SETTING THE STAGE

A COMMUNITY-BASED FESTIVAL AND EVENT PLANNING MANUAL
INTRODUCTION

There are many reasons for developing a festival or event. To celebrate community identity and spirit; to showcase local talent and achievements; to educate, inform and celebrate your community’s culture and heritage or fill a perceived gap in the recognition of arts and culture where you live.

Whether you’re thinking of starting up a new festival/event or wishing to grow an existing one, this manual has been developed to be a fill-in-the-blank tool to help you plan, implement and then evaluate your festival/event.

When organizing any event, the biggest challenge is coordinating volunteers and assigning roles with clearly defined duties. This manual has been divided into standalone sections that can be given to each major team member, outlining their specific duties. Each section includes general guidelines, checklists and worksheet templates which can easily be customized for your specific event.

Much of the information has been compiled from discussions with festival/event organizers, producers and directors. Research was conducted through interviews with Alberta festival and event organizers, locating pertinent information on the Internet and through the practical festival and event experience of Poster Art International Ltd.

FESTIVAL OR EVENT?

AREN’T THEY THE SAME THING? NOT EXACTLY. BOTH ARE EVENTS, BUT NOT ALL EVENTS CAN BE A FESTIVAL.

A FESTIVAL SUGGESTS LONG-TERM PLANNING AND COMMITMENT WITH VALUES, GOALS AND ORGANIZATIONAL STRUCTURE ATTACHED TO IT. IT IS VOLUNTEER-DRIVEN AND USUALLY HAS ROOTS WITHIN THE COMMUNITY. FESTIVALS ARE BRANDED EXPERIENCES AND PATRONS MAY NOT HAVE ANY KNOWLEDGE OF THE PERFORMERS OR ACTIVITIES; THEY’RE ATTENDING TO ENJOY THE ENVIRONMENT THAT HAS BEEN CREATED.

EVENTS ARE OFTEN SHORT-TERM AND FOCUSED ON A SPECIFIC PERFORMANCE OR ACTIVITY, ALTHOUGH IT MAY EVOLVE INTO AN ENDURING OCCASION...AND YES, EVEN INTO A FESTIVAL.
ABOUT THIS MANUAL

PART ONE IS FOR THE ORGANIZING COMMITTEE

Throughout the planning process this section helps you address high level planning issues and needs. It identifies all the functional components of every festival/event, regardless of size. It will also help you clearly define what your festival/event should achieve and be about and provide guidelines for structuring your organizing committee.

PART TWO CONTAINS GUIDES FOR SPECIFIC COORDINATORS OR SUB-COMMITTEES

These guides are for the people doing the actual work to make your festival/event a success. It is divided into six stand-alone sections by function, e.g., fundraising, volunteer recruitment, media relations and promotions, so they can be given to the major team members. The roles and responsibilities for area coordinators/sub-committee chairs are defined and tools and templates for managing these responsibilities are included.

PART THREE PROVIDES TOOLS & TEMPLATES FOR EVERYONE INVOLVED

Coordinators/sub-committee chairs as well as the organizing committee can use these templates for assessing resource needs as well as developing schedules, timelines and budgets.

PART FOUR DEALS WITH STRATEGIC PLANNING

This section is designed to help enhance and evolve your festival/event for future years. The organizing committee should use it with input from area coordinators/sub-committee chairs.

Click on these quick links to jump to specific sections

1. PART ONE IS FOR THE ORGANIZING COMMITTEE
2. PART TWO CONTAINS GUIDES FOR SPECIFIC COORDINATORS OR SUB-COMMITTEES
3. PART THREE PROVIDES TOOLS & TEMPLATES FOR EVERYONE INVOLVED
4. PART FOUR DEALS WITH STRATEGIC PLANNING
TOOLS FOR OVERALL PLANNING

A. DEVELOPING THE IDEA
B. ESTABLISHING THE ORGANIZATIONAL TEAM
C. PLANNING & LOGISTICS
D. DEVELOPING A BUDGET
E. CREATING A FESTIVAL/EVENT SCHEDULE
F. FUNDING
G. EVALUATION

