they are getting paid.

If your event is contracting with performers who are more well-known, contracts and agreements become more detailed and it is here that having a qualified Artistic Director comes in handy. Bands come with various types of 'riders'.

There are technical riders (specific requirements on the type of equipment or musical instruments, the exact stage set-up for chairs and equipment, sound requirements etc.), and hospitality riders (requirements for food and drink, accommodation and transportation). Bands will often put small things like certain types of food or drink in their riders to ensure that you are reading the contract clearly and will have all on-stage technical requirements taken care of properly.

All artists, whether amateur or celebrity, can run the gamut from being completely flexible and accommodating, to being demanding and difficult. A calm and respectful attitude in your stage staff goes a long way to successfully handling almost any situation.

Having a production manager, and/or staff and volunteers who have direct festival experience would be a great benefit to your event. Outdoor venues are much more complex than events held indoors. They can bring unexpected situations such as 70km/hour winds and a thunderstorm resulting in ruined soundboards.

Even a small, one-day event would probably best be served by staff who has dealt with adverse weather and other on-site crises.

ADVANCING

Advancing with artists and technical teams is essential to a successful event. This is when you have an opportunity to discuss any specific requirements with performers. Contracts can be double-checked to make sure both parties are on the same page. Many issues can be avoided when advancing is done appropriately. This is your chance to discuss any limitations of your event with the key stakeholders – performers, technical staff, etc.

STAGING

There are many different types of stages. These range from 12” risers placed together to form a surface area, to a space on the grass, to a 5 ft. high stage that unfolds from the back of a tractor trailer to a stage that is built piece by piece over a period of days.

Too small a stage for your crowd and your audience will be complaining about not being able to see everything. Too large a stage and your acts will look lost and your audience will be complaining that everything is too far away. Research, talk to other festivals and rely on the professional knowledge of your sound and technical team to know what is appropriate.

BACKSTAGE SECURITY

Again, depending on your performers and the nature of your event, backstage security will either be a non-issue with artists and visitors mingling about, or it will be a tightly-controlled secure area with only those having a certain level of accreditation permitted.

Celebrities have a reasonable expectation of privacy and may have legitimate worries for their safety.

You will know from your consultations with police whether you have any unusual safety and security issues and need to take appropriate precautions.

REHEARSALS AND NOISE LEVEL

When meeting with local residents and other stakeholders keep in mind that, aside from your scheduled programming times, some shows may need sound checks and rehearsals. These can be as loud as the event itself. Make sure that by-laws allow for the appropriate level of noise during sound checks (they normally occur in the late morning or afternoon), and that you inform police and other stakeholders (City Hall switchboard or municipal councillors) in case of complaints.

If you need to, apply for a noise by-law exemption; this allows a certain decibel of music past the normal hours for noise. Then it is in your best interest with respect to public relations with the community to conform to that time limit to the minute. Residents will be more tolerant of excessive noise as long as they know about it ahead of time and it ends when it's supposed to.

ARTIST HOSPITALITY

Your performers will appreciate some form of hospitality, from meals to accommodation. The sponsorship coordinator may be able to negotiate hotel or motel rooms or they may need to be factored into your expenses. For meals, you could have the concessionaires provide these under their contractual agreements.

Some festivals have staff and volunteers specifically assigned to artist hospitality. Their duties might include:

- Transportation from the airport, to and from hotels for sound checks and show, and return to the airport
- Provide refreshments and snacks in the artist trailer, tent or 'green room'
- Fetch the performer for sound checks and show time
- Arrange meals
- Deliver welcome packages to hotel rooms (for artists, delegates, VIPs)

Helpful Tip: Hospitality

Meals are important and becoming more and more complex due to dietary restrictions, preferences and other needs. It can be a big deal – if your artists are not well fed, they are not happy. Make sure they feel well looked after!

Essentially, whether you are supplying bottles of water and pizza or gourmet catering, performers just want to feel as comfortable as possible while providing your visitors with what they came for ... great entertainment!

PRODUCTION SCHEDULE

For more involved shows, a production schedule is essential for anyone involved in the technical production. This usually details all production-related activities from early morning to late night. It becomes your 'bible', so to speak, of who should be where and when and what should be happening.

Production schedules are also very important for paid staff as many technical crews are part of a union that does not allow excessive hours without meal breaks. For some larger shows, even a half hour delay can throw a schedule off and end up blowing a budget because of overtime.

CHAPTER 10: IF SOMETHING CAN GO WRONG....

Problems will arise and you need to be ready to deal with them. Have a plan for different contingencies and arrangements with outside agencies for assistance when required.

CHAPTER MODULES

- 10.1 Contingency Planning (page 71)
- 10.2 Risk Management (page 73)
- 10.3 Insurance (page 75)
- 10.4 Security, Emergencies and First Aid (page 76)

Key Takeaways

- ❖ Contingency planning is the first step in being ready when things go wrong. It should address all of the potential problems that might arise.
- ❖ Have a risk management plan in place.
- ❖ Make sure you (and your suppliers) have insurance – and the right insurance for your needs.

10.1 CONTINGENCY PLANNING

Murphy's Law states "If it can go wrong, it will go wrong". While that may not always be true, it often is. The best Murphy insurance is contingency planning – having a solution at hand for each reasonably likely problem that might arise. Contingency planning is vital for a festival or event.

The kinds of problems commonly encountered at festivals, and what you can or need to arrange to be able to deal with them include:

Bad weather

- Tents for programmed events
- Alternate venues for outdoor programs

- Rain day passes for attendees to return for a rescheduled performance (multi-day events)
- Refunds

Power failure

- Backup power source installed
- Emergency generator(s) on site or on call

Equipment failure

- Standby equipment
- Spares
- Rentals on site or on call

Robbery, Vandalism

- Police in close contact

Entertainer cancellations/no-shows

- Backup entertainment/program
- Rain day passes (multi-day events)
- Refunds

Staff absences, volunteer no-shows

- Call-in backup staff
- Multi-task training

Some problems could be of an emergency nature and require more extensive arrangements. These include:

Fire

- Fire extinguishers
- Emergency communications
- Fire engine access
- Evacuation plan

Illness, injury

- Paramedics/First aid on hand
- Emergency communications
- Ambulance access

Unruly behaviour, drunkenness

- Security personnel
- Emergency communications with police
- Holding area

Traffic problems

- Security personnel
- Parking personnel
- Police

Unauthorized entry

- Gate/access control
- Fencing, perimeter control
- Security personnel

It does happen....

"Be prepared for anything to happen. We had a hurricane during one of our events. It was a mad scramble by all the volunteers to get everything down – the signs, tents, portable washrooms, before the hurricane hit so nothing would blow around the field and cause damage."

Bob Dulhanty

2013 Canadian Junior Baseball Championships

10.2 RISK MANAGEMENT

Risk management is a strategic process that will improve your ability to identify, analyse, control and, if required, deal with (i.e. through insurance coverage) risks that are associated with your festival. It is a commitment to high standards of care with respect to the health, safety and security of your guests/visitors, employees and volunteers. Having a well thought-out risk management process and procedures may also assist you in obtaining insurance; in fact, it may well be a requirement for your insurance coverage.

You need to be pro-active in risk management and keep well documented records of the risk management process you follow. It's a good idea to have a series of checklists dealing with every aspect of your risk management process, including risks you have identified, their evaluation and prioritization, how you plan to deal with them and your response/contingency plans.

Risk can be created by one or more of the following:

- Poor planning
- Unsafe physical conditions
- Natural events such as storms, floods,
- Inadequate safety measures
- Inadequate management
- Human behaviour
- Relationships with suppliers and contracts that are not clearly defined and agreed to

The risk management process involves several steps:

STEP 1: IDENTIFY THE RISK

The first task is to identify all the risks that might potentially exist for your festival/event – what might happen and what the implications might be if it does.

Many municipalities have a 'Special Events Task Force' made up of various departments that are integral to major events. These include police, EMT, power/hydro, traffic, waste removal and fire. Meeting with this task force will not only help you identify partners required to organize your event, but their experience will help you identify any common risks you should be aware of.

Some Aspects of Festivals & Events that might create Risks

- Arrivals and parking – cars, trucks, pedestrians
- Crowd disturbances and controls
- Stages
- Sale of alcohol on-site
- Food preparation on-site
- Line-ups

You can also:

- Review historical material on the festival/event
- Review written material such as contracts, relationships with suppliers and sponsors, program details, etc.
- Meet/brainstorm with staff, suppliers, contractors, security/emergency personnel, etc.
- Survey your festival/event site, several times during both day and night if it's an outdoor event – in the early planning stages, before the event and during the event. This requires a careful walk through and consideration of all potential risks. Examples of things to watch out for include:
 - Unprotected tent stakes and ropes
 - Objects protruding into walkways
 - Unsecured electrical cables or boxes
 - Deteriorated seating areas or loose handrails
 - Poorly lighted areas
 - Poorly marked entrance/exit areas

STEP 2: EVALUATE AND PRIORITIZE THE RISKS

For each of the risks identified, assess the likelihood of them occurring as well as the potential impacts and the severity of these impacts. Those that are more likely to occur and have the most significant consequences should be given the greatest attention in your planning. Your prioritization should consider the potential impacts on your visitors, staff, volunteers and performers, as well as the potential impact on the festival/event and the resources of the event.

STEP 3: DEVELOP AND IMPLEMENT A PLAN TO CONTROL EACH RISK

Design your plan to achieve one of the following, with a) being the preferred choice:

- a) Eliminate the risk or the potential of it occurring
- b) Reduce the consequences
- c) Develop response and contingency plans to deal with the risk if something does go wrong
- d) Transfer the risk to some other group – a supplier, emergency services, etc.

STEP 4: REVIEW, MONITOR AND MODIFY

Finally, risk management is an ongoing process, so regularly review, monitor, update and modify as required.

RESPONSE AND CONTINGENCY PLANS

It's unlikely that you will be able to eliminate all the risks that might potentially occur so you will need to have response and contingency plans in place to follow when things do go wrong. Dealing with security and emergencies is explored later in this chapter.

10.3 INSURANCE

All festival operators must carry insurance, regardless of the size of the festival and you may well be required to carry insurance in order to obtain some permits and licenses. If you are a small festival, you may be covered under the insurance coverage of your parent/community organization or, potentially, the municipality. Or, you may be able to arrange for coverage through the municipality's policy if you are using their facilities.

You need to make sure that you co-insure your sponsors, the community and other key partners and ask them to co-insure you in return. If a sponsor happens to be responsible for an accident or incident, you, as the event operator, will also be held responsible.

