EVENTS NOVA SCOTIA

Inspiring times

FESTIVAL & EVENT PLANNING GUIDE





INTRODUCTION:
HOW TO USE THIS GUIDE

We hope this guide will help you plan, identify, and address the necessary details that go into hosting a successful event in Nova Scotia.

This guide covers the matters you will need to consider from the initial idea through to 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 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 11)
- post-event evaluation and planning for the future (Chapter 12)

Throughout the guide, you will find helpful tips and examples of how other Nova Scotia festivals and events have operated, along with web links to other resources.

The guide has been prepared on behalf of Events Nova Scotia, a division of Communities, Culture and Heritage, and updated in 2020.

DISCLAIMER:

The content of this guide does not constitute legal or other professional advice or an opinion of any kind. The user is advised to seek specific legal advice or other professional advice. While the information contained in this guide is believed to be accurate as of early 2020, it is not so warranted.
The reader should note that federal, provincial, and municipal laws and regulations change frequently and it is recommended that you check with the appropriate authorities, including representatives of Communities, Culture and Heritage; Tourism Nova Scotia; Access Nova Scotia; and your local municipal government to obtain up-to-date information on laws that may affect your festival.

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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CHAPTER 1: FESTIVALS AND EVENTS TODAY

This introductory chapter is all about the basics of festivals and events and setting yourself up for success.

What Are Festivals and Events?

Festivals are celebrations involving multiple activities that happen over several consecutive days. They are usually held annually and in the same general location each year. Festivals are centred 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 not all events are 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 (Titanic 100, for example)
- events that happen on one day only, or regularly but not consecutively, such as weekly ceilidhs, concerts, or theatre performances

Throughout this document, the words "festival" and "event" are used interchangeably.

The Nova Scotia Event Strategy

The Nova Scotia Event Strategy's goal is to attract and develop authentic Nova Scotian major events, harnessing our natural assets and unique culture to create social and economic benefits for all Nova Scotians while leaving a legacy of growth for culture and sport. For more information, review the full strategy (http://eventsnovascotia.com/wp-content/uploads/2018/12/Events-Strategy-English.pdf).

Festivals and events can have significant economic impacts, both directly and through spinoff benefits to the area. Major events can generate substantial 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 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 to 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 appeal as a place to visit, live, or establish a business (this indirectly supports the community's economic development efforts)
- Be a celebration and fun for the community and visitors



Trends In Festivals and Events

Technological changes, together with changing demographics, lifestyle, and interests, are driving trends in festivals and events. The following are some noteworthy trends:

- 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.
- More niche festivals and events exist that celebrate special interests and hobbies, since it is easy to reach communities of interest through the Internet.
- Online ticketing is common, even for smaller events. Online ticketing can also provide information about your audiences and the effectiveness of your marketing.
- Many visitors and festival organizers now use mobile devices and apps to verify tickets at the gate, read credit cards, and provide information about the event.
- 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.
- Interest is strong and growing in anything to do with food, wine, and craft beer.
- "Local" is very important.
- Hybrid festivals — those that broaden the appeal of an event by adding complementary activities — are increasing in number. This helps to grow audiences, gives them more ways to spend money, and also helps to grow the sponsor pool.
- Competition for funding, partners, sponsors, and consumer dollars is increasing.

10 Things You Need to Know About Hosting a Festival or Event

1. Festivals and events can help bring new visitors the province, creating economic impacts. But they require 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 how they could align with your festival.

3. Your management team will need vision, leadership, passion, team building, communications/marketing skills, and expertise in several areas. You will need people that are detail-oriented because events are all about the details. Some are run totally by volunteers; others have 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. Sponsors want to know what your festival or event can offer that is valuable to them. Sponsors are not giving you a gift; they are a partner and for ways to reach their objectives through your event. Treat your sponsors well and be sure to follow up with them.

7. You will need to have contingency plans in place, including detailed procedures to help you and your event team handle emergencies and communicate with your team when these happen.

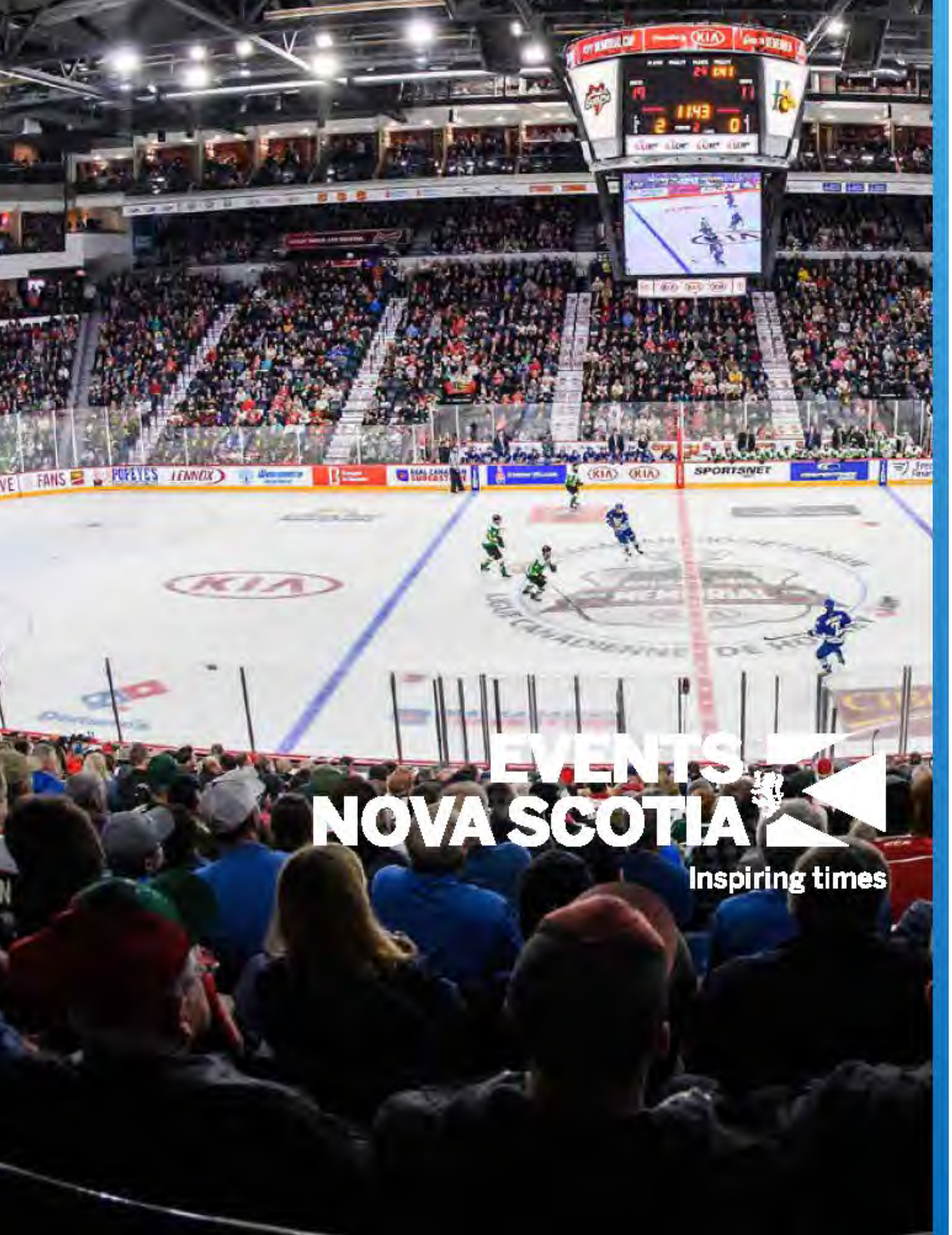
8. Your event will need to follow regulations at the municipal, provincial, and federal levels. Some regulations require inspections or licenses. Identify these early in your planning and work with the appropriate agencies as necessary.

9. Online and social media marketing will likely be the most effective promotional tactics for your festival. As with any marketing strategy, it requires careful planning, along with human and financial resources, to get right.

10. Keeping your festival fresh and exciting is a success factor. Expand in a controlled fashion by carefully considering, planning, and implementing each new step.

Key Takeaways

- Festivals are celebrations that involve multiple activities that happen over one or more days.
- The Nova Scotia Event Strategy's goal is to attract and develop authentic Nova Scotian events, creating social and economic benefits for all Nova Scotians.
- Trends in festivals and events include incorporating technology, a demand for more personalized experiences, and a focus on local products.
- A strong concept and budget, getting community or governmental support, and adequate funding are key requirements for success.



CHAPTER 2: THE FESTIVAL IDEA – WILL IT WORK?

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

The Concept

Developing an event 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 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.

Questions to Ask:

Why?

What are your objectives? What will this do for you or your community? Will people experience something different, compelling, and not to be missed?

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 a minimum of 10 to 12 months for planning, depending on the size/scope of the event.

How?

Who is going to help you make this happen? Will others in the community benefit from your festival? E.g. accommodations, restaurants, sports bodies, cultural organizations, etc. Are there sponsors out there that could help? What about other sources of funding?