EVERY EFFORT HAS BEEN MADE TO ENSURE THAT ALL INFORMATION IS CURRENT AND UP TO DATE AT THE TIME OF PUBLISHING HOWEVER, ALL INFORMATION IS SUBJECT TO CHANGE AND WE ENCOURAGE THE USER TO CONDUCT ADDITIONAL RESEARCH TO ENSURE THE INFORMATION PROVIDED IS THE MOST CURRENT.
INTRODUCTION

SOME OBJECTIVES FOR HAVING A FESTIVAL/EVENT INCLUDE:

- strengthening community identity and spirit
- providing a venue for local artists and artisans to showcase and sell their products
- bring an awareness and appreciation of the culture and heritage of the community
- improve the local economy
- acquaint the local and outside community to the unique opportunities within your community

WHATEVER YOUR REASONS, IT’S ALWAYS WISE TO START SMALL UNTIL YOU HAVE THE KNOWLEDGE AND RESOURCES TO MANAGE SOMETHING LARGER. PLANNING DEVELOPS YOUR IDEA TO THE POINT YOU CAN:

- organize a group
- develop a specific strategy to maintain and sustain your festival/event
- create a time frame for the actions needed to initiate the festival/event
- establish individual roles and responsibilities
- determine the resources needed
- develop tools to assess your festival/event and make the appropriate changes

This section is designed to help you get a ‘handle’ on your event and openly define your goals. Establishing consensus at the outset will keep everyone in your growing organization on track with the committee’s overall vision.
A. DEVELOPING THE IDEA

Shepherding your event through initial concept to reality requires an understanding of the interests, diversity and trends of the community. Your first steps will be:

- Communicating with stakeholders, associates, civic and community leaders about your idea
- Finding people who will help turn your idea into a workable festival/event

DETERMINE YOUR GOALS

After surveying the community for interest, ideas and recommendations and forming a group of interested people, you can begin to develop a statement of what your festival’s/event’s objectives are going to be and how you plan to achieve them. Take time to develop both a Vision Statement and Mission Statement through discussion of the values, goals, contributions and growth that is anticipated.

**THE VISION STATEMENT PRESENTS THE ULTIMATE GOALS (PURPOSE & VALUE).**

**THE MISSION STATEMENT CONVEYS THE STRATEGIES FOR ACHIEVING THE GOALS (MEASURING SUCCESS).**

More information on vision and mission statements can be found at The Free Management Library, [http://managementhelp.org/strategicplanning/mission-vision-values.htm](http://managementhelp.org/strategicplanning/mission-vision-values.htm)

Once your group has refined what objectives they want to achieve and the tools for achieving the goals for the festival/event, you can write a final Vision and Mission Statement.
AN EXAMPLE OF A VISION STATEMENT COULD BE:

- Develop as a community leader in the knowledge, understanding and preservation of the cultural heritage of the community.

THE MISSION STATEMENT WILL SET OUT THE ACTION TAKEN TO ACHIEVE THE VISION. FOR EXAMPLE:

- To have a community that is more knowledgeable and motivated to preserve our cultural heritage we must provide an environment that promotes, celebrates and nurtures the unique features of our past to address our present and future.

As you develop your concept in more depth, there should be discussion regarding the suitability of your festival/event with the community (know your participants), with the site (capacity, venue conditions and timing) and with the programming (reflecting your vision/mission).
THE VISION STATEMENT DEFINES YOUR ULTIMATE GOAL.

For example:

- The Oakridge Agri-fair will be recognized as one of the finest producers of a locally operated agricultural event in the province that highlights the achievements of youth and nurtures their skills, talents and creativity in the maintenance and growth of the agricultural community.

WHAT ARE YOUR GOALS?

What do you hope to achieve? For example, do you want to be the best agricultural fair in the county? Do you want to support the health and wellness of youth by organizing a sporting event?

WHY ARE YOU PLANNING A FESTIVAL/EVENT?

What is your motivation for creating your festival/event? Is there a perceived need or interest in the community for your type of festival/event? Do you see an opportunity to showcase an aspect of your community that isn’t duplicating other festivals/events? Is there a direct economic benefit to the community?

WHAT IS YOUR FESTIVAL’S/EVENT’S ULTIMATE GOAL?