The main types of insurance you need are:

- General Liability Insurance is insurance to cover claims made against your festival for bodily injury or property damage arising from your operations. This insurance is commonly known as third-person liability insurance.
- Director's and Officer's Liability is important to a not-for-profit organization with a board of directors. This type of insurance covers directors for wrongful acts such as wrongful dismissal, errors and omissions in the course of performing their duties while acting as a director/office of the association. While Nova Scotia's Volunteer Protection Act does provide volunteers with some protection, you may find that your board members are much more comfortable if you carry this type of insurance.

Depending on the scope/scale of your festival, you may also want to consider:

- Equipment Coverage - insurance to protect the equipment of your festival, including maintenance equipment, restaurant equipment if you operate a restaurant or canteen within the attraction, etc.
- Rain cancellation insurance, which is expensive but perhaps worth considering given the nature of your event.
- Crime Insurance which protects you from losses resulting relating to the taking of money, securities and other property. It is sometimes divided between losses that take place 'inside' the premises (such as employee dishonesty) and losses that occur 'outside' the business premises such as theft and robbery.

Helpful Tip: Insurance

Make sure your insurance company is familiar with your contractors' insurance. Usually they will want to see their policies to make sure you are covered as necessary.

The specific types of insurance you should hold will vary according to a variety of factors, including the size and nature of your festival. Seek advice from an insurance broker as to the specific requirements and needs

for your festival. Remember that if you have beer tents or any other areas with alcohol being served, your insurance costs will increase significantly.

A guide, 'Insurance and Your Non-Profit Organization' can be found at <http://www.novascotia.ca/finance/site-finance/media/finance/InsuranceGuideNon-Profit.pdf>.

10.4 SECURITY, EMERGENCIES AND FIRST AID

The discussion to follow expands on health, safety and security issues.

EMERGENCY SERVICES – SAFETY AND SECURITY

As suggested above, connect with your municipality's Special Events Task Force if possible to cover any issues that may arise. If your municipality does not have such a task force, connect with the parks and recreation office to suggest one be established.

Representatives could include:

- Local police detachment
- Fire department
- Paramedics
- By-law enforcement
- Nova Scotia Alcohol and Gaming Division if you are serving alcohol
- You own security people and/or other officials responsible for the site you will be using

The most important objective here is that everyone has the same basic information in the event of an emergency. Issues to be addressed include site locations of concern, hours of operation, expected crowd sizes, expected problems or concerns, etc. An important part step is the developing a site map (see Site Development, Chapter 8) and plan for emergency response and access, which is discussed below.

Once you have shared the general information about your festival and created a plan for dealing with emergencies, your Task Force may decide that they don't need to meet again. That will depend on the complexity of your event and level of perceived risk.

EMERGENCY PLAN

Having a plan to deal with emergencies is critical – accident, evacuation, fire, medical emergency, site grid, access/egress are all factors needing consideration.

An evacuation and emergency plan can actually be as simple as everyone involved in emergency services in your community knowing how to access the festival site on foot or by vehicle in case of emergency. It can

also be quite a detailed undertaking; it really depends on the location of your event and the kind of crowd you expect.

Be sure your festival site map clearly indicates emergency exits, first aid stations or any other pertinent information that may be required in an emergency.

CONTACT INFORMATION

A contact list with cell phone numbers or emergency numbers should be distributed to staff, volunteers and your security team. A larger list with all contacts will be useful, but a smaller list with key contacts could be taped to radios or cell phones as well. The key contact list should include emergency service numbers as well as those of key staff and volunteers.

CRISIS COMMUNICATIONS

Communications are critical to the successful implementation of emergency plans. Festival staff and volunteers need to know who the specific individual is that makes the decision to implement an emergency plan, how that decision will be communicated to them (staff and volunteers) and to your visitors, if necessary. Plans need to be in place for communicating with emergency services personnel and for communicating within the festival staff and volunteers.

Make sure staff and volunteers are clear on whom they are to call in case of an emergency or crisis. A phone tree can be an effective tool.

Train staff and volunteers on the use of radios and/or cell phones. Most of us in our day-to-day life have no call to use a radio. They are toy-like and invite all kinds of banter and horsing around, which needs to be discouraged. Establish operating procedures (how to use a radio, dos and don'ts on air), and encourage everyone to follow them. Remember, you never know who the people with radios are standing next to!

An important procedure is a Code Red to be called when there is an emergency. Once a Code Red has been called, then all radio traffic conversation is to be ceased except for those communicating the situation. The 'all quiet' remains in effect until an official staff person calls 'Code Green' meaning the situation has been dealt with and normal procedures can continue.

Another option is for a second channel to be designated for communication between two people that does not affect the festival as a whole. Staff or volunteers can ask to 'go to channel 2' to discuss issues that do not need to be heard by everyone.

CROWD MANAGEMENT

It helps if you have past data that allows you to predict the kind of audience you are going to attract, the approximate number of people that are expected to attend as well as the periods of peak activity. This will

allow you to plan for pedestrian traffic flows (entry and exit, walkway and queuing area capacities) as well as the capacities required for programmed events at different venues (seating/standing areas, number of security and service personnel).

For open, un-gated events with limited capacity due to fire regulations, having a security person at the door with a manual person counter is highly recommended.

Are you serving alcohol? Do you have any late night activities? If yes to either, then more security personnel are required, particularly for evening performances.

What ages are you expecting? Youth are generally more of a challenge.

Are you expecting any 'problem' crowds? Problem crowds don't necessarily mean those drinking heavily and looking for a fight. Your problem crowd could be any group of which there are too many people competing for access and seating. 500 senior citizens trying to cram into a space for 200 will most definitely be a problem.

With your site plan at hand, walk your festival site and see how the crowd flow will work. Keep an eye out for:

- Conflicts between your entrance gate and access to toilets
- Whether visitors exiting have to cross in front of the stage when the audience area fills up
- Whether there are enough exits for when the event is over
- What will happen if people start lining up before your gates are open
- If there is a line-up at the food concessions, whether they will block sight lines for the stage.

Good directional signage is important. It should clearly guide people to the locations of toilets, food concessions, beverage concessions, shops, first aid, visitor services, etc.

FIRST AID AND PARAMEDICS

You will definitely need to provide emergency medical services. They might include having designated staff/volunteers with advanced first aid training on site and accessible at all times, and/or arranging for St. John's Ambulance to provide on-site service.

First aid organizations normally cannot transport patients to a hospital. That is done by emergency medical services, such as paramedics, specified ambulance companies, police or firemen. Working out a communications and response plan with your local emergency services organizations is essential.

There may be some occasions where you would want to ensure paramedics with an ambulance are stationed on-site. There may be a charge for that service.

SECURITY STAFF

Some events require a minimal security staff such as a force of all volunteers with a staff person as Security Coordinator. Other events will require a Security Coordinator along with paid security personnel to handle the more demanding aspects and volunteers to assist them and deal with the more routine duties.

A calm, positive attitude and professional conduct of security personnel are key to the successful outcome of most situations. Security staff can directly influence the escalation or de-escalation of emotions. Poor handling can turn a minor problem, such as a visitor insisting that they ‘forgot’ their pass and demanding access, into a major concern. And the reverse is true; a rowdy group can be calmed with a positive but firm approach – all the time remaining calm and exercising restraint. Security personnel need to accept that all visitors are customers and should be treated accordingly, and in a courteous and respectful manner.

In choosing your security staff, keep these attributes in mind. Training security staff should include these elements - along with a clear definition of roles and communications procedures during normal day-to-day operations of the festival, as well as communications during a crisis situation.

ACCREDITATION – WHO GOES WHERE

Accreditation involves authorizing different categories of people to access different parts of the site. There needs to be an easy-to-understand system of controlling who goes where on a festival site. Accredited people, properly identified by uniform can also provide visitors with access to the right people to give them information or directions.

Although accreditation could be perceived as being required only at fancy, big-city events, this isn’t so. Every event needs something in this regard. Its complexity or simplicity can vary depending on the level of need for security and control.

In assessing the need for an accreditation system, ask yourself:

- Do we care if everyone has access to everywhere?
- Are there sensitive documents or valuables or money that will be handled and/or kept on site?
- Will the artists expect a ‘closed’ backstage and waiting area?
- Are festival personnel-only spaces important; if so, where and when?

Ease of recognition for the different categories of accredited staff, media and volunteers is a key factor, particularly for those intended to be accessible to visitors. The colour of the badges is also a key consideration, especially if your event runs into the night-time. Even in daylight, a system that includes distinctly different badges is much more effective.

All staff need to be clear on how to deal with someone suspected of not having appropriate accreditation.

For media communications associated with an emergency, a bit of media savvy can save a lot of heartache later on. Assign and train one or two specific people to speak with the media in such instances, this ensures your message stays consistent and limits the possibility of someone being taken off guard and out of context. Educate your staff and volunteers as to why this system is in place and the people they are to refer media queries to.

Some of the things that are important in this regard are as follows:

- Prepare and issue a statement as to known facts and what is being done to handle the situation.
- To the extent possible, script responses to expected questions from the media.
- Don't speculate about what has happened. If the facts are not known or are unclear, say that relevant information will be forthcoming when available.
- Many media people will attempt to force you to provide 'breaking news' of an event in progress, the more sensational the better. They will ask provocative questions in an attempt to elicit such a response. Don't answer the question as asked; respond by repeating the relevant facts in your prepared statement. Don't 'shoot from the hip'; only answer questions within the scope of your prepared statement and your prepared responses. Others should receive a 'no comment' response.
- Never try to outwit the media in a verbal contest. You will lose every time, either by saying something you shouldn't or giving them an opportunity to report your statement out of context. Both are disasters.
- Terminate the interview once the foregoing process concludes, with a statement as to how further communications will be handled.

CHAPTER 11: MAJOR EVENTS

Major events can bring significant economic and social benefits to Nova Scotia. Bidding on and hosting a major event requires a big commitment of people and money.

CHAPTER MODULES

- 11.1 What are Major Events? (page 81)
- 11.2 So, You're Thinking about a Major Event for Your Community (page 82)
- 11.3 Bidding on Sports Tourism Events (page 83)
- 11.4 Role of Events Nova Scotia (page 85)

Key Takeaways

- ❖ If you're thinking about a major event for your community, make sure you have what is needed – the facilities, services, infrastructure and people – and you can get the money needed.
- ❖ Events Nova Scotia can help you bid on major events.