Here are the key ingredients to major event hosting.

Having these partners work with you is essential.



We suggest you deal with the Why and the Who before the What.

Why? Your Vision and Objective(s)

Write down "What is the Vision?" Be clear, be brief, and be inspired. Your vision will help motivate others and set the standard you want to reach.

See this example from Celtic Colours, an annual event in Cape Breton, NS (http://celtic-colours.com):

> *"To promote, celebrate and develop Cape Breton's living Celtic culture and hospitality by producing an international festival during the fall colours that builds relationships across Cape Breton Island and beyond."*

Once you have your vision, decide on your objectives. Objectives should be SMART:

- Specific
- Measurable
- Achievable
- Realistic
- Time specific

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
- leave a legacy to the community
- make money
- attract tourists
- educate others about a particular art form or cultural heritage
- commemorate an important aspect of the community that is a source of pride
- 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 concept on paper, be open to allowing it to change somewhat. It will morph, it will solidify, and it will start to appear as a real festival.

From Vision to Reality

"The Nova Scotia Lobster Crawl was a natural for us. Nova Scotia is known for its lobster. Guests travel from around the world to eat our lobster, but only as a summer experience. However, [lobster season] is a winter fishery. Our South Shore Tourism Co-operative had been looking for opportunities to grow demand for local businesses on a year-round basis. Our goal was to strengthen operational sustainability and our contribution to the economies of our communities. While we were known as a summer destination, we needed something new and innovative that would enable us to capture the atte ntion of the public, our target markets, and media. Capitalizing on this tremendous market awareness of Nova Scotian lobster and working with businesses and organizations that were open and wanting more business, we set about creating a lobster festival to take place in February."

Donna Hatt, Executive Director
Lobster Crawl Festival, South Shore, Nova Scotia

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 it 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 you have. This may influence which ones you choose to target.

Identifying your target markets and reaching out to them has never been easier thanks to social media (though it still takes time, skills, and money). Refer to Chapter 11 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 compelling — something 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.

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: 1) music is the primary focus, 2) vendors, concessions, and experiencing the food is the secondary focus, and 3) workshops, the third.

Check out the competition both nearby and beyond. Search out festivals in other communities, across the province, even across the country. Is your idea being done in Alberta, Ontario, and New Brunswick, but not in Nova Scotia? Check out their programs, see what's working, and incorporate those ideas into your concept.

Know Your Local Audience

"Before starting the planning process, it's important that you look within your community for strengths, shared challenges and begin a journey together to explore opportunities. Take inventory of what you already have, adopt a 'glass is nearly full' attitude and surround yourself with like-minded leaders and businesses that stand to gain from the efforts."

Donna Hatt, Executive Director
Lobster Crawl Festival, South Shore, Nova Scotia

Helpful Tip:
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, realistic, and attainable. Your vision will become the foundation for your festival strategy and the map of how to get where you want to go.

Think like a professional marketer with respect to how your festival is going to be represented in the marketplace. It should have a strong unique selling proposition (USP) 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 logo, which may be accompanied by a tag line.

Don't make your event scope too 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.

Determine the scale of your event. 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 have 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.

Programming 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, many are now seeking healthy experiences, nature experiences, and food-and-wine experiences. All of this is considered fun to the participants, yet there are often opportunities to have a legacy of learning and opening people up 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 to keep things simple, especially in the first years. Add to your event by layers each year you are in the business.

Sometimes you can attach your festival to another festival or event—one that is 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:

- Online events calendars such as http://www.novascotia.com/events
- Events Nova Scotia – http://eventsnovascotia.com
- 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 for the same days, work with them to coordinate your programming schedules.

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



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, you will have to take extra logistics into consideration. You have to book these areas well in advance and be sure to consider any power requirements. Using generators can be noisy as well as costly.

Arenas are another option. Again, keep in mind they also have a high and low booking seasons and you will need to consider extra costs for covering ice or basketball courts.

Depending on the scope of your event and its proximity to other communities, you may be able to share resources or combine efforts with those communities. Sporting events will often partner with surrounding communities so they have more fields or ice surfaces to work with.

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.

Spreading Your Wings — A Festival as a Tourism Generator

Festivals and events can be successful tourism generators, if you focus on the following:

- 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 add it to their itinerary
- 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 opportunities might be available.

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 points 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 the festival/event is self-sufficient, and based on a reasonable and realistic set of assumptions with respect to visitation and revenue sources.

Preparing a Business Plan

You will need to summarize all of the foregoing in a business plan. This is important even for a small festival. The plan can be a very simple, point form document that covers the

- 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 (SWOT) analysis: Strengths, Weaknesses, Opportunities, Threats
- festival program
- budget – costs and revenues
- partners and sponsor opportunities
- event evaluation plans
- long-term strategy

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.*
- *Do your research – look at what others have achieved. Calculate potential revenues and costs and decide if it's feasible to proceed.*
- *Write a business plan – and a detailed critical path schedule for what has to be done when.*



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.

The Start-Up Committee

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

The initial organizing group may be an ad hoc group that gets 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.

Selecting a Site

Many variables 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, consider the following:

- 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 bad weather
- Local sensitivities or issues
- Timing — is the site available for a sufficient time for setup and teardown?

Helpful Tip:
Assessing Venues

Other considerations when looking at venue options:

- *Does the venue have the right physical capabilities – wash rooms, 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, to find out about restrictions that might impact your ability to use venues or their capacity.*

The site must have a positive impact on the community to ensure a healthy future for your event. The festival concept may be wonderful, and you and your board of directors may 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 restricted or blocked access to parks, 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. Festival organizers must respect noise by-laws and other regulations and make sure residents can access their homes, businesses, and parking.

You may, on the other hand, find it's better to have the festival or event outside of town.

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 if that is the case.
- Is there parking available on-site for all visitors? You will need a plan if the site fills up.
- Can you post signage on the highways leading to the site?
- Can you install directional signage 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?
- If parking on-site is for staff and volunteers, concession operators, handicapped visitors, and entertainers only, you will need lots of signs leading up to the site that direct general visitors to off-site parking. Make sure the accreditation for the vehicles allowed on-site is easy to read for trouble-free parking.
- Is there room for a drop-off and pickup area? This needs to be strictly supervised so it doesn't become a parking lot.
- If you are operating a shuttle service to a parking area, make sure the way in and out, and the pickup/drop-off area, 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 there is adequate room for them to turn around or keep moving forward if they choose to park elsewhere.

Work closely with the local parking enforcement authority to determine parking options. Ensure any additional traffic restrictions on surrounding streets are well marked.

Shuttle Service

Shuttles can ease up 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, ensure you have plenty 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

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 the rain stops? 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 you need to change programming or a 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 a portable washroom service? Are there sufficient hand-washing stations?

Don't forget you will 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. Whichever you choose, ensure you have access to power and Wi-Fi. Depending on the security of your office, other equipment, such as a printer, may be useful. Always ensure you have 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.

Advertise your event on Volunteer Nova Scotia and gain access to thousands of potential volunteers *(http://volunteerns.ca).*

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 that 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 also need a secure location to store equipment, supplies, and tools.

Storage and Holding Area

Some equipment and supplies will 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 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. Most importantly, they will need to know who has the authority to remove items from the site.

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, and the space and services the festival will need.





CHAPTER 4: RULES & REGULATIONS

Several rules and regulations could be relevant to your festival. Check them out, talk to other festivals, your municipality, and the province.

Overview of Regulations and Licensing

Each municipality will have its own specific rules as to approvals and permitting, and you will need to comply with various provincial approvals as well. Many municipalities that host festivals 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 through your municipality as well as the province.

Some of the other approvals you might need include the following:

- A land-use agreement 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 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. You should, however, budget time for this.

Below is an overview of the permits and approvals you may need, as well as sources to check out any additional requirements. This information and the approvals you may require can change quickly, so make sure you do your own research as well.

Municipal Regulations and By-Laws

Municipal regulations and by-laws vary from municipality to municipality. It is likely that your municipality will have a number of regulations 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.

The municipality may require a special event permit. Find out the timelines involved. Some permits may require the paperwork be 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.

Provincial Regulations

There are many provincial regulations you must follow in order to comply with current laws and regulations, especially in regard to the sale of alcohol, food, entertainment and lotteries.

Service Nova Scotia – Alcohol, Gaming, Fuel and Tobacco Division

The Alcohol, Gaming, Fuel and Tobacco Division of Service Nova Scotia is the regulatory body charged with administering Part II of the Gaming Control Act, parts of the Liquor Control Act, and the Theatres and Amusements Act. In broad terms, the Division is responsible for licensing and regulating liquor, gaming, and amusement activities, and ensuring these activities are conducted with honesty and integrity and in the best interest of the general public.

Several regulations and licences may be relevant to your festival/event. These can be found through https://novascotia.ca/sns/access/alcohol-gaming.asp.