Make a list the things you would like to accomplish for your community. What is the positive impact of these accomplishments? Who will it have an impact on?
THE MISSION STATEMENT IS HOW THE GOAL IS TO BE ACHIEVED.

For example:

- Through interactive activities and displays and through the celebration of achievements, participants and visitors will gain a greater understanding of the value of the youth in our rural community and how they use innovative strategies to strengthen the agricultural community for the future.

QUESTIONS TO ASK YOUR ORGANIZING GROUP WILL BE:

- How will you program?
- Who do you want to participate?
- What values does your festival/event possess?

Developing both a Vision and Mission Statement will be a process the organizing group will engage in to help determine the direction the festival/event is going to take. Time must be spent discussing the value of the festival/event to your participants, stakeholders and the public. What benefit will be gained? What impact on the community is expected or hoped for?

WHAT ARE YOUR STRATEGIES TO CREATE THE ENVIRONMENT THAT WILL ACHIEVE YOUR GOALS?

Part of the evaluation process of the festival/event will be to review your goals and decide if the outcome of the event is what was expected and if this reflects your Vision and Mission. Changes to the Vision and Mission Statements will occur as the festival/event evolves.
CLARIFICATION OF YOUR VISION AND MISSION WILL HELP YOU TO:

- define your ultimate goals and objectives
- identify your purpose
- identify your values
- develop strategies to achieve your objectives

HAVING REVIEWED YOUR GOALS, WRITE YOUR STATEMENTS:

VISION:

MISSION:
B. ESTABLISHING THE ORGANIZATIONAL TEAM

New festivals/events can be comprised of a small committee of people committed to the project. So your first step is to determine how many people you’ll need to organize and run the festival/event and where will you find them?

As your festival/event grows, you may decide to expand your committee and have sub committees to handle things like policies, rules and regulations, finances and decision-making. Generally, a larger festival/event will have a governing body (potentially becoming a not-for-profit organization) that takes the form of a board of directors with committees who will carry out the instructions of the board of directors.

For information regarding the establishment of a not-for-profit society in Alberta see Canada Business Network, service for entrepreneurs, www.canadabusiness.gc.ca and search under nonprofit.

There are a number of different options for organizational structure, but whatever option you choose, agreement on the overall vision and mission is essential to the process of developing a strategic plan for the sustainability and growth of the festival/event.

Inovus, Inc. Strategy Formation and Organization Design, states that organizational design “is a formal, guided process for integrating the people, information and technology of an organization”. (http://www.inovus.com/organiza.htm)

For an in-depth look at committee development see the Free Management Library at http://managementhelp.org/boards/committees.htm
CHOOSING YOUR LEADER AND TEAM

When choosing the people who will take leadership roles for your festival/event, whether you live in a small town, rural community or in a community within a large city, look for people who have experience, energy and enthusiasm for the project. Below is a checklist of attributes you may want to consider when choosing your team:

PERSONAL QUALITIES:

• has strong leadership qualities
• will be committed to the vision and mission of the festival/event
• will act in the best interests of the festival/event
• will be a good ambassador for the festival/event
• works well with a team
• has good communication skills

BACKGROUND/SKILLS:

• has previous committee experience
• volunteer experience
• previous festival/event organization experience
• has experience related to the roles and functions of the event e.g. music, sports, sponsorship development, accounting, etc.

Whether you become a not-for-profit organization with a board of directors or a standing committee with sub-committees, it’s important to develop a plan of action for the governing group and every member.

The Board Development Program through Alberta Culture and Tourism provides assistance to boards/committees through workshops, consultations, resources and special presentations. A brief description of the four main committee/board roles is found on the next page. As a general rule, you’ll need at least another four members to help with the organizational management of your festival/event.

For further information on board governance and consultation visit the Alberta Culture and Tourism website at http://culture.alberta.ca/community/programs-and-services/board-development/
KEY ORGANIZATIONAL COMMITTEE MEMBERS

1. The Chair guides the members through:
   - policymaking
   - strategic planning
   - decision-making
   - service on all committees (if required)
   - compliance to all laws
   - help with the planning of agendas and meetings
   - providing direction at meetings to keep discussion on track and within the time line of the meeting
   - reviewing all pertinent information and reports
   - providing guidance for the succession of the membership
   - keeping the mission and vision at the forefront of programming discussions

2. The Vice-Chair will take charge of the duties of the board chair when he/she is not available, and helps with the development of the instructions for operation of the directors.