11.1 WHAT ARE MAJOR EVENTS?

Major events are those that have the potential to bring economic, social, health and community benefits to Nova Scotia through business, sport and cultural events. Hosting major events can offer many benefits to the province, including:

- Increase awareness of Nova Scotia – as a place to visit, do business and live
- Generate tourism activity – both during and after the event
- Generate new investment including new jobs
- International and national media coverage
- Enhanced infrastructure
- Increased economic activity including increased tax revenue
- A range of social benefits including:
 - Community development
 - Volunteer development
 - Leadership development

- A forum to celebrate athletic, artistic and cultural excellence
- Contribute to pride in our province and its achievements

Major events are defined by Events Nova Scotia to include:

- Mega Events – global reaching events that travel to new destinations each year (e.g. FIFA Women’s World Cup)
- Major Events – travelling type events with new destinations each year. These often involve a bid-related process, attract a large international audience and have extensive media coverage, with event budgets in excess of \$500,000 (e.g. IIHF World Hockey Championship)
- Signature Annual Events – mostly recurring events with strong international appeal, unique to Nova Scotia and reflecting our brand and culture, with event budgets in excess of \$100,000. (e.g. Celtic Colours International Festival)
- Growth/Special Events – event that has developed with the last 5 years; could be a unique or one-time event, such as an anniversary; a smaller event with regional/local focus but with the ability to evolve and develop into a Signature or Major Event (e.g. Titanic 100)

Major Events

“A major event not only has competitors but also spectators, followers, officials and sponsors. Treat them all well; you want all of them serving as goodwill ambassadors for your community to the rest of Canada, and to the world. You also never know who they might represent or be associated with. Perhaps they will like their experience and return to visit, set up a business, host a conference, etc.

Bob Powell

**2011 Canadian Senior Curling Championships
Digby**

11.2 SO, YOU’RE THINKING ABOUT A MAJOR EVENT FOR YOUR COMMUNITY²

If you are thinking of hosting a major event in your community, there are lots of factors to take into consideration.

1. What is your vision? What type of event are you thinking of? Sports, arts, music, cultural, special interest, other? Will it be a one-time event or do you want to start something and build it into a major annual occurrence?
2. Will the event bring economic and business benefits to your community? Are they sufficient to justify the effort and investment that will be required?
3. Are there possible major partners that you can work with?
4. Does your community or region have the capacity to host major events? Do you have:

² Some of the content in this section has been extracted, with permission, from Canadian Sports Tourism Alliance (CSTA) resources, particularly the Sport Event Bid Template, 2010.

- a. The facilities required for the event itself. For example, if you want to host a major hockey tournament or curling event, you will need several ice surfaces of the right size in close proximity. If it is a cultural event, you may need large indoor and/or outdoor theatres.
 - b. The infrastructure for visitors and participants. Are there enough hotel rooms (of a suitable quality) and restaurants available within an easy drive, at the time of year you want to host the event? If you want to hold an event in mid-July, peak tourist season when businesses are already busy, you may find less than enthusiastic support. On the other hand, if your event is in January when many businesses are closed, this will also pose challenges.
 - c. Do you have good transportation access? Are you reasonably close to an airport if the event will attract participants from outside the province? What about proximity to highways? Public transportation?
 - d. Are the human resources available – For the organizing committee? Volunteers for the event itself?
 - e. What about suppliers for all the equipment and services you will need?
 - f. Have you or others in the community had some experience with this type of thing? Do you have the expertise to pull it off?
5. Can you get enough support locally for the event – From the municipality? From the general public? From the local/regional business community?
 6. What will be the legacy to your community/region? Will it be worth the effort?
 7. Are there other significant events happening in the region during the same time period?
 8. What is it going to cost and where will the money come from?
 9. Is there good potential to attract partners and sponsorships?
 10. Are there big risks – Of losing money? Of the event being cancelled? How will these be addressed?

Hosting a Major Event

“Hosting a major event can be a daunting endeavour for your community. Prior to submitting your bid proposal, do your homework. Ensure you can answer all the questions that will be asked, pick the committee carefully and ensure that they have the confidence to successfully host the event.”

Bob Powell

**2011 Canadian Senior Curling Championships
Digby**

If you have serious concerns about any of these issues, it may be preferable to start with a smaller festival or event and build up to something major.

11.3 BIDDING ON SPORTS TOURISM EVENTS

Many major events fall into the sports tourism category, one of the fastest growing sectors in the tourism industry with over 200,000 such events occurring annually in Canada. The types of sports events include:

- Multi-Sport and Major Games
- Amateur and Professional sport leagues and events

- Amateur single sport events
- Manufactured or created sport events
- Intercommunity sport events

Most sport tourism events are awarded through a bid process although there is an increasing number of manufactured sports events such as the Bluenose Marathon, Cabot Trail Relay, The Not Since Moses Run.

If you are thinking of bidding on a sports event talk to Events Nova Scotia (see the next section) and join the Canadian Sport Tourism Alliance (<http://canadiansporttourism.com/>). Membership is reasonable and they have a wealth of resources to help with the bid process (*Sport Event Bid Template*), contracting and evaluating your event (*Sport Tourism Economic Assessment Model*). As well, they distribute requests for bids from national sport organizations.

The bid process, particularly for national and international events, can be a lengthy and complex process and it is highly competitive. You want to make sure that you have a clear strategy that sets out what types of sports tourism events you are targeting and then only select events to bid on that fit your strategy and where you have some chance of success.

The organizations that own the rights to the event oversee the bid process. They provide documentation or an RFP (Request for Proposals) that outlines what they are looking for.

Interested host communities assess whether they can meet the requirements, and prepare bid documents. They need to carefully consider the risks and identify how they are going to address each. CSTA's *Sport Event Bid Template* talks about these risks. Success factors in bidding for sports tourism events include:

- Good research and networking.
- A well-thought out and prepared bid document that covers all the topics.
- Solid technical, financial and operational information.
- Clear and compelling reasons for hosting the event.
- Established partnerships and support, including government partnerships.
- Relevant experience and expertise within the community.
- Appropriate facilities that meet the required technical standards.
- Necessary community infrastructure and support.
- A solid marketing and communications plan.
- A detailed business plan including financial projections.
- A critical path for meeting all necessary deadlines.
- Plans for dealing with 'worst case scenarios'.

Helpful Tip: Bidding for Major Events

Build on and highlight your strengths, hospitality, local culture and heritage, and entertainment. Special places are part of what will make your event unique and memorable.

A World Championship Hockey Game in the end is another hockey game. It's everything around the game that makes it an event!

- A detailed operational plan, including plans for servicing the athletes/teams and delivering a memorable experience for everyone.

11.4 ROLE OF EVENTS NOVA SCOTIA

Events Nova Scotia (<http://eventsnovascotia.com/>) can provide support to the organizers of major events and a link to government programs and requirements. They can also work with organizations wishing to host major events to help secure the event and build partnerships and sponsorships. As well, they can share best practices and provide access to a database of volunteers (see Chapter 7.4). If you are thinking of hosting a major event, contact Events Nova Scotia early in your planning process.

Events Nova Scotia takes a strategic approach to their support of major events, paying particular attention to the benefits the events can bring to the province. In assessing which major events to support, the following criteria are considered:

- Economic Impacts
- Media Impacts
- Diversity of the event – arts, culture, sports, etc.; time of year, other major events ongoing in the same time period
- Partnership potential
- Funding availability from a variety of sources
- Attraction and market appeal of the event to out-of-province visitors and alignment with the Nova Scotia Tourism Strategy
- Quality of the experience
- Support for the Nova Scotia brand
- Risk analysis – for revenue, potential to cover any losses, expertise of the organizing group, potential for cancellation, etc.
- Legacy for the province

You can review the province's Major Event Hosting Policy at

<https://www.novascotia.ca/treasuryboard/manuals/PDF/300/30705-01.pdf>

CHAPTER 12: MARKETING YOUR FESTIVAL

There are many different marketing techniques you could use. Today, on-line marketing (including websites) and social media are core promotional tools for festivals and events.

CHAPTER MODULES

- 12.1 Introduction (page 86)
- 12.2 Glossary of Key Terms (page 87)
- 12.3 The Marketing Plan (page 88)
- 12.4 Website (page 90)
- 12.5 Social Media and On-Line Marketing (page 92)
- 12.6 Other Promotions (page 96)
- 12.7 Promoting Your Festival through Tourism Nova Scotia (page 98)
- 12.8 Packaging Your Festival and Event (page 98)
- 12.9 Publicity and Media Relations (page 99)
- 12.10 Public Relations (page 101)
- 12.11 Measuring and Tracking Results (page 102)

Key Takeaways

- ❖ No matter how small your festival, you still need a marketing plan that identifies your target markets and how you are going to tell them about your festival.
- ❖ The Internet is key – and that means having a great website that becomes the hub of your on-line marketing.
- ❖ Social media can be very effective and provides opportunities traditional marketing does not. But, it needs expertise, time and some money.
- ❖ There are a number of other promotional activities that could work for your festival.

12.1 INTRODUCTION

When people think about marketing, they often think about traditional advertising like radio spots, newspaper advertisements and flyers. But these traditional media are only a small piece of the marketing puzzle for festivals and events today. Growth in on-line marketing and in social media has made it possible

for festivals to promote themselves with a more limited budget – though you still need time and money to do social media successfully.

This is not to say that on-line marketing and social media are the only promotional tools for you. Other promotional activities can be effective in generating visitation, even with a limited budget. The key is to leverage opportunities for getting others to assist you in marketing your festival or event, such as:

- Your sponsors –they can include you in their social media promotion, website links or email blasts to clients/suppliers.
- Your community organization partners – service clubs, the municipal government and its parks and recreation department.
- Your tourism partners in the area, including visitor information centres.
- Your local and regional tourism marketing organizations.
- Tourism Nova Scotia through their festival and event marketing program and novascotia.com.
- Your local media.
- Provincial media, including Halifax media (and, depending on the scale of the festival/event, potentially national media as well).

This chapter first looks at some key marketing terms and preparing a marketing plan. It then addresses the major marketing tools available to a festival – your website, on-line marketing, social media and other tactics. Finally, it talks a bit about tracking and measuring your results, and adjusting your marketing activities in response to your findings.

12.2 GLOSSARY OF KEY TERMS

TRADITIONAL MEDIA

Traditional media refers to early mass media and often includes: TV, radio, cinema, music, and print (e.g. newspaper, magazines, books, brochures, signage, tent cards, etc.) One of the hallmarks of traditional media is that it is a *one-way communication*, and often doesn't allow for immediate engagement. Traditional media are often very expensive.

NEW MEDIA

Digital communications are known as *new media*. New media includes popular social media platforms like Facebook and Twitter, but also includes less-considered channels like e-zines (digital magazines), text messages, blogging, and web advertising. Many festivals and events prefer new media marketing because it can be less expensive than traditional advertising. New media is typically a two-sided communication, making it easy to engage followers and measure your impact.

PUBLIC RELATIONS (PUBLICITY, PR)

Public relations (or 'PR') is all about your festival's *image*. When it works, PR is basically free advertising, and can generate great word-of-mouth. The goal of PR is to get media exposure, which is especially powerful

because it is seen as *unbiased*. Developing a solid PR strategy is essential to success. Getting involved in your community, particularly if you are in a small community, is a big part of PR.