Place of Amusement Licence

You will need a Place of Amusement Licence (Outdoor Festival/Concert) to hold an outdoor festival or concert in Nova Scotia. Find the application at http://www.novascotia.ca/sns/paal/agd/paal225.asp.

If you intend to offer an itinerant performance in Nova Scotia, that is one that travels from place to place on a circuit, such as a circus, you will also need a Place of Amusement Licence (Itinerant). Make sure you obtain the appropriate licence.

Liquor Licence: Special Occasion

If you are planning to provide liquor service, you will require a Special Occasion Liquor Licence. Find more information at http://novascotia.ca/sns/access/alcohol-gaming/liquor.asp.

Special Occasion Licences have certain terms and conditions which you will find on the application form (http://novascotia.ca/sns/pdf/agd-application-for-special-occasion-liquor-licence.pdf), including limitations on advertising. Outdoor event applicants must also 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 you are charging admission to your festival/event, you will require a Place of Amusement Licence. For-profit festivals may also have different requirements (and licence fees) than not-for-profit festivals.

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 Licence, Games of Chance Lottery Licence, and Ticket Lottery Licences. Review all the licence requirements at http://novascotia.ca/sns/access/alcohol-gaming/gaming/licences.asp to make sure you are aware of what you need for your event.

Amusement Devices Licence: Department of Labour and Advanced Education

The Amusement Devices Safety Act provides for the inspection and licensing 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. Find the details at http://novascotia.ca/lae/equipmentsafety/amusementdevices.asp and the Amusement Devices Licence application at http://www.novascotia.ca/sns/paal/lae/paal246.asp.

Food Establishment Permit: Department of Agriculture

If you want 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," you will require a Food Establishment Permit. A Temporary Event Permit is required for the sale of foods at temporary events, fairs, and festivals. This permit is required for a booth or other structure operated for 14 consecutive days or fewer per year and also includes food booths set up by community organizations to raise funds. Find details at http://novascotia.ca/agri/programs-and-services/licensing-and-permits/.

A municipal vendor's licence is also often required; check with your municipality to see if you need one. Some municipalities also require that all food handlers take the Food Safety Handling Course.

Office of the Fire Marshal

If you are planning to use tents, you will require the approval of the fire marshal who will set limits on the number of persons that can be accommodated in the tent (Chapter 8 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 already approved by the fire marshal, follow the capacity limitations and other requirements already in place. Always 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 to discharge fireworks as well.

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 following:

- The Occupational Health and Safety Act requires employers to adhere to operational and employee safety standards. Find information on the act, as well as a number of resources at 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.
- The Labour Standards Code governs employment rights with respect to minimum wage, vacation and holidays, employee/employer rights, etc. Find information at http://novascotia.ca/lae/employmentrights/.
- First aid regulations. Find a guide to first aid regulations and other health and safety publications 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. Find a variety of resources concerning volunteers at http://novascotia.ca/lae/volunteerism/.

Department of Transportation and Infrastructure Renewal: Highway Signage

If your festival/event involves any activity (e.g. road race or fun run, parade, bike-a-thon, 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). Find application forms at your regional TIR office and at https://novascotia.ca/tran/highways/roadsign.asp#Major. If the event is inside a town or the urban core of HRM, you can get the required permit from your local municipality.

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 RCMP's assistance in managing traffic, particularly if you are expecting large crowds.

Festival and Event Signage Tags

The Festival and Events Signage Tag Program allows for temporary signage for festivals and special events on the 100-series controlled-access highways upon approval. The criteria for participation in this program includes the following:

- Festivals and events should normally operate on an annual basis, but consideration will be given to a major one-time event
- Festivals and events must have fixed dates
- They must have potential to attract 5,000 or more visitors, with most being from outside the local area
- They must be promoted through Tourism Nova Scotia programs, such as www.novascotia.com
- They must provide visitor orientation as well as on-site visitor amenities, such as washrooms, first aid, etc.
- Festival and event organizers must develop and provide a copy of the festival/event's marketing plan, outlining marketing and promotional initiatives beyond the festival and event's tag signage
- Festivals and events must provide, with their application, a letter of support from the community whose 100-series highway community identity sign will have the festival/event tag sign affixed to it

TIR manages the manufacturing of the signs if and when they are approved. The festival/special event organizing association is responsible for installing, removing, and storing their signs. Signs should be installed up to three weeks prior to the event and removed within two weeks of the event ending. For more information, visit www.tourismns.ca/marketing/signage/attraction-signage.

Department of Lands and Forestry

If you are planning open fires or campfires as part of your festival, you may require a permit from the Department of Lands and Forestry (DLF). Contact your regional DLF office for information.

Department of the Environment

Check with the Department of Environment (http://novascotia.ca/nse/) to determine if your festival/event is responsible for meeting any of the regulations governing the testing and monitoring of drinking water.

Nova Scotia Registry of Joint Stocks

Nova Scotia's Registry of Joint Stocks provides society incorporation and registration as well as business registration.

Incorporating a Non-Profit Society

A society is a non-profit organization that has been incorporated under the Societies Act. While incorporating is not always mandatory, the benefits of incorporation, such as limited liabilities for members, make it highly desirable. You must incorporate to obtain funding through provincial and federal departments and f or 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, you will pay an annual fee 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 https://novascotia.ca/sns/access/business/ready-register-business.asp.

Helpful Tip:
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.

Canada Revenue Agency (CRA)

You will require a business number (BN) if you are going to collect HST or pay wages/salaries and make employee tax remittances, and also for some licences and permits. A BN is a common identifier that simplifies dealings with government at both the federal and provincial level. Your BN also forms the basis for your HST and payroll numbers. Nova Scotia uses the BN for services such as licences, permits, registrations, and Workers' Compensation Insurance.

Businesses receive their BN 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 per cent 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 are considered small suppliers if "the total amount of all revenues (before expenses) from the world-wide taxable supplies of all of the organization's activities, and those of its associates, is $50,000 or less in any single calendar quarter and in the last four consecutive calendar quarters."

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.

[1] Canada Revenue Agency, GST/HST Information for Non-Profit Organizations. Found at https://www.canada.ca/en/revenue-agency/services/forms-publications/rc4081/gst-hst-information-non-profit-organizations.html

Even if you are not required to, you may wish to voluntarily register for and collect the HST. This gives you the advantage of being able to 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 you supply. Check out the document, GST/HST Information for Non-Profit Organizations available at https://www.canada.ca/en/revenue-agency/services/forms-publications/publications/rc4081/gst-hst-information-non-profit-organizations.html for details and contacts for additional information.

We strongly recommend you contact the CRA directly, and/or obtain professional advice on tax related questions so you understand the HST rules.

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

Eimployment 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 short periods of time.

The CRA 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 CPP.

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: https://novascotia.ca/sns/access/business/what-do-i-need-to-know-about-taxes.asp.

Workers' Compensation Board of Nova Scotia

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 workers' compensation premiums 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 Workers' Compensation Board of Nova Scotia (http://www.wcb.ns.ca/) for additional information.

Key Takeaways

Regulations and requirements exist at all levels – municipal, provincial, and federal.

Your festival is a business – it should be a registered organization. You will have to register for, and submit, HST and payroll taxes unless everyone is a volunteer.





CHAPTER 5: DOLLARS AND CENTS

Paying careful attention to the organization's money matters earned revenues, fundraising, financial security, financial controls and budgeting – is key to your festival's success.

Revenue Generation

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

Gated or Non-Gated Event

A "gated" event charges for entrance and a "non-gated" event does not. 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 will likely 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 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, this saves you hiring staff 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.

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. Having large sums of cash on hand is also a security risk.

If your event is non-gated (free to attend) but you want to track and limit the number of people who can attend, you can use various online programs (like EventBrite) that will allow people to reserve a seat for an event. Keep in mind, approximately 30 per cent of people who apply for a free event will not attend. Consider providing an overage of available tickets.

Helpful Tip:
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 careful with your ticketing procedures and tracking sales.

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
- caregiver for handicapped person
- special rate for certain groups (e.g. 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 the signage leading to the parking clearly states there is a fee for parking or that a donation is 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

Making money (or just breaking even) through beer and alcohol sales can be difficult for a festival. The costs have become prohibitive and the list of expenses associated with running a beer tent is extensive. What looks easy and obvious is not. Inventory management is difficult and often the transactions are cash. You also have 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. They are then responsible for having the correct licences, 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 to engage a group, such as the Rotary Club, for a combination of flat fee and profit sharing.

The situation 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 potentially make a profit.

Retail and Food Vendor Sales

Small festivals often depend on the revenues generated by vendors. The best way to negotiate with local vendors is to agree on a flat fee. Taking a percentage relies too much on trust and the festival knowing the vendors' business. 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 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 that needs to be diligently managed. We recommend under ordering stock during your first years until you know the demand. You will find that all staff, friends of staff, and relatives will suddenly tell you they want a t-shirt or sweatshirt, but are not willing to buy one.

Helpful Tip:

Forecasting Revenues

Forecast ticket sales moderately – too low and revenues from this source may result in potential funders thinking 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!