3. The Secretary maintains records of all meetings and reporting and delivers the meeting minutes to all members of the committee in a timely fashion.

4. The Treasurer reports on the financial status of the organization.

IT IS CRITICAL THAT AN INDIVIDUAL IS IDENTIFIED TO BE THE CHAIR OF THE FESTIVAL/EVENT AND THAT THEY’RE PREPARED TO ASSUME THE ROLE AND ITS RESPONSIBILITIES. IF YOUR CHAMPION IS NOT DETAILS-ORIENTED OR IS NOT A STRONG LEADER, IT’S BETTER TO APPOINT SOMEONE WHO IS. FIND ANOTHER MORE SUITABLE POSITION FOR THE CHAMPION.
FUNCTIONAL COMPONENTS OF FESTIVAL/EVENT PLANNING

There are eight key functions that need to be addressed in any festival/event. Smaller events may have committee members handling more than one function, e.g. fundraising and sponsorship, but as the festival/event grows each function will require a coordinator. PART 2 of this manual provides more details and outlines responsibilities for each of these functions as well as providing planning tools and useful templates.

a. Overall Management of the Festival/Event – Typically in new or developing festivals/events, the Chair or the Champion takes responsibility for overseeing all functions to ensure success. This individual will be responsible for keeping the Coordinators/Committee Chairs accountable, on target and on schedule. It is this person’s responsibility to ensure that everyone understands the vision and mission and that they are working towards a common goal. This person is also charged with keeping the master schedule for the festival/event.

In addition to the Chair, the Vice Chair, Secretary and Treasurer round out the group that manages the overall event. Should a festival/event develop to the point where a Manager is hired, the Manager would assume this responsibility and be accountable to the committee/board.

b. Financial Management is a very important role and the task of looking after the finances of the festival/event is the Treasurer’s job. Larger festivals and events may wish to consider hiring an accountant or book-keeper to handle financial records as it can become a major task for a volunteer Treasurer. Other tasks under financial management may include handling the insurance, payroll, invoices and payment for contractor(s), supplier(s) and performer(s), gate and box office revenue collection, as well as invoicing and collection of vendor fees.
c. Fundraising – New festivals/events may want to do some pre-event fundraising to provide operating revenue during the planning stage. For those operating for several years, fundraising through the year may be a lucrative means to supplement revenue or balance the budget if other funding sources don’t meet the financial requirements to run the festival/event.

There are different forms of fundraising. It can include researching and applying for grants, obtaining corporate sponsorship or undertaking specific fundraising activities and events such as raffles and auctions or hosting dances or performances.

Funding organizations or private businesses will want to know what plans are in place to develop and maintain financial sustainability. Private foundations and government granting agencies as well as private donors often have a limit on how long they will support a festival/event. It’s not wise to rely on government or foundation money as the only source of revenue and the goal should be to be able to operate without them in the long term. Self-sustaining is a term they like to hear.

Sponsorship – Sponsorship can be an effective fundraising technique. Depending on the size and scale of sponsorship you may want to have separate fundraising and sponsorship committees.

Your Organizing Committee can aid the Sponsorship Coordinator by suggesting potential sponsors from the community and provide guidance regarding the components of the festival/event to be stressed. The person in charge of this area will be developing a potential sponsor/donor list, letter of invitation, levels of sponsorship including benefits and recognition and creating some form of gratitude for sponsor/donor participation.

d. Media/Promotion – The Organizing Committee should provide direction on how to promote the festival/event and messaging surrounding it. Try to find a volunteer who is skilled and experienced with producing promotional materials and dealing with the media for this coordination position.

LOCAL NEWSPAPERS MAY PROVIDE FREE ADS IF THEY FEEL THE FESTIVAL/EVENT IS CONTRIBUTING TO THE WELL BEING OF THE COMMUNITY. RADIO STATIONS ALSO PROVIDE PUBLIC NOTIFICATION OF EVENTS. IT IS ALSO IMPORTANT TO ENSURE YOUR FESTIVAL/EVENT IS LISTED ON THE FREE TRAVEL ALBERTA TOURISM INFORMATION SYSTEM (ATIS) AS WELL AS YOUR LOCAL MUNICIPAL WEBSITE.

e. Entertainment and Activities – This function may be divided into two areas of responsibility. A Program function and a Vendor function.