SOCIAL MEDIA MARKETING

Social media marketing aims to increase awareness and boost sales through the use of social media platforms. The goal is to create/share interesting content that your followers will share with their own social networks.

12.3 THE MARKETING PLAN

No matter how small your festival, you should prepare a marketing plan in conjunction with your initial planning and budgeting. You need to clearly identify what markets you plan to attract and how you are going to tell them about your festival.

Marketing incorporates the 4 – P's, essentially covering all aspects of the festival as illustrated below:

Product	<ul style="list-style-type: none">• Entertainment & Programs• Food, beverage, retail vendors• Employees and Volunteers
Price	<ul style="list-style-type: none">• Prices for admissions, entertainment, etc.• To cover costs and generate a profit
Place	<ul style="list-style-type: none">• How customers buy your festival, e.g. on line, on the phone, at the gate,
Promotion	<ul style="list-style-type: none">• The tools used to take your product to market and generate sales, e.g. online marketing, social media, public relations, advertising,

The marketing plan should address the following:

1. An assessment of the marketplace situation:
 - The available markets for the festival
 - The competition, if any, at the time of the event

2. Your objectives:
 - The priority target markets
 - The levels of visitation and revenues desired
 - Other objectives for the event
3. Your marketing strategy:
 - How you are going to ‘position’ the event to attract the market’s interest. Positioning involves a statement as to the key and unique features of the event: who the event or activity is aimed at; what is special about it; why it’s a good idea to attend; when it will take place; where it will take place.
 - Where do your markets generally look for information? What media platforms are they most active on?
 - How are you going to reach the markets? The various marketing tactics you intend to employ and a timeline for execution.
 - Your partners and sponsors and how you intend to work with them in marketing the event.
4. The marketing budget and plans for tracking results:
 - Specific marketing initiatives – the tools, the message, the schedule
 - Budgets for each marketing initiative,
 - Tracking methods to measure the effectiveness of particular marketing initiatives

BRANDING

Having a recognizable brand is helpful, particularly one that communicates the unique appeals of the event and its market positioning relative to other events. The brand can also be used by partners and sponsors in helping you promote the event and in connecting their organization to the event. This is important, particularly for sponsors who want to benefit from the publicity value of providing support for your event.

Helpful Tip: Logos and Brands

When developing your logo and brand, think carefully about where it will be used. Will it hit the front of a T-shirt? A TV ad? A large screen at your venue? The logo needs to be simple and striking, and visible at different sizes and from a distance.

You should have a logo – something simple and easily reproduced. Use it in all your marketing materials and promotional activities. You will want to stick with the same brand and logo so it’s worth taking some time (and perhaps getting some help) to create these pieces.

MARKETING TOOLS

Some of the most commonly used festival or event marketing tools include:

- Internet – website, blog, e-bulletins/email
- Social media (Facebook, Twitter, etc.)

- Print – posters, flyers, postcards, programs, etc.
- Direct mail of flyers and postcards to previous event or activity attendees, friends, donors and sponsors
- Outdoor poster sites
- Word-of-mouth (friends, clubs)
- Media advertising: in print publications (newspapers and magazines), radio and TV. Only consider paid advertising if you have at least \$1,000 extra in your budget. Depending on the nature of your event, you may wish to use community newspapers as a good way to reach your local audience.
- Media releases: a media release is the basic tool used for submitting information to the media. An effective media release answers: What the event or activity is; Who created and is running it; Where it will take place; When; How much it costs to attend; and contact information for both ticket sales, if applicable, and the person that media can call if they want further information.

It's a good idea to start spreading the word of your event as soon as you can via social media. It will take a while to catch on. Use 'teasers' but don't give away any major announcement until you have all your planning completed and contracts confirmed. These teasers will attract those planning vacations ahead of time.

Create a timeline for your marketing that fits your festival or event. Six months out from your event date may be a good time to put out your first official press release, but nine months might be best for another event. Even if you don't have your full roster of entertainment confirmed, announcing the when and where as well as ticketing information will start the conversation.

Be sure your website and social media sites are up and running before you send out the release. Nothing is worse than promoting an event when people can't follow up on the promotion on-line.

If you do radio promotion, alternate between ads and contesting to stretch out your reach. For print ads, chose a section of the paper that best fits your target market (i.e. business, arts and culture; sports).

The various marketing tools at your disposal are explained in greater detail below.

12.4 WEBSITE

The Internet is a key component of marketing for festivals and events. People are spending more and more time on-line, and rely on their computers, phones and tablets for information. From local supporters who will help you spread the word about your festival to people planning their vacations and weekends, on-line marketing will assist you in promoting your event both near and far. The first thing you need is a good website.

Your event website should be the hub of your on-line marketing. Your website is where you will send people for all the information about your event (dates, locations, schedule, tickets, etc.), much like an on-line brochure. All other on-line marketing activities will grow from your website.

It's tempting to rely on social media platforms, like Facebook, for this purpose but keep in mind that you don't own your Facebook page. A website is a space that belongs to you and won't be subject to the constant changes that can occur with social media platforms.

There are several free on-line tools (WordPress, Weebly, Wix) that allow you to easily build your website. They also offer upgraded accounts for more options and personalization.

Websites should be easily found by search engines like Google and Bing, so be sure to do some research into using keywords and optimizing your SEO, or search engine optimization.

Your website should include the following:

- Contact information
- Date(s) and time(s) of event
- Prices and ticket sales (if applicable)
- Event schedule (performers, programs, etc.)
- A link to sign up for your e-newsletter
- Links to social media profiles
- Information on volunteering for your event
- Information on sponsoring your event
- Recognition of event sponsors
- A brief history of your event, including photos if possible

Keep your website simple and easy to read and navigate. The more times someone has to click to find the information they're looking for, the more likely they are to give up and leave your site. Your website should be mobile-friendly due to the growing use of smart phones and other mobile devices.

Make sure that your sponsors and partners know about your website so that they can link to you from their sites if appropriate. Also, be sure to include your website address on all your promotional material (posters, brochures, etc.).

Add Facebook, Twitter and other social media links to your site and invite interested parties to follow your event for up-to-the minute news on your festival. This also grows your overall social media reach.

GOOGLE ADWORDS

Google offers an opportunity to further promote your website through their AdWords program. This is a paid service that, depending on the use of key words and search engine optimization, allows you to appear at the top of a Google search page.

AdWords can be cost-prohibitive depending on the size and budget of your festival, but it is worth exploring for added promotion. Having your website set up with the proper SEO (Search Engine Optimization – activity that attempts to improve search engine ranking so your event will come out higher on the list) information will help you show up in more searches as well.

12.5 SOCIAL MEDIA AND ON-LINE MARKETING

Arguably, the most effective and wide-reaching promotional tool for every event is on-line marketing. The capabilities of on-line marketing are wide-reaching and just being good at Facebook and Twitter does not mean your on-line marketing campaign will be successful.

Social media can be confusing, simply because it is constantly growing and changing. The key to successful social media promotion of a festival is choosing which platform(s) will work for you, and establishing a plan to use it/them, and then putting it in action. Social media is not about broadcasting your message, but engaging others, so be sure to listen as much (or more!) than you talk.

Social media management should be a dedicated role for a qualified staff member or trusted volunteer; budgeting the manpower to manage your platforms will guarantee consistency and quality. If your designated manager doesn't have any experience in running social media for an event or business, invest in training so you'll experience all the benefits this powerful tool has to offer.

Helpful Tip: Social Media

Once you have 'grabbed' your audience on one of the social media platforms, it's important to engage with them regularly. Don't ignore them!

Building a strong social media presence takes dedication and patience. It won't happen overnight, but if you invest in it - put the time in, the necessary human and financial resources, and develop a plan, social media can be an immensely powerful marketing platform.

FACEBOOK

Facebook is the most popular social network and is the key platform for events and festivals. Set up a page for your festival, making sure that you include all the relevant information and great images for the cover and profile photos.

To initially grow your follower base, be sure to share the page with all relevant supporters, sponsors and volunteers. Anyone associated with the event should like the page, and in turn spread the word to their network of friends.

Leading up to your event, create a content plan for what you will post on Facebook. Posting daily is optimal, but several times a week will work. Don't be afraid to repeat information regularly, as not all of your

followers will see all of your posts. Share fun images and videos, ask questions, announce event details, be friendly and engaging; think about what you enjoy seeing on your Facebook feed and replicate it.

Whenever possible, keep the text in your Facebook posts to a few brief and clearly written lines. Most social media users suffer from TLDR, aka Too Long Didn't Read, disease.

Make use of Facebook's scheduling tool so you don't have to be online all the time. This tool lets you schedule your posts hours, days, weeks or months ahead of time and will make regular posting of content far easier.

Be sure to pay attention to comments and messages on Facebook. If someone asks a question, answer it as quickly as possible. If someone has a complaint, address it speedily; sometimes a simple "We're sorry to hear that ... here's what we can do to fix it" is all someone needs to see to feel their complaint is understood. If someone makes an inappropriate or offensive comment, don't be afraid to delete it. Engaging in conversation with your followers lets them know you're listening.

You can learn a lot about your followers through the **Insights** tab at the top of your festival's page. Clicking on People will give you a look at where your followers are from, their age and sex. Insights also allows you to see the reach (how many people saw the post), as well as the engagement (like, comments and shares) for your Facebook posts. Paying attention to this information will help you discover what types of posts (photos, videos, links, etc.) are most popular with your followers.

The average organic (i.e. with no paid promotion) reach for a post is between 5% and 20% of your followers. Facebook also allows you reach more people through Facebook advertising.

For a small investment (as little as \$1 a day), advertising allows you to target posts to specific locations and audiences. You're also able to promote your website, and your festival's page to Facebook users.

In order to run a paid Facebook campaign, you'll have to sign up for a Facebook Ads account at www.facebook.com/advertising. This site gives step-by-step instructions on setting up your account and planning your first campaign. Also take the time to read through the term of service so you don't violate any of Facebook's rules regarding ads.

Budgeting for Facebook advertising guarantees that information about your festival will reach more people. The more you spend, the larger your post's potential reach; as little as \$20 can put your information in the timelines of up to 5000 people.

Similarly to Insights, Facebook advertising provides information on the reach and engagement for your promoted posts, which is helpful when you're evaluating your promotional spending after the event; you'll be able to determine your CPM (cost per 1000 views), which is a standard measurement for online marketing efforts.

TWITTER

Twitter allows you to communicate with followers in brief (140 character) messages. Due to the speed at which this social platform moves, it's important to tweet more often than you would post to Facebook.

Set up an account with a relevant user name for your festival, making sure that you include all the relevant information and images for the cover and profile photos.

There are third party applications (Hootsuite, Tweetdeck, Buffer, etc.) that have scheduling options for Twitter which let you plan your tweets in advance. Twitter also supports images, so make use of visuals to catch attention.