Product Sampling

Product sampling is usually done by a corporate company looking to give out samples to their target markets. Charge them a flat fee. Even large, national companies will have limits to what they will pay in order to be on-site giving out samples, so a good agreement could consist of both a flat fee and a contribution of product if, for example, they are giving out food samples. This could go toward 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 giveaway product near a vendor trying to sell something creates problems.

If wine or other alcohol products are being sampled on-site, you will have to work with the vendors and the venue to ensure 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 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.

Budgeting

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

- capital budget
- operating budget
- working capital, cash flow, and 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 not 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 if you require them. In the end, 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.

Be sure 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 you need to produce the event itself.

An operating budget is very fluid and detailed. No expense is too small to include. It can be easy to say, "Oh, that's only $25, not worth a line item." But do that a few times over a year and suddenly that $25 is $1,000. Some small expenses may not need their own line and can be included under miscellaneous office expenses or miscellaneous travel. Include a contingency in your operating budget as well.

Be sure the person handling the budget 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 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. Having a clear and detailed proposed budget lets everyone know the scope of the event's finances.

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

Worksheet #2 in section 5.3 below is a template for a basic operating budget outlining items to be considered when planning your budget, and when tracking where you are with the budget.

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.

Partners and/or sponsors may 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 credit cards is helpful as well.

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



Procedures and Controls

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). Having 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 on next page for event budget.



Key Takeaways

Festivals can earn money from tickets or gate admissions, parking fees, on-site sales of food and beverage, or merchandise. Figuring out how much you can earn requires a little work.

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.

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 and 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 and Promotion Expenses			
Advertising / Design / Print			
Internet and Digital Media			
Media Relations and PR			
Subtotal Marketing and Promotion			
Contingency			
Total Expenses			
Surplus / Deficit			



CHAPTER 6: PARTNERS & 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.



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 you can also target in-kind contributions as well as cash. Local companies and individuals that are unable to donate cash may be able and willing to donate materials, supplies, and services.

You may want to consider online crowdsourcing to engage the public in supporting your event. You can find information on crowdsourcing in Canada at https://ncfacanada.org/frequently-asked-questions-faqs.

You should establish a separate sponsorship committee, since sponsorship 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.

Government Support

Government investment is available through Events Nova Scotia, a division of the Nova Scotia Department of Communities, Culture and Heritage (CCH). Events Nova Scotia and CCH invest in events and festivals that help deliver on the Nova Scotia Culture Action Plan and the Nova Scotia Event Strategy.

You can find and review the goals in each of these documents:

Nova Scotia Event Strategy: http://eventsnovascotia.com/wp-content/uploads/2018/12/Events-Strategy-English.pdf

Nova Scotia Culture Action Plan: https://novascotia.ca/culture/Culture-Action-Plan--English.pdf

The Nova Scotia Event Strategy's goal is to attract and develop authentic Nova Scotian events, harnessing our natural assets and unique culture to create social and economic benefits for all Nova Scotians, while leaving a legacy of growth for culture and sport.

The strategy revolves around six key pillars which provide focus for government and communities on the development and attraction of events:

- New Event Funding Themes
- Event Culture
- Education and Capacity Building
- Positioning Nova Scotia
- Measurement
- Legacy

Contact the Events Nova Scotia team to discuss your festival or event idea before applying for funding: http://eventsnovascotia.com/contact-us/

Sponsorships

Many festivals and events rely on sponsorship programs as a means of raising capital and operating funds for their event. To be successful, festivals need a good combination of public- and private-sector funding. If your festival is a large one and you are seeking extensive sponsorships, contracting a professional fundraising group may be worth your while.

Having the right people on your board of directors can help 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.

Sponsorship

"In addition to brand awareness and visibility, sponsors have been increasingly supporting social responsibility and prefer to be aligned with event partners that can deliver positive results in the community."

Larry Peach, Marketing Coordinator
Gran Fondo Baie Sainte-Marie, Clare

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 and 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

Follow this process to identify and close sponsor opportunities

Step 1: Research

Research 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 the festival would serve only 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 point 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

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

Step 3: Set Up a Sponsorship Contact Spreadsheet

This spreadsheet will become the sponsorship "bible" you will work from for the current year's events and keep notes on 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. In other words, 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 start courting them for the next year. Speak of your successes at that time. The spreadsheet will also help you track progress and follow up.

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.

Helpful Tip:
Possible Sponsors

Court the potential big sponsors for the first edition of your festival. Invite them to attend as your guests so 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.

Step 4: Create a Sponsorship Package

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

Step 5: Approach the Sponsor Prospects

Don't cold call potential sponsors; you need 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.

Sponsorship

"Securing sponsorship is the beginning of a long-term relationship. It is important to show sponsors value by creating brand awareness and visibility as well as marketing and sales opportunities. Once sponsors feel your event is delivering value and results, they will continue to support it. Our accommodation sponsorships have been successful due to this strategy."

Larry Peach, Marketing Coordinator
Gran Fondo Baie Sainte-Marie, Clare

Make an appointment with the person who has the authority to say yes. 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 and that you are open to working on a partnership that works best for them.

Listen and ask questions so you 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 inform them about the event and your vision.

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 with changes, 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 handholding. Sometimes, an introductory phone call and a generic

Step 6: Build the Sponsorship Proposal

Once you've researched your potential sponsors, 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 the sponsor (what measurable results they want to see)

You must now decide at what level to pitch them.

If you go in at too high a level, sponsors may 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 align with their needs. 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 because the proof is already established.

Helpful Tip:

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 the sponsor, as well as you, is aware of each other's expectations. Before putting together a final contract, send a follow-up email outlining what had been discussed at the meeting and your understanding of the terms and conditions.

Stewardship

Your obligation does not stop once you get a yes. Your team must ensure 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.

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 return on investment (ROI). 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.



Working with Tourism Partners

"As a lean team of two year-round – planning, programming and fundraising for Devour! – it became evident that we needed to involve experts along the way. We struck a volunteer Advisory Council with members from both the film and food industries. These people open doors for us, suggest programming, work with us at the event and in their respective markets. We also partner and work with other like-minded festivals and events to share programming and connections. These kinds of relationships are invaluable."

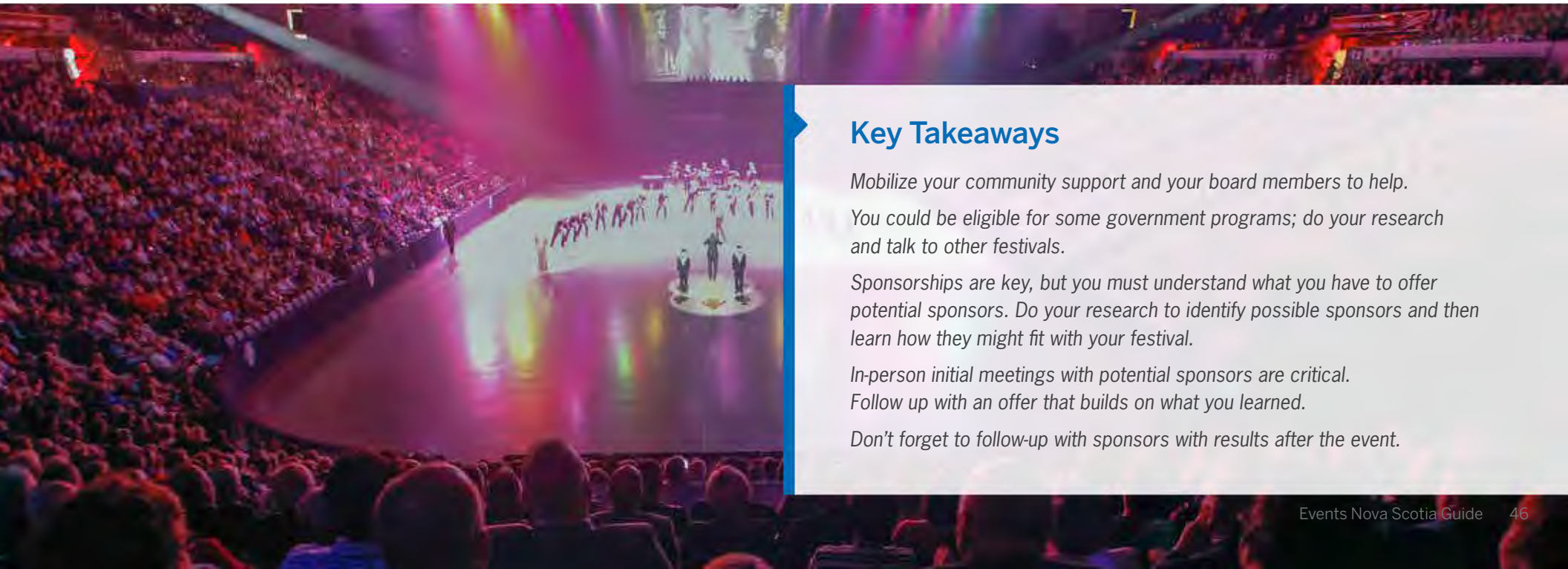
Lia Rinaldo, Managing Director, Devour!
The Food Film Fest, Wolfville

Tourism and Community Partners

Beyond sponsorships, you may be able to establish partnerships with the tourism operators in your area who stand to benefit from having visitors come to the area for 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, you may find 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 creating and marketing packages. A package is two or more tourism products and services that are sold 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 visitor, to entice them to take part in the festival or event and increase how much they spend. Some tips on developing and marketing packages are provided in Chapter 11.