For the Program function, the Organizing Committee should give some direction on what elements will make up the festival/event, or they may appoint the responsible Coordinator/Sub-committee to plan, initiate and implement the programming. Programming includes performances, activities, guest speakers or emcees, contracts, décor for site and any other props or materials.
If it is decided to have a vendor component to the festival/event e.g. food stands, craft stands, etc. this function could be the responsibility of the Entertainment and Activities Committee Chair or could become a separate function or committee. Recruitment of vendors, establishing the guidelines and regulations and assisting with move in and move out schedules of vendors are areas of responsibility for this function.

f. Production/Logistics – The job of overseeing the physical site has a number of different components that may require specialized skills including:

- technical knowledge of such things as soundboards, audio/visual equipment, screens etc. Power requirements and access
- sewage access
- venue regulations
- map production
- conducting a risk assessment on the site that includes, potential hazards to health and safety
- parking considerations
- audience flow
- venue suitability
- security
- first-aid
- emergency procedures and egress
- producing a contingency plan in the event external factors prevent the festival/event from continuing on the site

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g. Volunteers – Choosing people to fill the required needs of the festival is composed of developing a volunteer program that includes:

- job descriptions
- recruitment
- screening
- interviewing
- orientation
- training
- supervision
- recognition

Due diligence refers to the action taken to minimize risk within the volunteer program through screening, placement, insurance, police checks etc. For more information see Volunteer Alberta at http://volunteeralberta.ab.ca/services/information-center.guides/
AS A GENERAL RULE YOU CAN NOT HAVE TOO MANY VOLUNTEERS. COMMITTEE MEMBERS WILL OFTEN VOLUNTEER TO BE RESPONSIBLE FOR DIFFERENT TASKS AND ON THE DAY OF THE FESTIVAL/EVENT THEY FIND THEMSELVES SPREAD TOO THIN. THE RESULT BEING SOME THINGS DON’T GET DONE OR MANY THINGS DON’T GET DONE WELL.

Choosing a good team empowers the organization with the best possible potential for success. Having a team that agrees to the objectives and goals, and is willing and able to see the process through will foster:

- Collaboration
- Creative thinking
- Positive discussion and debate
- Informative communication
- Support and encouragement

OTHER COMMUNITY RESOURCES:

Start up festivals/events may wish to align with partners who are able to provide administrative support and possibly even staff. The Town or municipality may be willing to provide meeting space, photocopying services and commit time from the recreation staff for example. Your event may have some natural ties with a not-for-profit organization/community group e.g. Kinsmen, Historical Society or church that may also be able to provide resources.
C. PLANNING AND LOGISTICS

WHAT DO WE NEED TO MAKE THIS FESTIVAL/EVENT HAPPEN?

Knowing the who, what, when, where, why and how of the festival/event will help you to establish its main components such as:

- finances, logistics, resources, venue, media, sponsorship, volunteers and staff resources you require and what the cost will be.

DEFINE YOUR AUDIENCE AND PARTICIPANTS

To determine what audience you would like, review what your festival/event is going to be and what you want to achieve. Is this audience in your community or is it regional or Provincial? Are they a wide-range of people or a specific group? Do you want to keep the festival/event local? Are you planning for the festival/event to get bigger each year expanding beyond your immediate community?

Make a list of all potential groups or segments of the population you would like to attract to your event (e.g. families, teens, seniors, sports groups, performing arts groups, etc.).

Carefully defining your target audience helps you determine where to promote and what programs are needed to attract them. It also helps to estimate the number of participants.
ESTABLISH THE DATE

When setting the date for your festival/event, pay careful attention to the time of year, competition from other community activities and your target audience. Research your community calendar for conflicts and options and choose a date that best suits your festival/event. If another festival/event is happening at the same time as yours, research the opportunities for another date or perhaps explore the possibility of a joint venture.

For example, your festival is featuring local country music talent and you find out that another event is having a fund-raising music competition at the same time. Explore ways to combine the two events to the mutual satisfaction of both parties.