Be sure to follow accounts that are relevant to you (other festivals, local businesses, sponsors, entertainers, etc.) and engage in conversation. Come up with a hashtag (i.e., #ourfestival2015) that you'll use during the festival and share it so that attendees can use it as well; this will allow you to search for the hashtag in Twitter and see what people are saying. Don't forget to engage in conversation and thank them for tweeting about your event.

Do not automatically link your Facebook to Twitter; this is tempting because it may save some time, but these social platforms have different audiences and you should tailor your message for each one.

You can analyze the performance of your tweets at www.analytics.twitter.com. Twitter also offers advertising to promote tweets or accounts. To find out more, visit www.ads.twitter.com.

INSTAGRAM

Instagram is the fastest growing social media platform, and is a great opportunity to showcase your festival through photos. Keep in mind that Instagram is a mobile app and can only be used on smart phones and tablets. Both Apple and Android versions are available. Instagram accounts can be viewed on a desktop or laptop computer, but photos can only be posted via the app.

Come up with a hashtag that you'll use during the festival and share it so that attendees can use it as well; this will allow you to search for the hashtag in Instagram and see what people are sharing. Don't forget to comment on their photos and thank them for attending!

There are several apps that allow you to "regram" photos in Instagram; very much like retweeting in Twitter, this allows you to share and engage with people at your event.

To see how your Instagram posts are performing, you can use a third party site such as www.iconosquare.com. Instagram doesn't currently have widespread advertising options available, but it's expected that this will roll out in the near future.

For more information on specific platforms, check out the resources below:

- Mashable's Social Media Blog <http://mashable.com/category/social-media/>
- Yelp Support Centre <https://biz.yelp.ca/support>
- How To Use Twitter (via Wiki) <http://www.wikihow.com/Use-Twitter>
- How To Use Facebook for Business (via Facebook) <https://www.facebook.com/business/overview>
- How To Use Pinterest (via Wiki) <http://www.wikihow.com/Use-Pinterest>
- How To Use Instagram (via Wiki) <http://www.wikihow.com/Use-Instagram>
- HubSpot's Marketing Blog <http://blog.hubspot.com/marketing>

OTHER ON-LINE MARKETING TECHNIQUES

BLOGS

A blog is a great way to tell the story of your festival. Unlike Facebook and Twitter, where short messages work best, users visit blogs expecting to read. You can host a blog directly on your website or use a third party site (Blogger, WordPress, Tumblr).

Like other social media platforms, planning is key for a successful blog; schedule what you want to write about and when, and be consistent. If you want loyal readers, you need to create new content on a regular basis. And use your other platforms to promote your blog; i.e. post the link to a new blog entry on your Facebook and Twitter accounts, using teaser text ("Want to know who we've booked for our festival? Check out our blog for details!") to spark interest.

Take pride in your social media platforms, as they're the way many people will be introduced to and learn about your festival.

- Use quality photos; you can use a phone, but make sure photos are large, in focus and well lit.
- Assume your followers know nothing about you; if you post a photo, make sure to explain what's happening/who is featured in that photo.
- Don't be afraid to repost content; due to the nature of social media, not all your followers will see every post, so recycling appropriate (or 'evergreen' – continually relevant, fresh) content is a good practice.
- Pay attention to grammar and spelling; don't use text speak (OMG! U R AWSM!), or overuse exclamation marks or emoticons.
- Keep it professional; your festival social media accounts are the voice of your event. Avoid sharing irrelevant or offensive posts and memes, and do not express personal opinions. Speak as "we" instead of "I", keeping the tone light and conversational.

EMAIL MARKETING

Email marketing is a great way to reach people who are interested in your event directly. CASL (Canadian Anti-Spam Legislation) requires you to obtain permission from an individual to contact them by email. It will take time for you to build an email list, but it will be worth it; the quality of your list (i.e. people who are actually interested in your event) is far more important than the size.

Some ideas for building lists include:

- Including a sign-up form on your website and Facebook page
- Promote your list on social media
- Run a contest, including email on the ballot along with an opt-in for receiving emails
- Ask your volunteers, supporters, sponsors and friends if they would like to be added to the list
- As you chat with people about your festival, ask if they would like to be added to your list

There are free online newsletter applications (MailChimp, Constant Contact) that will allow you to create a sign-up form, manage subscribers and design emails, as well as keep track of statistics for your campaigns (open rates, etc.). They also offer upgraded accounts for more options and storage.

Plan your email communications in advance, keep them short and filled with valuable information, and resist the urge to send emails too often. Depending on your event, monthly or bi-weekly emails will be enough, and won't be regarded as unwanted spam by your subscribers.

Helpful Tip: Email Marketing

Email is also one of the most relevant online marketing tools as 'open' rates can be as high as 20% -30% of an email list. Keep messages relevant and to the point, and build respect among your fan base. Don't forget about this tool. It is still very effective.

12.6 OTHER PROMOTIONS

A number of other promotions can be effective in building awareness and motivation to attend a festival.

BROCHURE/FLYERS/POSTERS

Although not highly recommended due to high costs and low ROI (return on investment), depending on your event and desired reach of exposure, a flyer or brochure may be useful. It can give value. For example, it gives you a 'leave-behind' when pitching potential partners or sponsors. But, think carefully about whom you want these pieces for and design them accordingly.

This is an area where partners and/or sponsors can really help. By featuring them in the brochure you have a strong case for them to fund some or all of the costs of design and printing. Identifying a local print shop to sponsor with an in-kind print of materials is also an option.

MEDIA ADVERTISING

Media advertising includes newspaper, TV, Radio, billboards. It is expensive and is also limited to your immediate area in terms of promotion. Local radio and newspapers will get the attention of locals, but if you want to reach outside of your town, this is not the avenue to go. TV is very expensive and unless you have a major TV sponsorship probably won't be in your budget for the first few years, if ever. Billboards are also expensive and reach is limited.

If you do decide to go this route, it's another area where it would be worthwhile to get sponsors in particular to help out by getting them to place ads on your behalf and/or add a banner about the festival in their own advertising.

Ways to make your advertising dollar go further:

- Local printer: he or she should have some expertise in ad design and layout; there are also many freelance graphic designers who are willing to work on spec for experience and portfolio building
- A local marketing partner selling a product complementary to yours
- Your local newspaper, radio station, etc.
- Your local tourist association coordinator
- A local art or communications instructor/teacher

The key point is get help from someone who has expertise in marketing and communications techniques.

CONTRA ADVERTISING

Contra advertising, or swap advertising, has long been a factor within the tourism sector. Basically, contra involves trading media coverage for some of your product. This is often done for contests, where a resort, for example, gives a free weekend as a prize for a radio contest and receives plugs on the air or actual advertisements at no charge.

SPONSOR PROMOTION

As mentioned earlier, it is a good idea to work with your sponsors on marketing the festival. This can include any or all of the following:

- The sponsor paying for some or all of the festival's advertising.
- The sponsor paying for a portion of the advertising through a cooperative arrangement with some or all of the other partners and sponsors.
- The sponsor including promotional messages for the festival in its own advertising to its own target markets.

COMPLIMENTARY ADMISSIONS

VIPs, sponsors, police and emergency personnel families as well as volunteer families can be provided with complimentary admissions as a thank you for their support. This makes them goodwill ambassadors for the festival. This is something that needs to be regulated if you have more than one show and limited seating. Having all 100 volunteers show up to the same show will take seats from last minute door ticket sales. Limit free access to certain shows or limit the number of free tickets per show.

APPRECIATION EVENTS

Events held in appreciation of the help received from staff, volunteers, sponsors, emergency personnel, etc. are successful in building affinity for the event. These measures build a network of ‘friends’ of the festival.

12.7 PROMOTING YOUR FESTIVAL THROUGH TOURISM NOVA SCOTIA

Tourism Nova Scotia (TNS) offers help to festival and event organizations across in the province in planning and marketing. To be eligible, festivals must have the ability to influence and motivate travel, be open to the general public and welcoming to visitors. Check at <http://tourismns.ca/festivals-and-events> for details.

Eligible festivals can be listed on novascotia.com and may also get exposure through other marketing channels. Listing your festival is simple; there is a tutorial available on-line through the website above. You will need to have a brief description, some photos, a link to your website and possibly a short video.

12.8 PACKAGING YOUR FESTIVAL AND EVENT

As mentioned in Chapter 6, it could be valuable for you to work with tourism partners in the area, such as accommodations, restaurants and attractions, to build packages that feature your festival or some element thereof.

A package is a collection of tourism products and services that are sold as a single product, in one transaction, at a single price. The idea behind packaging is to create and market a product that is customized for a particular target audience; or for a particular festival or even a particular element within a festival.

Packaging is not necessarily about discounting the price; what it is really about is offering a complete experience at a good value price, and making it easy and convenient for the customer to buy. Savings can be part of it, but added value is more important and often can be more effective in generating sales.

Successful packages are ones that offer unique, appealing experiences for purchasers, along with good value. Tourism today is very much an experiential business, and ***a well-designed package has the marketing advantage that it is built around outstanding experiences.***

Keep the following key principles in mind when developing a package:

- Careful planning and sufficient lead time are vital to make sure the package is trouble-free and has time to sell.
- Your festival will be the core ‘demand-generator’ but consider adding other appealing experiences and activities to expand the market appeal.
- Ensure that the package is complete – all necessary services should be included. This will mean working with regional tourism partners who can provide accommodations, possibly food services and other activities.

- Offer a benefit or a bonus – savings and/or added-value features, such as a back-of-the stage experience.
- Price the package competitively.
- Ensure that individual package components are compatible.
- Keep quality consistent.
- Pay attention to the details.
- Provide customers with maximum flexibility.
- Keep customers fully informed – especially where changes are necessary.
- Establish a fair refund and credit policy.
- Make sure that the package is profitable.

Tourism Nova Scotia provides marketing support for packages on novascotia.com. Get the details and the guidelines for packages at <http://tourismns.ca/packages-and-deals>.

Chapter 7 and Appendix 4 of the ‘Guide to Marketing Your Nova Scotia Tourism Business’, found at <http://tourismns.ca/business-development-guides>, provides additional details on developing and pricing packages.

12.9 PUBLICITY AND MEDIA RELATIONS

The media organizations in your community and in the region can be extremely helpful in promoting your festival, in a number of ways, including:

- Arrange radio/TV broadcasts from the festival site during the event – morning shows, newscasts and weather forecasts, visiting VIP interviews and call-in shows all lend themselves to on-site broadcasts. Also, interviews with festival organizers, entertainers and VIP attendees can be done on-site or in-studio.
- Host an invitational media event prior to or at the beginning of the festival to introduce the media to the program and answer their questions. It helps if you offer some inducements, such as complimentary passes for them and their families.
- Prepare stories on your event, preferably with photos, that are suitable for publication by the media, and provide them to the appropriate media people.
- Your sponsors and partner organizations could hold their news conferences at the festival.
- You might offer the festival site to fundraising organizations for their special events during your off-hours (such as a pancake breakfast for The United Way). The other organization will attract and coordinate the media themselves, with your festival benefiting at no cost and with little effort expended.