Key Takeaways

Mobilize your community support and your board members to help.

You could be eligible for some government programs; do your research and talk to other festivals.

Sponsorships are key, but you must understand what you have to offer potential sponsors. Do your research to identify possible sponsors and then learn how they might fit with your festival.

In-person initial meetings with potential sponsors are critical. Follow up with an offer that builds on what you learned.

Don't forget to follow-up with sponsors with results after the event.



CHAPTER 7:
THE PEOPLE

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

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 acting on it
- 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 – the ability to make sponsorship connections within the business community
- Expertise – knowing what needs to be done

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.

Board of Directors and Committees

Events are usually started by people with a passion for an idea and their community. Invite people onto the board who are not only visionaries, but also bring a particular expertise needed to make a successful event.

Support Your Board of Directors

"We have worked hard over the years to put the right board in place that serves the festival properly in its continued growth. So, it's important to give them the tools and comfort level to support that. For the past several years, we have engaged consultants at the board level to help us in each phase, last year we completed a five-year visioning and strategy process. This year, we are enlisting a consultant to address board governance."

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

The Board of Directors

A board of directors is often established to oversee the direction, development, and finances of an event. They are hands-off in terms of daily management. Festival and event 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 fewer. 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 to play the part of overseer; 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)

The board must also establish an organizational structure and assign responsibilities, such as signing authorities, responsibility for contracting, etc. You need 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 (https://www.csc-ns.ca/what-we-do), 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 subcommittees to provide better direction and oversight to the most critical areas, such as the following:

- Programming/artistic
- Sponsorship and fundraising
- Government funding
- Marketing and media relations
- Finance
- Volunteer development
- Production and logistics

For larger, more significant events, management and staff can handle some of these functions, such as programming/artistic, marketing, and sponsorship.

Management and Staffing

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

The following are various areas requiring management and staff:

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 setup and teardown
- 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
- Social media engagement and web platforms
- Media relations
- Group sales
- Function reservations

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. The better option is to add more people later than to start with a top-heavy organization that gets overly entangled in its own structure.

Support Your Board of Directors

"It's ALL in the details. With over 100 events in the span of our week-long event and so many departments and people feeding into each and every single one, it's important to capture every detail and ensure it's shared with the right team members and partners to deliver that experience. We love Google Docs."

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

Training

Training for event staff and volunteers can be done through orientation sessions held on- or off-site a few days before the event. These would include security training, box office training, and sessions about radio use, cell phone use, and etiquette. Be sure to make cultural competency training mandatory for all staff. Cultural competency training ensures everyone understands the importance of inclusion, diversity, and understanding, creating a positive experience for all participants.

Uniforms and Other Identifiers

Staff and volunteers need to have some sort of uniform or identifier. The uniform can be a unique event t-shirt (preferably brightly coloured so they can be easily identified by audience and staff), festival cap, or 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 EVENT 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 event's expectations of behaviour from staff and volunteers. Having expectations clearly stated at the beginning makes it easier on everyone. 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 is much easier to loosen the rules once they are in place than to try to apply restrictions after the fact. Find a balance between being too strict and simply outlining your expectations for the best behaviour from each person, as befitting your festival goals and objectives.

The Event Manual

Put all of the foregoing information in a master manual and provide copies to each working group as a reference document. The manual should contain at least the following:

- Overview and/or history of the event
- Site plans
- An event program
- 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 details for staff and volunteers
- Volunteer recognition party details

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 their 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 their 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 inquiries; never give interviews or answer media questions; always politely refer them to the general manager*
- *never smoke in uniform*

- 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. Code each task as a "must have" or "want to have," with emphasis given to the former.

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.



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' need to be given the same level of care and support as paid employees, 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 toward attracting the interest of potential volunteers and keeping them motivated and involved.

Identify some of the 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.

1. Volunteer Nova Scotia is an online resource tool that will help match organizations with volunteers and vice versa. As an organization, you can create a profile page and advertise your volunteer positions to registered volunteers. For more info, see http://www.volunteerns.ca.

2. Social media is a great way to recruit volunteers. Post 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

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. Volunteer Canada has a 10-step process for screening volunteers as well as some basic information at https://volunteer.ca/vdemo/researchandresources_docs/10%20Steps%20of%20Screening%20Brochure.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 to check 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 this comprehensive screening handbook https://volunteer.ca/vdemo/researchandresources_docs/2012%20Edition%20of%20the%20Screening%20Handbook.pdf.

Orientation and Training

Having 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 they have a clear idea of what is expected of them.

Having an orientation is also 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.

Orientation and training sessions can seem to take up your time close to the event, however, you need 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 and 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; therefore, everyone must wear safety boots and a hard hat. Check into the rules and regulations well before your first setup 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. This 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 Staffing section.

Recognition

Be sure 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. If possible, the volunteers could also be thanked as a group each day over the PA system.

Most people simply want to feel 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, 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 a 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.

Meeting with volunteers after the festival is important to get their input as to how things went, identify problems that need to be addressed in the future, and 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.

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

Numerous resources are available on recruiting and working with volunteers. Check out http://novascotia.ca/lae/volunteerism/ for resources and links to other sources.

Key Takeaways

Your festival needs strong leadership – from the board and from management, whether they are paid or volunteer.

Volunteers are the backbone 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.



CHAPTER 8: OPERATIONS & LOGISTICS

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

Site Development

Operations and logistics involve everything 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 lineups 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 needs to be done. Include a timetable and assign responsibilities.

Identify milestone dates for operations and logistics; for things like getting funding commitments, lining up sponsors; and for finalizing the program and meeting deadlines for marketing. Keep track of where you are 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 event 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 event. If your event 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 we advise working with more experienced adult staff and volunteers for larger events.

Towing vehicles at an event should be reserved for those blocking emergency vehicle access or bus lanes only. If possible, tow the vehicle to a safer area rather than moving them completely off the site.

Communications

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

Some events may use up to three channels or more with security, parking operations, and general operations all 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.

One main 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.

Event Program

People attending the event 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, 20+ page programs 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.

Visitor 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/Lost and Found

Your lost children area 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. Make sure you obtain proper identification before allowing someone to pick up a lost child. A good rule is to ensure the child can only be released once a staff/security person is on hand to confirm the parent or guardian is properly identified.

Lost and found could be included in this same area or at the front gates or festival office. You will want a secure place to store valuables that are recovered.

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, 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

- communicating 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
- dropping off and picking up

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

Group Functions and Catering

You may be able to arrange catering 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

You should have a separate area where staff and volunteers can 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. Other festivals have 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, possibly the local municipality.

Site/Waste Management

Recycling is a concern for events. The types of items and services offered and 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.

Be sure your food vendor contract states 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 also be provided for vendors, staff, and volunteers.

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

The province provides resources and links regarding recycling and waste at http://www.novascotia.ca/nse/waste/.

Vendors

Vendors with festivals and events experience are generally self-sufficient. They usually need electricity and sometimes water depending on what service they are providing.

Vendors will more than likely need vehicle access directly 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 the following:

- Hours of vendor operation
- Expectations of operating hours in case of bad weather (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 (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?)
- Setup and teardown schedule
- Fee and/or percentage agreement

- Type of product allowed; for example, 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 (to avoid vendors undercutting one another)

Keep pedestrian traffic flow to and from the concession area in mind. Make sure 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, get legal advice.

Food and Beverage

In smaller community events, the food service is often provided by a local volunteer group that does all the purchasing, preparing, and selling. Proceeds either go back to the festival or are 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. Contact the vendors at your local farmers market as well as known food trucks if you have space for them. You will be able to determine what works best and which vendors are the most professional to deal with by speaking with other festivals/events.

Retail

Visitors to events 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 decide whether to include only one-of-a-kind and craft-type items, or to allow mass-produced products.

Outline items, logos, or themes that you will not accept on site in your contract with the retailers. 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 is set for 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.

Equipment

Developing a comprehensive list of required equipment is essential if you want to save money and staff power and still 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 pickup 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? You may be able to rent or borrow them from the municipality. Otherwise, they can be 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.

All tents used on-site must comply with Canadian Fire Standards (CAN/ULC-S109-M / NFPA701). (Note that U.S. fire-treated tents do not meet these standards.) Your tent must have the original manufacturer fire retardant tag attached. Your tent must be equipped with a 5 lb A.B.C. fire extinguisher, or the appropriate fire extinguisher (depending on the type of product you are selling).

Helpful Tip:
Tents

Include the paragraph stating all tents used on-site must comply with Canadian Fire Standards (in bold) 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.

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 and you have enough supplies (tissue, hand towels, hand cleanser).