Having an event during special holidays could mean your audience is distracted or out of the community. While a winter celebration can be very successful, you need to think about things like alternative venues and activities if bad weather threatens outdoor events.

DEVELOP AND MAXIMIZE YOUR THEME

Your festival or event will have a theme whether it’s sports-based (soccer tournament), a cultural festival (Métis Days) or related to a holiday celebration (Canada Day). Your theme is used to package your festival/event and everything in the package should be related in some way to the festival/event theme.

The goal is to consistently communicate your theme in everything you do. It should be considered and used in: your festival/event title, your programs and activities, types of foods served, displays, music, decorations, uniforms and the design of your signage and promotional material.
Maximizing your theme should be a fun and creative process. Think of fun and wacky ideas that will build on the theme; for example an ice cream festival might have an ice cream sculpture contest or an ice cream pie toss; a corn festival could include food products such as corn fritters, corn soup and corn dogs and a craft could include making corn husk dolls.

Your Festival/Event Name:

What programs or activities can be added that are fun and wacky and build on the theme?

AS YOU PLAN THE PROGRAMS AND ACTIVITIES FOR YOUR FESTIVAL/EVENT, SPECIAL INTEREST GROUPS MAY OFFER TO PROVIDE DISPLAYS OR PERFORMANCES THAT DON’T CONTRIBUTE TO THE THEME. THEY MAY IN FACT DILUTE YOUR THEME SO THE TOTAL EFFECT OF THE EXPERIENCE IS LOST ON YOUR AUDIENCE. CAREFULLY ASSESS THE VALUE OF SUCH OFFERS BEFORE COMMITTING TO THEM.

GREENING YOUR FESTIVAL OR EVENT

What is a Green Festival or Event? According to the Icarus Foundation (2009), a green festival or event incorporates environmental considerations to minimize its negative impacts on the environment including reduction of waste, water, energy and the utilization of local food and products, etc.

There is a lot for your community to gain by going green and it doesn’t have to be difficult. Here are just a few resources to help you get started:

http://www.greenfestivals.org/
http://www.agreenerfestival.com/
http://greenfestivals.ca
http://www.bathurstsustainabledevelopment.com/
DETERMINE THE LOCATION

Where you hold your festival/event is a crucial component of the planning process and directly affects its success. Look at the requirements of all the programs and activities planned and determine their needs and requirements.

a) Is there plenty of space for the performances, activities, vendors and participants? (Adequate space needs to be provided for people to demonstrate and/or provide materials for an activity as well as space for participation. For safety reasons, pedestrian access cannot be impeded in any way. If there are performances on spaces other than a stage, there needs to be an adequate amount of room for equipment and performers.)
   - YES  - NO

b) Are there adequate facilities such as power, lighting, water, bathrooms and parking? (Established venues will already have complied with regulations regarding facility requirements. Review your set-up with the proper authorities.)
   - YES  - NO

For clarification on health and safety issues, fire safety standards and capacity, see albertahealthservices.ca; the Alberta Liquor and Gaming Commission at http://www.aglc.gov.ab.ca/liquor/default.asp; and your local fire department.

c) Is it accessible to all visitors? (Are there ramps for wheelchair access? Are there stairs to climb that may make it difficult for the elderly or dangerous for toddlers? Is it well lit?)
   - YES  - NO

d) Are there clear emergency exits? (For the best possible answer, have a representative from the fire department check your facility. All exits must be clearly marked, emergency lighting available in case of power failure and adequate aisle width must be provided for easy movement past seated guests.)
   - YES  - NO

e) Does the venue have current fire certification, fire extinguishers and alarms?
   - YES  - NO

f) Is there sufficient backstage space and loading areas? (You’ll need to provide adequate space for performers, stagehands, volunteers and equipment between shows. Do you need dressing rooms? Where is the lighting and sound booth going to be located?)
   - YES  - NO

g) Does the venue suit the programming? (An arena is suitable for a sporting event, market or a large concert but it will probably be too large for an acoustic duo or a magic show.)
   - YES  - NO
IF YOU CHOOSE AN OUTDOOR SITE WITH MULTIPLE VENUES, THE PROCESS OF SELECTION BECOMES MORE COMPLEX. FILL IN YOUR ANSWERS TO THE FOLLOWING QUESTIONS:

h) Are there a variety of spaces that could be transformed into a venue? (Can you make use of a park, parking lot, sports field, vacant lot or school? Or a combination?)