Create a newsworthy event of interest to the media’s audience and you will have their cooperation in telling the story.

Given its importance to a festival, publicity and media relations deserve special attention. This is an affordable and powerful means of reaching your target audiences. Most festivals have a number of newsworthy aspects and the media organizations will usually be pretty cooperative. It's a win-win relationship.

MEDIA TOOLS

Where the media is being targeted to communicate your information, there needs to be an appropriate approach to accomplishing this. The tools involved include press releases, feature stories, public service announcements (PSAs) and in-person interviews. These are discussed below.

PRESS RELEASES

Press releases will be an important part of your media activity in advance of the festival and when really newsworthy events occur.

Normally a press release is emailed to the target media on a designated release date so that they all get it simultaneously. The latter point is critical; in the media, news is only news for a short, fleeting period. Yesterday's news is of little interest.

There is a science in designing press releases and in getting them used by the media. A good press release has the following features, in this order:

1. FOR IMMEDIATE RELEASE should be printed at the top left margin, just under your letterhead.
2. Two lines below put in a headline in boldface type.
3. Put in a 'dateline' – the community your press release is issued from and the date you are distributing it.
4. The first, introductory paragraph of text should capture the essence of the announcement. It should be an attention-grabber and contain the key relevant information, such as the five 'W's' (Who, What, When, Where and Why).
5. The main body text to follow provides more particulars and a fuller description.
6. Contact information is provided, including the name, title, email, phone and fax numbers of your spokesperson, plus their home/cell phone number. (This number is important because reporters work to deadlines and may not be able to call during business hours.) This information can be provided at the end of the release, or at the top, following the headline.
7. The website address of your organization and links to more detailed information available.
8. The press release should be 1 or 2 pages maximum, typewritten, double-spaced and printed only on one side of the page.

There are many helpful websites on how to write a proper press release.

FEATURE STORIES

Some media will be interested in a feature story about your festival, about your organization or about a performer. It makes it easy for them to pick it up, as is or in edited form, saving them the research effort.

PUBLIC SERVICE ANNOUNCEMENTS

PSAs are free announcements made by media, usually radio, about a forthcoming event of interest to its audience. Some of the initiatives we discuss later will lend themselves to this. And the price is right!

PHOTOS AND AUDIO-VISUAL MATERIALS

It's a good idea to provide high resolution photos to the media along with your press releases or feature story, preferably featuring a person involved in the story, or an aspect of it. Ideally, these should be of professional quality. Captions describing who/what is in the picture are important and need to be provided.

Making them available on your website is also a good idea.

NEWS CONFERENCES

These are useful when really big news is in play, such as a major announcement. You will have to convince media invitees that the news conference really warrants their attendance, which is easier to do if you have an ongoing relationship with them but can be very difficult otherwise.

News conferences make sure everyone gets the same information simultaneously and gives them the opportunity to get questions answered immediately. It's important to make sure all the people who might be questioned are in attendance.

Attendees should be provided with your news release, along with supplemental background material as well as pictures and biographies of the key people and organizations involved.

MEDIA FAMILIARIZATION VISITS

Invite media people to visit the festival. They should receive complimentary access accompanied by a media information package, making sure they get the information you want them to publish.

12.10 PUBLIC RELATIONS

Getting your community on side and keeping them there can be a considerable challenge, but it is vital that it be addressed.

Municipal councillors, the mayor and other community leaders are crucial to have on your side. Meet with them on an individual level in your planning stages if possible. They will more than likely have a good handle on potential issues and community concerns. Invite them to your public consultations and invite them to press conferences or a media launch. Give them speaking opportunities where appropriate and engage them directly in activities at the event.

We also discussed earlier the idea of inviting tourism frontline staff to the event on a complimentary basis to empower them as goodwill ambassadors for the event. This will also be helpful with this issue.

12.11 MEASURING AND TRACKING RESULTS

“If you can’t measure it, you can’t fix it”. You need make an effort to measure the impact of your various promotional efforts. Knowing which efforts are generating visitation and sales tells you where to invest next year and where it is not worth spending your money.

You should have a strategy for tracking results before you start implementing your marketing efforts. With today’s technology, it’s much easier to collect and analyze key metrics. Here are some ideas:

- Survey your visitors and find out how they heard about your festival. This is discussed in Chapter 13.
- If you contracted with an on-line ticketing company, watch the daily reports to see how well ticket sales are doing and which of your marketing activities are working the best.
- Website analytics can tell you where your website visitors are coming from and which ones are linking through to ticket purchases.
- Look at your social media engagement scores.
- If you offer any coupons or specials, track how many are returned.

For each key marketing activity, try to determine how many visitors or how much revenue was generated, and compare this to what you spent to get your ROI (Return on Investment). Think carefully about the results and what they mean for how you spend your marketing dollars next year.

CHAPTER 13: POST EVENT EVALUATION AND PLANNING FOR THE FUTURE

When the festival is over, it's not really over. There are some other things to do to make sure it goes more easily and successfully next time around.

CHAPTER MODULES

- 13.1 Evaluating Attendance and Economic Impacts (page 104)
- 13.2 Evaluating the Event (page 105)
- 13.3 Keeping Your Friends (page 106)
- 13.4 Countering Volunteer Burnout (page 106)
- 13.5 Building on Success- Growing and Improving the Festival in the Future (page 107)

Key Takeaways

- ❖ Tracking and understanding your visitors through visitor surveys provides important information for future planning and marketing.
- ❖ Measuring, recording and reporting economic impacts can be vital to maintaining support, particularly from public agencies.
- ❖ Don't forget to follow up with sponsors and partners. You want to build on the relationship you established this year.
- ❖ Build on your successes carefully. Move ahead with opportunities but don't go too fast or take on too much all at once.

There are a few things we recommend you attend to so as to ensure that next time the event goes more easily and successfully. They will also provide the information you need to report to sponsors and partners, and to approach new ones next year. And, they will help you build a strategy for the future of your festival.

This requires attention to the following:

1. Measuring your attendance and economic impacts.
2. Assessing what worked and what didn't, and how successful the event was in its different aspects.
3. Maintaining and building on your partnerships and sponsor support.

4. Keeping your volunteers enthusiastic about continuing their involvement.
5. Growing the festival in future, in the right ways.

13.1 EVALUATING ATTENDANCE AND ECONOMIC IMPACTS

There are several things to be done to evaluate the outcomes of the festival; some are done during the event, others afterward.

TRACKING THE NUMBER OF VISITORS AND OTHER DATA

This may be obvious, but it's important to keep track of how many visitors you get. If you have a gated-event, this is straightforward but it can be more complex if you have no admission fees. Here's a couple of ways you might approach this:

- Use people counters – either electronic or volunteers who count people in various locations.
- Give out bracelets or tickets to people as they enter – even though it's a free event, you will likely still need to know how many people are entering for fire occupancy limits and this will also give you attendance data.

Also record and summarize information about the other numbers associated with the festival - revenues, operating costs, sponsorships, partner contributions and so on. This will be vital to maintaining and building support in the future.

SURVEYING VISITORS

Survey your visitors either on-line after the event using tools such as Survey Monkey (<https://www.surveymonkey.com/>) or while they are on-site (there are tools that can help here too; check out Quick Tap Surveys (<http://www.quicktapsurvey.com/>)). You want to find out the following types of things:

- Where they live
- Whether they travelled specifically for your festival or event
- Basic party characteristics and demographics
- How they heard about your festival/event
- What motivated them to visit
- How satisfied they were with the overall festival and its various elements
- Whether they plan to return
- How much they spent while in the area
- And, get their email address and permission to send them information on your next festival

Some of this information is needed to do the economic impact analysis (see discussion below). Some will help you assess your marketing activities, and some will help you fine tune your event for future years. Some suggested questions are provided in Appendix 3. If you have the resources, consider contracting this to a professional, at least for the first couple of years.

MEASURING ECONOMIC IMPACTS

Measuring, recording and reporting the economic benefits of the festival is not only important, it is likely to be vital to maintaining support, particularly from public agencies who want to see what the economic returns on their investment have been. Don't let your event slide into the 'discretionary spending' category. Rather it needs to become 'vital' in various ways to the community and therefore untouchable by politicians.

One of the best ways to accomplish this is to report on the economic impacts of the event.

The Canadian Sport Tourism Alliance (CSTA; <http://canadiansporttourism.com/>) has a tool that can be used to measure economic impacts called STEAM (Sport Tourism Economic Assessment Model). It is designed for sports events but can work for major festivals as well. You need to be a member of CSTA to use the model or contract them to do so for you, but membership costs are very reasonable (membership will give you access to many other valuable resources, particularly for major events). If you operate a major festival or event, Events Nova Scotia can assist you in using STEAM.

To use STEAM, you need to have various pieces of information about your visitors/spectators and participants including where they are from, how long they stayed and the role the event played in their travel. Appendix 4 is a spreadsheet that lists all the information you need. To get this information, you will need to survey your visitors/participants, either during or after the event.

If you are a smaller event or can't get the information needed for STEAM, we suggest you record and report the following (sources are in brackets):

- Attendance volumes (gate counts)
- Tourist attendance (from a visitor survey)
- Revenues from on-site spending of all visitors (admission and other on-site revenues)
- Other spending in the community by tourists (as reported on the visitor survey)
- Number of people employed by the festival and the wages and salaries paid to them
- Taxes paid by the festival

You might also want to report on other impacts of a beneficial nature to the community might such as:

- Pleasure, fun, entertainment, community pride, visits from friends and relatives and other benefits resident attendees gained
- Facilities added or improved in the community as a consequence of the festival

13.2 EVALUATING THE EVENT

Check back with the vision and goals that you established. Are you on track to achieve them? If not, perhaps you need to modify the event or some elements in subsequent years.

A management guru has advocated ‘management by walking around’; the idea being that the best assessment of what is working and what isn’t is by witnessing it yourself. This is a highly recommended procedure for your festival. In fact, it should be organized in a fashion whereby there are daily reports from festival management people who are mandated to make a site tours on a scheduled basis.

13.3 KEEPING YOUR FRIENDS

The partners and sponsors you sold on working with you the first time need to be encouraged to maintain their support in the future. This can be accomplished with the following kinds of initiatives:

- Follow up with sponsors and partners. This is vital to make sure the festival is meeting their goals and explore how to better meet them next year.
- Sponsors will want to see evidence of their ROI (Return on Investment). A document outlining media coverage, where their logo or name was used, attendance and marketing reach should be sent out to all sponsors at the end of the event.
- Whatever else you do, make sure you make your appreciation of the relationship clear, either through one-on-one appreciation initiatives, or through organizing a collective appreciation event following the festival. This could take the form of a dinner, a group outing or some other such event.