Wheelchair-accessible portables are available and required by law.

Barricades

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 licensed 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 quickly and tend to get underestimated during the planning stage.

Risers

Risers are sturdy boxes (generally 12 inches 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. 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.

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 rental 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 pickup 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 event, 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, see if a sponsor will be willing to support the festival with in-kind use of office space and supplies. Startup festivals can often 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 should 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 consider 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 may not be when you take a realistic look at maintenance, storage, insurance (including liability insurance), and replacement costs. As well, you will need a staff person to coordinate the rentals, invoicing, payment, delivery, and pickup.

Helpful Tip:
In-kind Sponsorship

Don't restrict in-kind sponsorships 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.



In-Kind Sponsorships

In-kind supplier sponsorships are invaluable to any festival, as long as they are supplying an item you would normally spend money on to rent or buy. Having a master equipment list makes it simpler for the sponsorship coordinator to negotiate contracts with sponsors. They may even be able to work out deals if no sponsorship is available.

Setup and Teardown

You will require anywhere from a week to a day before and after your festival for setup and teardown. Keep this in mind when booking your site dates. Setup and teardown always takes more time than you expect.

Key Takeaways

A site plan, even a hand-drawn one, is invaluable.

Operations and logistics cover everything the visitors see, touch, or do on-site. Be detail-oriented: have a schedule and a critical path and keep them up to date.

Have clear contracts with all your suppliers, including food and retail vendors.





CHAPTER 9: PROGRAMMING & PRODUCTION

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

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 subcommittee's goals is essential to a successful event. An experienced artistic/program director will know about proper etiquette in regard to formal offers to artists, contracting and technical requirements, and will have other important insights into the industry.

Helpful Tip:
Artistic/Program Director

Programming 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. The challenge is finding the right people.

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.

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, or 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, volunteers, 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.

Helpful Tip:
Proximity Clauses

Be careful of proximity clauses in contracts. These are becoming bigger issues, particularly in the U.S. 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.

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 having a qualified artistic director is an asset. Bands come with various types of riders.

There are technical riders (specific requirements on the type of equipment or musical instruments, the exact stage setup 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 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 is a great benefit to your event. Outdoor venues are much more complex than events held indoors. They can bring unexpected situations, such as 70 km/hour winds and a thunderstorm resulting in ruined soundboards. Even a small, one-day event is best served by staff who have 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-inch 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.

If your stage is too small, your audience will complain about not being able to see everything. Too large, and your acts will look lost and your audience will complain that everything is too far away. Research and 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

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

- transporting artists from the airport, to and from hotels for sound checks and show, and back to the airport
- providing refreshments and snacks in the artist trailer, tent, or green room
- fetching the performer for sound checks and show time
- arranging meals
- delivering welcome packages to hotel rooms (for artists, delegates, VIPs)

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

A production schedule is essential for anyone involved in the technical production of a more involved show. 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 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 going over budget because of overtime.

Helpful Tip:
Hospitality

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

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 need professional help and possibly 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.



CHAPTER 10: WHEN THINGS 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.

Contingency Planning

Murphy's Law states "If something can go wrong, it will." While that may not always be true, it often is. The best 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 the following:

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

Problems of an emergency nature require more extensive arrangements.

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

Risk Management

Risk management is a strategic process that will improve your ability to identify, analyze, 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 proactive in risk management and keep well-documented records of the risk management process you follow. 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.

Some 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, emergency management officials, waste removal, and fire. Meeting with this task force will help you identify partners required to organize your event, and their experience will help you identify any common risks you should be aware of.

Some Aspects of Festivals and Events that might Create Risks

- *Health concerns, viruses*
- *Arrivals and parking – cars, trucks, pedestrians*
- *Crowd disturbances and controls*
- *Stages*
- *Sale of alcohol on-site*
- *Food preparation on-site*
- *Lineups*



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 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 lit areas
  - poorly marked entrance/exit areas

Step 2: Evaluate and Prioritize the Risks

Assess the likelihood of each identified risk 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

You will not 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.

Insurance

All event operators must carry insurance, regardless of the size of the festival, and you may be required to carry insurance in order to obtain some permits and licences. 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.

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.

You will need two main types of insurance:

- General liability insurance covers claims made against your festival for bodily injury or property damage arising from your operations. This is commonly known as third-person liability insurance.
- Director's and officer's liability is important for a not-for-profit organization with a board of directors. This covers directors for wrongful acts such as wrongful dismissal and 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 your board members are much more comfortable if you carry this type of insurance.

You may also want to consider the following, depending on the scope/scale of your event:

- Equipment coverage insurance protects your festival's equipment, including maintenance equipment, restaurant equipment if you operate a restaurant or canteen within the attraction, etc.
- Rain cancellation insurance is expensive but may be worth it for your event.
- Crime insurance protects you from the loss of money, securities, and other property. It is sometimes divided between losses that take place inside the business premises (such as employee dishonesty) and losses that occur outside the business premises (such as theft and robbery).

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 about your specific requirements and needs. Remember: Your insurance costs will increase significantly if you have beer tents or any other areas with alcohol being served.

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.

Read more in the guide "Insurance and Your Non-Profit Organization" at https://www.novascotia.ca/finance/site-finance/media/finance/InsuranceGuideNon-Profit.pdf.

Security, Emergencies, and First Aid

As suggested already, connect with your municipality's Special Events Task Force 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
- your own security people and/or other officials responsible for the site you will be using

The objective here is to ensure everyone has the same basic information in the event of an emergency. Address issues such as site locations of concern, hours of operation, expected crowd sizes, expected problems or concerns, etc. Be sure to develop a site map (see Site Development, Chapter 8) and plan for emergency response and access, 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 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 — such as accident, evacuation, fire, medical emergency, site grid, access/egress — is critical. An evacuation and emergency plan can be as simple as having all emergency services people in your community knowing how to access the festival site on foot or by vehicle. Or, it can be 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

Distribute a contact list with cell phone numbers or emergency numbers to all staff, volunteers, and your security team. A larger list with all contacts is useful, but a smaller list with key contacts can 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 a critical part of emergency plans. Event staff and volunteers need to know who makes the decision to implement an emergency plan, how that decision will be communicated to staff and volunteers, and to visitors, if necessary. You need a plan for communicating with emergency services personnel and for communicating within the festival staff and volunteers.

Make sure staff and volunteers are clear on whom to call in case of an emergency or crisis. A phone tree is 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, which can lead to mis-use. Establish operating procedures (how to use a radio, dos and don'ts on air), and encourage everyone to follow them. Remember, you never know whom the people with radios are standing next to!

Another important procedure is having a code red call for emergencies. Once a code red is called, all radio traffic conversation is to cease 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.

You can also designate a second channel 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

If you have past data, you may be able to predict the kind of audience you are going to attract, the approximate number of people expected to attend, as well as the periods of peak activity. This allows 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, you will need more security personnel, 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 getting out of hand. Your problem crowd could be any group with too many people competing for access and seating, for example, 500 senior citizens trying to fit into a space for 200 will most definitely be a problem. With your site plan in 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 when the event is over
- what will happen if people start lining up before your gates are open
- whether lineups at the food concessions 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 need to provide emergency medical services. 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.

One option is to ensure that any staff or volunteers with advanced first aid training are on-site and accessible at all times.

Another option is to arrange for an organization that provides first aid, such as St. John Ambulance, to staff your event. Some organizations will do this for free, or for a nominal charge. Meet with emergency service professionals (fire department, police, paramedics) to get an idea of the requirements or their recommendations for first aid care at your event. They may advise you to have an ambulance and paramedics on-site during all, or part, of your event.

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 the fire department. Working out a communications and response plan with your local emergency services organizations is essential.

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 require a security coordinator along with paid security personnel to handle the more demanding aspects, with volunteers assisting with the more routine duties.

Having a security staff with a calm, positive attitude and professional conduct will lead 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. Security personnel need to accept that all visitors are customers and should be treated accordingly, and in a courteous and respectful manner.

When 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.

Accreditation – Who Goes Where

Accreditation means authorizing different categories of people to have access to different parts of the site. You need an easy-to-understand system of controlling who goes where. Accredited people who are properly identified by uniform can also provide visitors with access to the right people for information or directions.

Accreditation is not something required only at big events; every event needs it. The complexity or simplicity of your accreditation system will vary depending on your level of need for security and control.

In assessing your accreditation system, ask yourself these questions:

- Do we care if everyone has access to everywhere?
- Are there sensitive documents, 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?

Your system should make it easy to quickly recognize different categories of accredited staff, media, and volunteers, particularly for those areas accessible to visitors. Use badge colours that are distinctly different and can be distinguished even at night.

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

Working With the Media

Communicating with the media about an emergency requires special preparation. 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 to whom they should refer media queries.

A few important pointers:

- 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 to elicit such a response. Respond by repeating the relevant facts in your prepared statement. Answer only those questions within the scope of your prepared statement and your prepared responses. Others should receive a "no comment" response.
- Never try to outwit an interviewer in a verbal contest. You risk saying something you shouldn't or something that can be taken out of context.
- Terminate the interview once the foregoing process concludes, with a statement as to how further communications will be handled.