i) How cohesive is the site? (Is your site unified so visitors don’t have to travel too far to each venue?)

j) Are there buildings or businesses that could be adapted into venues? (Some options include a church for musical presentations, a library for story telling and a historical building for displays or activities, etc.)

k) What are the site conditions like? (Is it a manicured lawn, a field or pavement? What will the area be like in rain?)
l) Is there a natural performance space with good sight lines for the audience? (Are there natural amphitheatres?)

m) Is there good pedestrian access and flow? (Does your audience have to cross streets to get to a venue? Is there plenty of room for people to move around without interrupting sight lines or causing bottleneck situations?)

n) Is there plenty of parking and access to public transit? (Can everyone park around the site or will you have to designate parking areas away from the site? Is it easy to access? How much signage will you need?)

o) Are there any safety issues with the overall site? (Is it easy for security to monitor? Do emergency vehicles have egress points?)
D. DEVELOPING A BUDGET

The sample budget items below will give you an idea where you can obtain funding and different sources of revenue. It will also help you identify what expenses you may incur. Also think about what items you can borrow and who might sponsor or donate needed materials or other resources.

Using the list below and including any other costs you can think of, create a potential budget. For grant purposes it’s a good idea to keep a record and set a value for in-kind donations. A more detailed budget itemization is provided in PART 3 Tools and Templates.

### PLANNING FOR BUDGET REVENUES AND EXPENDITURE AREAS

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<td></td>
<td></td>
</tr>
<tr>
<td>Promotional Costs</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Licenses/Permits</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Insurance</td>
<td></td>
<td></td>
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<td></td>
</tr>
<tr>
<td>Signage</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Printing</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
E. CREATING A FESTIVAL/EVENT SCHEDULE

The next step in the process is to begin preparing a festival/event timeline that sets out the timeframe for action. Some organizers call this a Master Schedule.

THE BENEFITS OF EFFECTIVE SCHEDULING INCLUDE:

- Avoiding problems by having the information recorded regarding due dates and deadlines
- Having all the information you need at hand by establishing set meetings, reporting and minutes to track progress, identify issues early and determine the actions needed
- Possessing a complete directory of all pertinent personnel
- Determining the number of volunteers you will need based on the number of tasks
- Establishing the resources needed to operate the event
- Having better control over the outcomes by seeing how well different programs and activities fit together
- Experience a sense of accomplishment as tasks are completed

Each of your area coordinators should create their own timeline, such as Production, Entertainment, Vendor and Sponsorship that includes a schedule of all their critical dates and times for the programming, activities, site installations etc., dates and times for meetings, orientations, load in and out times. The Festival/Event managing committee and/or the Festival/Event Director/Coordinator can add this information to the Master Schedule for use helping to clarify the most critical elements.

<table>
<thead>
<tr>
<th>TIME/DATE</th>
<th>ACTION</th>
<th>COMPLETION/NOTES</th>
</tr>
</thead>
<tbody>
<tr>
<td>14 months out</td>
<td>Talk with people in community to determine if idea is viable; meet with interested individuals to discuss options; develop organization; set date for strategic planning</td>
<td>Established a planning group from a variety of sources.</td>
</tr>
<tr>
<td>12 months out</td>
<td>Set meeting dates; Develop roles and responsibilities for areas; Set budget</td>
<td>Need to go beyond immediate community for financial assistance</td>
</tr>
<tr>
<td>10 months out</td>
<td>Confirm site and venues Begin needs assessments</td>
<td>Park has been chosen for main site. The library, church and arena are booked.</td>
</tr>
<tr>
<td>8 months out</td>
<td>Begin booking entertainment, special guests, emcees</td>
<td>Aboriginal dancers are booked. Hearing back from others soon.</td>
</tr>
<tr>
<td>6 months out</td>
<td>Develop vendor program</td>
<td>Committee set to jury craft submissions and food menus.</td>
</tr>
</tbody>
</table>
The schedule allows you to see and meet deadlines in an organized and effective manner because:

- Grants need to be approved by foundations or government agencies
- Sponsorship and media packages require research and preparation to the specific requirements of corporations and businesses
- Suppliers must be determined
- Equipment and materials must be ordered
- Volunteers need to be recruited, placed and trained
- Entertainment must be organized
- Invitations to invited guests need to be sent and contracts must be signed and returned
F. FUNDING

Funding is often the most difficult aspect of a festival/event. A start-up festival/event needs operating funds to do the organizing. For example, you may need to put down deposits for the venue and equipment rentals. There is always uncertainty about the number of people who will attend and the revenue generated.