Helpful Tip: Keeping Friends

A follow-up wrap meeting even before all the statistics are collected can be a good idea. This engages your sponsors and partners in a healthy feedback process. Later on, in a report, they will be happy to see their words or concerns immediately taken into account for planning of the next edition.

Try to anticipate and pre-empt them if problems occurred, and offer positive solutions right from the start.

In general, keep in mind that a ‘partnership’ is more than a contract. Strong partnerships take into consideration the future and are designed to achieve a lasting relationship of mutual benefit. This is especially true with community partnerships. You have to live with community organizations for the long term, for better or worse, so try for ‘the better’!

It’s also vital that you meet with your other partners, municipal support departments and other community stakeholders to give and receive debriefs. And, don’t forget to debrief with the board of directors and committees.

13.4 COUNTERING VOLUNTEER BURNOUT

Volunteers play a major and vital role in festivals, and particularly so with community festivals that commonly have few, if any, staff. A challenge with volunteer-driven events is volunteer burn-out. This is a situation wherein those with the experience and skills find it difficult to find others to step in and allow them to reduce their own involvement over time. This leads to a few people being expected to do too much, with the longer

term impact being burnout. Unchecked, this can lead to an unravelling of the festival organization and the quality of the event going downhill.

Countering this natural tendency requires a serious commitment to attracting and developing new people. As discussed in Chapter 7, this can be greatly aided if there is a significant volunteer recognition program in place; one that celebrates their contribution and showcases them as valuable community members.

13.5 BUILDING ON SUCCESS – GROWING AND IMPROVING THE FESTIVAL IN THE FUTURE

Being successful is wonderful. But being too successful too fast can be dangerous. Take care to build on success in a controlled fashion, with each new step being carefully considered, planned and implemented. It is important that only a few innovations be added each year so they can be implemented without undermining other activities.

How do you balance the ‘change, but not too fast’ issue? It’s simple in concept, but less simple in reality. Move ahead with opportunities, but don’t go too fast or take on too much all at once. Organizing an event is a major balancing act.

At the same time, try to be open to positive change. Change can renew and refresh your festival and your organization as well. This strengthens the appeal of the event among past visitors. It counters the ‘been there, done that’ attitude – the customer burnout factor which is often at play.

Keeping your festival fresh and exciting is a key success factor. But don’t forget your roots or who and what you are. It’s important to ‘keep your eye on the ball’ in terms of the original objectives of the festival. Be careful not to stray too far from those objectives as you could lose your reason for being, and your supporters as well. That isn’t to say that you should never revisit your objectives and revise them based on new realities or new opportunities.

Doing a full debrief with all your stakeholders is imperative should you decide to repeat the event. Set up several meetings:

- The executive/lead organizers
- On-site team (including security, technical/AV)
- Lead volunteers
- Board of directors

Send out emails for input to vendors, sponsors and attendees. As mentioned before, call your sponsors to find out how they felt things went and to gauge their interest in returning.

Don’t forget to fill out any wrap reports for government funding. Many hold a portion of funds back until after the event and wrap report are received.

Once all of this is done, have you team analyse the data, talk about what worked and what didn't. If in the end everyone agrees it's an event worth doing again, get back on the horse and start from the beginning.

APPENDIX 1: DETAILED OPERATING BUDGET WORKSHEET

Appendix 1: Detailed Operating Budget for Festivals and Events			
	PROJECTED	ACTUAL	VARIANCE
REVENUE			
Government Funding			
Municipal			
Provincial			
Civic/Community			
Federal			
Sponsors			
Private Sector Sponsors			
General Revenues Earned			
Vendors on-site fees			
Corporate Samplers			
Ticket Sales			
Beer Tent Revenues			
Merchandise			
Food and Beverage			
other			
Donations of Goods & Services (In-Kind)	**Must show in-kind in revenue and expenses		
Accommodations			
Transport			
Print Media			
Radio			
Print Materials			
Venues			
TOTAL REVENUE			

Appendix 1: Detailed Operating Budget for Festivals and Events cont'd			
	PROJECTED	ACTUAL	VARIANCE
EXPENSES			
Artists and Performers			
Talent Scouting			
Performance Fees			
Travel Fees - Flights			
Accommodations			
Per Diems/Meals			
Ground Transportation - Retails			
Ground Transportation - fuel and parking			
Deduction for NR Tax (if non Canadian)			
Talent Riders			
Meals			
Administration			
Salaries/Benefits			
Event Manager			
Vendor Co-ordinator			
Volunteer Co-ordinator			
Marketing/Social Media Co-ordinator			
Public Relations Person			
Graphic Design/ Website Person			
Contract, temporary labour			
Accounting & Bookkeeping			
CRA employee deductions			
Staff Per Diems			
Office General			
Office Rental and Expenses			
Business Taxes			
Business Licenses			
HST			
Permits (fire, fireworks parade, street closure etc.)			
Interest and Bank Charges			
Insurance			
NS Registry of Joint Stocks			

Appendix 1: Detailed Operating Budget for Festivals and Events cont'd			
	PROJECTED	ACTUAL	VARIANCE
Advertising and Marketing			
Radio Advertising			
Print Advertising			
Social Media ad buys (Google Ads, Facebook)			
Website Design			
Posters			
Souvenir Programs			
Poster Distribution			
Promotions and Gifts			
Street Banner			
Street banners Signage			
Banners and sponsor signage			
Presentation Expenses			
Venue			
Venue Rental			
Venue CIF			
Ushers			
Parking Attendants			
Policing			
Private Security			
Office Supplies			
Waste Management			
Storage			
Tent Rentals			
Portable Toilets			
Signage-parking, directions, information			
Information Booths			
Ticketing Hard costs			
Admission Bracelets			
Ticket Printing			
Ticket Vendor Surcharge			
Door Staff			

Appendix 1: Detailed Operating Budget for Festivals and Events cont'd			
	PROJECTED	ACTUAL	VARIANCE
Sound & Lighting/Tech requirements			
Generator rental			
Barricades			
Bleacher Rental and Install			
Walkie Talkies			
Cell Phones			
Accreditation/Lanyards			
Craft Catering for Volunteers			
Craft Catering for Artists			
Repairs to the Grounds			
Volunteer / Staff T-shirts			
Misc. On Site Supplies			
Decorations			
Souvenirs/Merchandise for Sale			
First Aid			
Beer Tent			
Refrigeration			
Power			
debit/credit card machines			
Drink Tickets			
Door & Bar Staff			
Barricades and Fencing			
Security			
Tents			
Entertainment			
Inventory			
Permits			
Additional Insurance			
Waste Management			
Bottle Exchange and Hauling			
Ice, Cups, Napkins, cleaning supplies			
Admission Bracelets	**Must show in-kind in revenue and expenses		
Portable Toilets			
Signage			
Donations of Goods & Services (In-Kind)			
Accommodations			
Transport			
Print Media			
Radio			
Print Materials			
Venues			
TOTAL EXPENSES			
SURPLUS/DEFICIT			

APPENDIX 2: SAMPLE OPTIONS FOR SPONSOR RECOGNITION

Appendix 2					
Sample Options for Sponsor Recognition					
COMMITMENT	Level 1	Level 2	Level 3	Level 4	Title Sponsor
	\$\$\$	\$\$\$	\$\$\$	\$\$\$	\$\$\$
Available Positions	15	10	1	6	1
Industry Exclusivity	n/a	Y	Y	Y	Y
MEDIA					
Title Sponsor of Event					Y
Recognition in Radio ads			Y	Y	Y
Logo on all print collateral			Y	Y	Y
Social Media					
Website Links			Y	Y	Y
Social Media Exposure		Y	Y	Y	Y
PROMOTIONAL MATERIAL					
On-Site Signage	Y		Y	Y	Y
Event Program					
Full Page Ad					Y
Half Page Ad			Y	Y	
Third Page Ad	Y	Y			
cover logo			Y	Y	Y
map		Y	Y	Y	Y
Schedule	Y			Y	
Performer Information	Y				
Sponsor mention page	Y	Y	Y	Y	Y
COMMITMENT	Level 1	Level 2	Level 3	Level 4	Title Sponsor
STAGE / WORKSHOP SPONSORSHIP					
Stage 1				\$\$\$	
Ind: Trussing,lights, sound and Bleachers					
Stage 2				\$\$\$\$	
Ind: Trussing, Lights and Sound					
Workshop				\$\$\$	
ON-SITE ACTIVATION					
On Stage speaking opportunity	Y			Y	Y
Mention from stage (rotating)	Y			Y	Y
Kiosk Location (10x10)		Y			Y
Information booths			Y		
Volunteer T-Shirts					Y
Map - Custom					Y
Roaming / Sampling Opportunities			Y	Y	Y
ADDITIONAL OPPORTUNITIES AVAILABLE					
Program Advertisement (10% off)					
Water Sponsorship					
Performer and Staff T-shirts with Logo					

APPENDIX 3: SAMPLE VISITOR SURVEY QUESTIONS

Sample visitor survey questions for a festival/event are provided on the following pages. Depending on the resources you have available and your specific objectives in undertaking the survey, you can select the questions you want to use. You will likely want to customize some questions to reflect the nature of your festival/event, your marketing activities, etc. and/or add some other questions to address specific issues you want to research.

It's important to make sure that your visitor survey is administered to randomly selected visitors and also to have a minimum number of completed surveys for the results to be valid. Target at least 200 completed questionnaires, more if you want to look at the results by sub-groups of respondents, e.g. Nova Scotia residents vs visitors from outside the province.

If you are planning to use the STEAM economic impact model, review the information needs identified in Appendix 4 and add questions that will give you this additional information.

SAMPLE VISITOR SURVEY QUESTIONS FOR A FESTIVAL AND EVENT

A. Information on Visitors to the Festival or Event

A1. Where do you live?

- a) Nova Scotia – within 40 km of the festival
- b) Nova Scotia – more than 40km from the festival
- c) Elsewhere in Atlantic Canada
- d) Quebec
- e) Ontario
- f) Other Canada
- g) New England, US
- h) Other United States
- i) Overseas

A2. In which age category do you fall?

- a) 18-24
- b) 25-34
- c) 35-44
- d) 45-54
- e) 55-64
- f) 65-74
- g) over 75

A3. How many people are visiting the festival with you today? Include yourself and those you are sharing expenses with.

A4. Which of the following best describes your travel party?

- a) Travelling alone
- b) Travelling as a couple
- c) Travelling as two or more couples
- d) Travelling as a group of friends
- e) Travelling as a family with children
- f) Travelling as part of a larger group
- g) Other

A5. Please indicate which of the following best describes the highest level of education attained within your household.