Key Takeaways

Contingency planning is the first step to 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.





CHAPTER 11: MARKETING YOUR EVENT

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

Introduction

Marketing used to mean traditional advertising like radio spots, newspaper advertisements and flyers. But these traditional media are only a small piece of the marketing mix for festivals and events today. Growth in online 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 online marketing and social media are the only promotional tools available for you. Other promotional activities can be effective in generating visitation, even with a limited budget. You just need 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 novascotia.com and other marketing channels
- 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, online marketing, social media, and other tactics. Finally, it talks a bit about tracking and measuring your results, as well as adjusting your marketing activities in response to your findings.

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.

Digital Media

Digital media includes popular social media platforms like Facebook, Instagram, and Twitter, along with less-considered channels like e-zines (digital magazines), text messages, blogging, and web advertising. Many festivals and events prefer digital media because it can be less expensive than traditional advertising. Digital media is typically a two-sided communication, making it easy to engage followers and measure your impact. Using social media platforms, in particular, can increase awareness and boost sales. The goal is to create and share interesting content your followers will engage with by purchasing a ticket, RSVP'ing to your event, sharing your posts, or interacting with your page.

Public Relations (Publicity, PR)

Public relations (PR) is all about your festival's image. When PR works, it 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.

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 following 4 P's covering all aspects of the festival as illustrated to the right.



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? Include the various marketing tactics you intend to employ and a timeline f or 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 initiative
   - Tracking methods to measure the effectiveness of each initiative

Branding

Having a recognizable brand (logo) is helpful, particularly one that communicates the unique appeals of the event and its market positioning relative to other events. The logo 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.

Your logo should be something simple and easily reproduced. Use it in all your marketing materials and promotional activities. You will want to use the same logo year after year, so take some time (and perhaps get some help) to create it.

Marketing Tools

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

- Internet – website, blog, e-bulletins/email
- social media (Facebook, Instagram, 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 — this is a basic tool used for submitting information to the media.

Start spreading the word of your event as soon as you can on 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 so people can follow up on the promotion online.

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

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

Website

The Internet essential for marketing for festivals and events. But before you start spreading word about your festival, you will need a good website.

Your website will be the hub of your online marketing. Your website is where you will send people for all the information about your event (dates, locations, schedule, tickets, etc.). All other online marketing activities will grow from your website so be sure to include your site on all your promotional material (posters, brochures, etc.).

You may be tempted 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 belongs to you and won't be subject to the constant changes that can occur with social media platforms.

You can easily build your website using any of the free online tools such as WordPress, Weebly, and Wix. They also offer upgraded accounts for more options and personalization.

Your website needs to be easily found by search engines like Google and Bing, so be sure to research how to use keywords and search engine optimization (SEO).

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. Make sure people don't have to go through too many links to get the information they're looking for or they may give up and leave. Your website should also be mobile friendly.

Link your website to your sponsors' and partners' sites and encourage them to link back. Also, 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 will grow your overall social media reach.

Google Ads

One way to drive traffic to your website is through Google Ads. This service guarantees your ad and a link to your site will show at the top of the results page when someone does a search using keywords that you choose and pay for. Additional information, step-by-step instructions on how to sign up, and fees can be found on their sign up page (https://ads.google.com/intl/en_ca/getstarted/).

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.

Social Media And Online Marketing

Social media and online marketing are the most effective and wide-reaching promotional tools for every event. However, being good at Facebook and Twitter does not mean your online marketing campaign will be successful.

Social media can be confusing because it is constantly growing and changing. Your success depends on choosing which platform(s) will work for you, establishing a plan to use it/them, and then putting that plan in action. Social media is not about broadcasting your message, but engaging with your audience, so be sure to listen and respond.

Social media management should be a dedicated role for a qualified staff member or trusted volunteer; budgeting the staff power 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.

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

Facebook

Facebook is one of the most popular social networks and is an ideal platform for events and festivals. Set up a page for your festival, making sure you include all the relevant information and some strong images for the cover and profile photos.

Share your page with your supporters, sponsors, and volunteers, and get them to share it on their pages. This will help grow your follower base.

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 your followers will see all 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.

Keep the text in your Facebook posts to a few brief and clearly written lines.

Use 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 other demographic information. Insights also allows you to see the reach (how many people saw the post), as well as the engagement (likes, 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 (that is, with no paid promotion) reach for a post is between 5 per cent and 20 per cent of your followers. Facebook also allows you reach more people through Facebook advertising.

For a small investment, Facebook 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. The more you spend, the larger your post's potential reach.

In order to run a paid Facebook campaign, you 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.

Similar 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 messages. While Twitter allows a maximum of 280 characters, we recommend going with 40 characters or fewer. 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 username for your festival, making sure that you include all the pertinent information and images for the cover and profile photos.

Third party applications, such as Hootsuite, Tweetdeck, Buffer, etc., have scheduling options that let you plan your tweets in advance. Twitter also supports video and images, so make use of visuals to catch attention.

Be sure to follow accounts that are related to you (other festivals, local businesses, sponsors, entertainers, etc.) and engage in conversation. Come up with a hashtag (i.e., #ourfestival2020) that you'll use during the festival and share it so 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 a social media platform you can use to showcase your festival through photos. Instagram is a mobile app and can only be used on smart phones and tablets. 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 to use during the festival and let your followers know about it. Attendees will use it to post about your event and share their personal photos. By searching for your hashtag after the event, you'll be able to track what was said and shared. Don't forget to comment on their photos and thank them for attending.

Several different apps allow you to "regram" (repost) photos in Instagram, 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. You can also boost your Instagram posts by paying for advertising.

For more information on specific platforms, check out these resources:

- 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 Online Marketing Techniques

Blogs

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

Planning is important for a successful blog. If you want loyal readers, you need to create new content on a regular basis, so map out what topics you want to write about and schedule when you will launch those blogs. Use your other platforms to promote your blog — 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; not all your followers will see every post, so recycling appropriate 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 directly reach people who are interested in your event. Canada's anti-spam legislation (CASL) requires you to obtain permission from an individual to contact them by email. Building an email list takes time, but is worth it. The quality of your list (that is, the people who are interested in your event) is far more important than the size.

Some ideas for building lists include

- having a sign-up form on your website and Facebook page
- promoting your list on social media
- running a contest in which you ask for people's email on the bal lot along with an opt-in for receiving emails
- asking your volunteers, supporters, sponsors, and friends if they would like to be added to the list
- asking people you talk to about your festival if they would like to be added to your list

You can use free online newsletter applications (such as MailChimp, Constant Contact) 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, sending emails monthly or every two weeks will be enough and won't be regarded as unwanted spam by your subscribers.

Helpful Tip:
Email Marketing

Email is still one of the most effective online marketing tools, as open rates can be as high as 20 – 30 per cent. Build respect among your fan base by keeping messages to the point.

Other Promotions

Several other promotional methods can be effective in building awareness and motivation to attend a festival.

Brochures, Flyers, Posters

Flyers and brochures can be expensive to produce and tend to have a low ROI as a marketing tool, but do have their uses. For example, having one gives you a "leave behind" when pitching potential partners or sponsors. Think carefully about whom you want these pieces for and design them accordingly.

Partners and/or sponsors can really help in this area. Offer to feature them in the brochure in return for them funding 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, and billboards.

Local radio and newspapers can be affordable and will get the attention of locals, but reaching outside of your immediate area

can get expensive. If you don't have a major TV sponsorship, you probably won't have TV in your budget for the first few years. Billboards are also expensive, and their reach is limited.

If you do decide to go this route, get sponsors to help by placing ads on your behalf and/or by adding a "banner" about the festival in their own advertising.

Ways to make your advertising dollar go further:

- Your local printer will have some expertise in ad design and layout; you can also approach a graphic designer who may be willing to work as a sponsor
- Find a local marketing partner selling a product complementary to yours
- Approach your local newspaper, radio station, etc.
- Work with your local tourist association coordinator
- Talk to a local art or communications instructor/teacher

The point is to 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 co-operative 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

You may want to provide VIPs, sponsors, police and emergency personnel, family members, and volunteers with complimentary admissions as a thank you for their support. This makes them goodwill ambassadors for the festival. You will need to regulate this, however, if you have more than one show and limited seating. Having all 100 volunteers showing up to the same time 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

Holding an appreciation event for the staff, volunteers, sponsors, emergency personnel, etc., is a successful way to build a network of "friends" of the festival.

Promoting Your Event Through Tourism Nova Scotia

Tourism Nova Scotia (TNS) features festivals and events on its marketing channels, including NovaScotia.com and social media. To be eligible, festivals must have the ability to influence and motivate travel, be open to the general public and welcoming to visitors. You will need to have a brief description, some photos, a link to your website and social media and, if possible, a short video. For more information, and instructions on how to list your festival or event see https://tourismns.ca/promoteyourbusiness.