- a) High school incomplete
- b) High school complete
- c) Some Technical School/College
- d) Technical School/College Complete
- e) Some University
- f) University Complete
- g) N/A or Refused

B: Information on the Visit to the Festival/Event

B1. How did you hear about this festival/event?

- a) Word of Mouth
- b) Tourism Nova Scotia website
- c) Festival Website
- d) Other Website
- e) Facebook
- f) Twitter
- g) Advertising
- h) Visitor Information Centre
- i) Festival Poster/Brochure
- j) Just Driving By/In the Community
- k) Sponsor Advertising
- l) Other, please list _____

B2. Have you attended this festival/event prior to this year?

- a) Yes
- b) No

If yes, how many years have you attended the festival? _____

B3. How long did you spend at the festival/event?

- a) 1 hour or less
- b) 1 – 2 hours
- c) ½ day
- d) A full day
- e) More than one day. If so, how many days did you spend at the festival/event? _____

B4. How much money did the people you are visiting the festival (those you are sharing expenses with) spend at the festival today?

- | | |
|-------------------------------------|----------|
| a) On Admissions/Tickets/Activities | \$ _____ |
| b) On Food & Beverage | \$ _____ |
| c) On Merchandise/Retail | \$ _____ |
| d) Other | \$ _____ |
| e) Total | \$ _____ |

B5. Overall, would you say that the festival/event has met your expectations, exceeded your expectations or not met your expectations?

- a) Met Expectations
- b) Exceeded Expectations
- c) Not met Expectations

B6. Overall, how would you rate the festival/event on each of the following factors? (You can use a scale of 1 – 5 or Excellent, Good, Fair, Poor; make sure to give a No Opinion option)

- a) Quality of activities
- b) Quality of entertainment
- c) Quality of food service
- d) Quality of Merchandise

- e) Overall quality
- Add others as appropriate

NOTE: You may want to add questions to get a rating on specific elements or parts of your festival.

B7. How likely would you be to attend the festival/event again next year?

- a) Very Likely
- b) Somewhat Likely
- c) Not Very Likely
- d) Not At All Likely

B8. How likely are you to recommend this festival/event to friends or relatives?

- a) Very Likely
- b) Somewhat Likely
- c) Not Very Likely
- d) Not At All Likely

In your opinion, what, if anything, could the organizers do to improve this festival/event?

C: Role of the Festival/Event in the Trip

C1. How long are you staying in this community/area of the province on this trip?

- a) ½ day
- b) 1 day (not overnight)
- c) Overnight Number of Nights _____

C2. Can you estimate how much your party will spend, in total, on your visit to this community/area of the province?

- | | |
|---|----------|
| a) On accommodations/campgrounds | \$ _____ |
| b) On restaurant meals | \$ _____ |
| c) On groceries and liquor | \$ _____ |
| d) On automobile related expenses (gas, etc.) | \$ _____ |
| e) On retail purchases (gifts, souvenirs, etc.) | \$ _____ |
| f) On recreation | \$ _____ |
| g) On other items | \$ _____ |
| Total | \$ _____ |

NOTE: If you are trying to estimate the economic impact of the festival on your community, it's important that you know how important the festival was in attracting the visitor to the area. Question C3 will help you get at this information. You should only count the spending for visitors for whom the festival was an important reason in their decision to visit the area.

C3. A) On a scale of 0 – 10, please indicate the role the festival/event played in your decision to visit this community or area of Nova Scotia on this trip? A 0 rating means that the festival/event was not a factor at all in your decision to visit whereas a 10 means that the festival/event was the main (and only) reason for your trip to the community/area.

1	2	3	4	5	6	7	8	9	10
Not a Reason									Main/Only Reason

D. OTHER QUESTIONS

D1. Would you be interested in receiving information about next year's festival?

Yes No

If yes, can you provide your email address so we can forward you this information when it becomes available?

APPENDIX 4: USING THE STEAM MODEL

Events Nova Scotia staff can assist some festivals and events to measure their economic impacts by using the STEAM model. If your festival is eligible for this type of assistance, you will receive an email like this, and asked to complete the worksheet on the following pages.

“Thank you for inquiring about the Sport Tourism Economic Assessment Model (STEAM). Let me begin by telling you a little about the history of STEAM:

As part of the preparation of hosting an event, it is often desirable to conduct an economic impact assessment in order to estimate the level of economic activity that could potentially be supported by the event.

There are two main challenges associated with performing an impact analysis.

First, depending on the assumptions made during the preparation of these studies, the estimated impact can vary widely.

Second, the costs associated with conducting an impact review can be prohibitive for small to medium sized hosting organizations.

The Canadian Sport Tourism Alliance (CSTA) has recognized the challenges associated with generating credible and cost-effective economic impact studies. Therefore, in 2002, and in association with Sport Canada, the Canadian Tourism Commission, the Conference Board of Canada’s Canadian Tourism Research Institute (CTRI), and the Canadian Association of Convention & Visitors Bureau, the CSTA has developed the Sport Tourism Economic Assessment Model (STEAM).

There are two key components of the model that act to standardize the results, thereby allowing for comparability of the economic impacts of different events in different locations across Canada. The first is the use of standardized visitor expenditure profiles that have been developed with primary data collected by the CSTA, which is then supplemented with data from Statistics Canada. The second is the use of a modified version of CTRI’s TEAM model, which creates the economic impact estimates from the expenditure inputs.

As noted, the average daily expenditures of visitors at sporting events have been prepared using the results of on-site economic impact assessments conducted by the CSTA. On-site surveys have been conducted at more than 50 sports events across Canada including summer and winter sports as well as spectator and participant based events. This extensive data set has allowed for the development of key indicators to differentiate the spending of visitors, including the person’s role at an event (i.e. spectator, participant, and media), the distance they travelled, their age, and their length of stay.

Accordingly, the model makes adjustments to the expenditure profile used in the preparation of the impact assessment based on these demographic characteristics, as well as the location of the event. This spending estimate is then combined with capital and operations expenditures contained in an event’s business plan to produce an overall estimate of the expenditures associated with the event

under consideration, which is then entered into the economic impact assessment component of the model.

The multipliers used within the STEAM model have been developed by CTRI and are based on their TEAM model, the pre-eminent economic impact assessment model in Canada. STEAM (and TEAM) is based on Statistics Canada's provincial input / output tables, which are then combined with other data to incorporate the local and provincial employment and tax structures of the host community. Both the expenditure profiles and the multipliers are updated frequently as more survey results become available or due to major changes in tax structures (i.e. introduction of HST).

It is important to note that there are two types of STEAM Reports that can be produced: STEAM Predictor – which is done prior to the event and is based on best estimates of the event. This report is free to you. STEAM PRO is a comprehensive report completed after the event using data collected on-site during your event as well as the final budget for the event. To gather the data for a report such as this is time consuming and expensive. As a result we generally only produce 2-3 of these each year.

Access to the STEAM tool is restricted to members of the CSTA of which Events Nova Scotia is one.

*In order to produce a STEAM predictor report we require you to fill out the attached worksheets concerning attendance by participants, spectators and VIP/Media. **Please keep in mind that we are only asking about UNIQUE spectators, participants and VIP/Media – meaning if the event is 3 days and someone buys a 3-day pass they can only be counted once!** Additionally we require a copy of your complete budget, including any capital expenses and a contact name and number should we have any questions or need to clarify any information submitted.*

Please be assured that we do not share your information – inputs, budget or completed STEAM Report- with anyone but you!"

Official Name of Event: _____

Dates of Event (Include Year): _____

Host City/ Community: _____

Return via fax: 902-798-6600

or email: Angea.Dennison@NovaScotia.ca

ATTN: ANGELA DENNISON

Nova Scotia STEAM - Participant Input

NOTES:

Number of unique out of town participants	0
---	---

Percentage of participants staying overnight (0-100)	100
--	-----

Overnight participants (0-100)

% of overnight participants from Canada	0
---	---

% of overnight participants from U.S.	0
---------------------------------------	---

% of overnight participants from Overseas	0
---	---

<i>Total (must sum to 100)</i>	100
--------------------------------	-----

Overnight Domestic Distance (0-100)

% of Canadian participants travelling from out of town up to 320km, regardless of province of origin	0
--	---

% of Canadian participants travelling from more than 320km and the same province as the event	0
---	---

% of Canadian participants travelling from more than 320km and a different province as the event	0
--	---

<i>Total (must sum to 100)</i>	100
--------------------------------	-----

Average overnight length of stay	0.0
----------------------------------	-----

Age of Participants (0-100)

% of participants under 19	0
----------------------------	---

% of participants 19-44	0
-------------------------	---

% of participants 45 and over	0
-------------------------------	---

<i>Total (must sum to 100)</i>	100
--------------------------------	-----

% of participants under 19 who are staying in commercial accommodation	100
--	-----

Same Day participant

Average number of day trips taken by each participant	0.0
---	-----

Nova Scotia STEAM - Spectator Input

NOTES:

Number of unique out of town spectators	0
---	---

% of spectators staying overnight (0-100)	0
---	---

Overnight Spectators (0-100)

% of overnight spectators from Canada	0
---------------------------------------	---

% of overnight spectators from U.S.	0
-------------------------------------	---

% of overnight spectators from Overseas	0
---	---

<i>Total (must sum to 100)</i>	100
--------------------------------	-----

Overnight Domestic Distance (0-100)

% of Canadian Spectators travelling from out of town up to 320km, regardless of province of origin	0
% of Canadian Spectators travelling from more than 320km and the same province as the event	0
% of Canadian Spectators travelling from more than 320km and a different province as the event	0
<i>Total (must sum to 100)</i>	<i>100</i>

Average overnight length of stay	0.0
----------------------------------	-----

Importance of event for spectators (on a scale of 0-100)

Overnight Domestic	100
Overnight USA	100
Overnight Int.	100

Same Day Spectator

Average number of day trips taken by each spectator	0.0
---	-----

Nova Scotia STEAM - Media/VIP Input

NOTES:

Number of unique out of town media / VIPs	0
---	---

Percentage of media / VIPs staying overnight (0-100)	0
--	---

Overnight media / VIPs (0-100)

% of overnight media / VIPs from Canada	0
% of overnight media / VIPs from U.S.	0
% of overnight media / VIPs from Overseas	0
<i>Total (must sum to 100)</i>	<i>100</i>

Overnight Domestic Distance (0-100)

% of Canadian media / VIPs travelling from out of town up to 320km, regardless of province of origin	0
% of Canadian media / VIPs travelling from more than 320km and the same province as the event	0
% of Canadian media / VIPs travelling from more than 320km and a different province as the event	0
<i>Total (must sum to 100)</i>	<i>100</i>

Average overnight length of stay	0.0
----------------------------------	-----

Same Day media / VIP

Average number of day trips taken by each media / VIP	0.0
---	-----