Packaging Your Festival and Event

As mentioned in Chapter 6, you may want to consider partnering with local tourism businesses (such as accommodations, restaurants, and attractions) to create packages that include your festival/event.

A package is two or more tourism products or services that are sold in one transaction, for a single price. Packages can be created for a specific target visitor segment to entice them to take part in the festival/event and increase how much they spend. A package can include admission to your festival and be used to enhance how visitors experience the event. For example, including tickets and overnight accommodations for a sold-out event and an opportunity to go behind the scenes provides an exclusive opportunity for purchasers who will pay a premium to take part.

Packaging is not about discounting the price. Instead, it's about offering added value and making it easy and convenient for the customer to buy. Savings can be part of it, but added value, such as exclusive access and expert insights, can increase its appeal and more effectively entice people to book by offering something visitors can only receive through your packaged offer.

Experiences are clusters of unique activities and services also sold for a single price point: think of them as enhanced or unique packages that also include hands-on activities where visitors learn something by doing something with someone who lives here. Experiences authentically connect visitors to our culture, people, places, and flavours—creating memories they'll share with friends and family back home. They often allow behind-the-scenes access to a special place or connect visitors with local storytellers and experts they may otherwise not have opportunity to meet. These special elements increase appeal of your festival or event to potential customers.

When developing a package or experience, keep the following tips in mind:

- Look to partner with businesses or tourism operators that share your vision and fit with your brand to deliver on elements of your experience or package.
- Plan carefully, with close attention to detail, and focus on your target customers' interests to ensure a quality experience that's delivered consistently.
- Consider including exclusive or engaging activities to add value for your guests, increase your revenue opportunity, and enhance the market appeal.

- Showcase elements that are unique to Nova Scotia, the community, or business, such as local flavours, music, stories, cultural activities, or special locations.
- Focus on your business goal for your package or experience, as well as your theme, when adding packaged components, so the elements align and appeal to target visitors.
- Clearly indicate what is included in the package/experience and the partner businesses who are providing products and/or services.
- Clearly indicate when the package/experience is available (e.g. specific dates or days of the week, offered daily during a specific time period, etc.).
- Price the package or experience to ensure all costs are covered and you and your partners earn a profit.
- State the price per person, per couple, or per family (include maximum family size) and, if accommodations are included, identify whether it is based on single, double, or family occupancy (include maximum family size).
- Include the booking, cancellation, and refund policies.
- Arrange and advertise one point of purchase for the guest to book all package/experience components (the point of purchase business/organization books the other components on behalf of the guest).
- Indicate whether the package/experience requires a minimum number of guests to be delivered. Also indicate when it will be cancelled if the minimum quantity of packages are not sold.
- Promote the package/experience well in advance and on appropriate marketing channels to ensure visitors can find and book it.
- Ensure you are following all regulations, permissions, and laws to offer your experience.

The Nova Scotia Experience Toolkit, offered by Tourism Nova Scotia, provides a series of short videos with tip sheets and worksheets to help you develop and market your packages/ experiences. For more information, visit: https://tourismns.ca/experiencetoolkit toolkit.

Once you've created your package or experience, be sure to leverage opportunities to connect with visitors through NovaScotia.com and other Tourism Nova Scotia marketing channels. Find out more about listing packages at: https://tourismns.ca/promoteyourbusiness.



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.

- Arrange radio/TV broadcasts from the festival site during the event – morning shows, newscasts, weather forecasts, interviews with VIPs, 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.
- Have your sponsors and partner organizations hold their news conferences at the festival.
- 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 co-operation in telling your story.

Publicity and media relations are important for a festival's success and deserve special attention. They are affordable and powerful means of reaching your target audiences. Most festivals have a number of newsworthy aspects and the media organizations will usually be co-operative. It's a win-win relationship.

Media Tools

If you want the media to communicate your story, you need the appropriate tools. These include press releases, feature stories, public service announcements (PSAs), in-person interviews, and more. All are discussed below.

Press Releases

Use press releases in advance of the festival and when really newsworthy events occur.

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.

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 five "W's" (Who, What, When, Where, and Why).

5. The main body text that follows should provide more particulars and a fuller description.
6. End with contact information, including the name, title, email, cell phone number 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 also be provided at the top, following the headline.
7. Include the website address of your organization and links to more detailed information available.
8. The press release should be one or two 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, your organization, or a performer. Writing the story yourself makes it easy for them to pick it up as is, or in edited form, saving them the research effort.

Public Service Announcements (PSA)

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

Photos and Audio-Visual Materials

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 you have a major announcement. You will have to convince media invitees that the news conference warrants their attendance. This is easier to do if you have an ongoing relationship with the media.

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

Give attendees your news release, along with supplemental background material, 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.

Public Relations

Good public relations can build and keep community support for your event.

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

As we suggested earlier, invite tourism front-line staff to the event on a complimentary basis to empower them as goodwill ambassadors.

Measuring and Tracking Results

"If you can't measure it, you can't improve it." Measure the impact of your promotional efforts so you know which ones are generating visitation and sales. This will tell you where to invest, or not, next year.

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 specific metrics. Here are some ideas:

- Survey your visitors to find out how they heard about your festival. (See Chapter 12.)
- If you contracted with an online 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 re 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 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. Think carefully about the results and what they mean for how you spend your marketing dollars next year.

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 central to your success – and that means having a great website that becomes the hub of your online marketing.

Social media can be effective and provides opportunities traditional marketing does not. However, it needs expertise, time, and some money.



CHAPTER 12: POST-EVENT EVALUATION AND PLANNING FOR THE FUTURE

When the festival is over, it's not really over. You still have things to do to make sure it goes more easily and successfully next time around.

Evaluating Attendance and Economic Impacts

Post-event evaluation will help you plan for next year and will give you the information you need to report to current sponsors and partners, and to approach new ones. By engaging with them on your results, they can also help you build a strategy for the future of your festival.

There are several ways 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. Keeping track of visitors at gated events is straightforward, but it can be more complex if you have no admission fees. Here are a couple of ways to approach this:

- Use people counters – either electronic counters 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 such as revenues, operating costs, sponsorships, partner contributions, etc. This will be vital to maintaining and building support in the future.

Surveying Visitors

Survey your visitors either online after the event using tools such as Survey Monkey (https://www.surveymonkey.com/) or while they are on-site using tools such as Quick Tap Surveys (http://www.quicktap-survey.com/). You want to find out the following:

- 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
- Their email address and permission to send them information on your next festival

You need some of this information to do the economic impact analysis (see discussion below). Other parts will help you assess your marketing activities, and some will help you fine tune your event for future years. 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 vital for maintaining support, particularly from public agencies that want to see what the economic ROI has been. Providing this data will keep your event from sliding into their

"discretionary spending" category and will help ensure you get funding for next year's event.

The Canadian Sport Tourism Alliance (CSTA; http://canadiansport-tourism.com/) has three economic impact assessment (EIA) tools (https://canadiansporttourism.com/industry-tools/industry-tools.html). There are two models designed for sports events (STEAM 2.0 and STEAM PRO 2.0), and one specifically for festivals or other events (FEST PRO). You need to be a member of CSTA to use the models or contract them to do so for you, but membership costs are reasonable and 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 these EIA tools.

To use these tools, 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. 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 the EIA, 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, 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 festival

Evaluating the Event

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

One method we recommend is "management by walking around" so you can witness for yourself what is working and what isn't. Do this in an organized fashion with daily reports from festival management people who are mandated to make on-site tours on a scheduled basis.



Keeping Your Friends

The partners and sponsors who worked with you the first time need to be encouraged to keep supporting you in the future. You can accomplish this 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 to explore how to better meet them next year.
- Show them evidence of their ROI. 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.
- Demonstrate how much you appreciate the relationship, either through one-on-one initiatives, or by organizing a collective appreciation event after the festival. This could take the form of a dinner, a group outing, or some other event.

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 should also 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.

Helpful Tip:
Keeping Friends

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

Try to anticipate and pre-empt problems and offer positive solutions from the start.

Countering Volunteer Burnout

Volunteers play a major role in festivals, particularly with community festivals that often have few, if any, staff. Volunteer burnout is a real challenge. Burnout happens when you don't have enough volunteers to share the load and this leads to a few people being expected to do too much. Unchecked, this can lead to an unravelling of the festival organization and the quality of the event going downhill.

To counter volunteer burnout, you need to commit to regularly attracting and developing new people. As discussed in Chapter 7, having a volunteer recognition program in place can help, one that celebrates volunteers' contribution and showcases them as valuable community members.

Building on Success - Growing and Improving the Festival

Having too much success 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. Add only a few innovations 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 so in reality. Move ahead with opportunities, but don't take on too much all at once. Organizing an event is a major balancing act.

At the same time, 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.

Keeping your event fresh and exciting is vital for success, but don't forget your roots or who and what you are. Stay true to your original objectives or you may 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 with 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 reports are received.

Once all of this is done, have your team analyze the data and talk about what worked and what didn't. If everyone agrees it's an event worth doing again, you'll be ready to build on your existing success.

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.



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