There are several different forms of fundraising. There are federal and provincial grants. Municipalities will sometimes provide grants for community events and there are also foundations that provide funding if the festival/event contributes to their mandate.

Corporate sponsorship is also a very effective way of raising funds. Strategies for obtaining corporate sponsorship are found in PART 2 in the Sponsorship/Fundraising Coordinator module. Smaller scale fundraisers can also be considered, such as raffles, auctions or fund raising dances, performances and sporting events.
Some potential grant programs:

- **Canadian Heritage** - Building Communities through Arts and Heritage. This program provides three levels of funding – Local Festivals, Community Anniversaries, and the Legacy Fund. Information regarding these grants can be found at [http://www.pch.gc.ca/eng/1267799042836](http://www.pch.gc.ca/eng/1267799042836).

- **Canada Council for the Arts** - Dance Presentation Program: Support to Festivals. This program helps Canadian non-profit festivals to showcase professional dance within their overall festival programming. More information can be found by visiting [www.canadacouncil.ca](http://www.canadacouncil.ca).

- **Alberta Culture and Tourism** - Community Initiatives Program. This program supports project based initiatives including arts and culture, sports, education and health and recreation. To learn more about this program visit [http://culture.alberta.ca/community/community-grants/community-initiatives-program/](http://culture.alberta.ca/community/community-grants/community-initiatives-program/).

- **Alberta Culture and Tourism** - Other Initiatives Program. This program is intended to support worthy Alberta projects that cannot be funded under the criteria for other Alberta Lottery Fund Grant programs. Information regarding this grant can be found at [http://culture.alberta.ca/community/community-grants/other-initiatives-program/](http://culture.alberta.ca/community/community-grants/other-initiatives-program/).

Other government agencies and ministries often entertain asks for funding on a case by case basis.

**IT IS IMPORTANT TO NOTE THIS IS NOT AN EXHAUSTIVE LIST. APPLYING FOR FUNDING WILL DEPEND ON MANY DIFFERENT ELEMENTS OF YOUR ORGANIZATION AND ADDITIONAL RESEARCH SHOULD BE DONE TO FIND OTHER PROGRAMS OR MEANS OF ATTAINING FUNDING. IT’S IMPORTANT TO THINK ABOUT THE UNIQUE ASPECTS OF YOUR FESTIVAL/EVENT WHEN RESEARCHING FUNDING. OFTEN TEAMING UP WITH OTHER EXISTING ORGANIZATIONS (I.E., HISTORICAL SOCIETIES) CAN IMPROVE YOUR CHANCES OF BEING SUCCESSFUL. ALL GRANT AND FUNDING PROGRAMS ARE SUBJECT TO CHANGE AND/OR CANCELLATION AND THE USER IS ENCOURAGED TO RESEARCH ALL FUNDING AVENUES THOROUGHLY.**
G. EVALUATION

How do you plan to measure your success? Evaluation is an ongoing process and an organization should take some time to look at itself internally as well as looking at the external components of the actual festival/event.

Some reasons for evaluation are to:

1. Determine if you have reached your objectives
2. Measure the success of the components of the festival/event
3. Review the process from beginning to end
4. Identify the strengths and weaknesses of the festival/event
5. Identify the strengths and weaknesses of the team
6. Assess the accuracy of the area budgets
7. Be accountable to the festival/event organization, stakeholders, sponsors, volunteers, participants and funders
8. Determine where there are future community opportunities

The first step in evaluation is asking:

1. What do we want to evaluate?
2. When will evaluation take place and where?
3. Who will perform the evaluation?
4. How will we evaluate?

---

1 A good site online for obtaining guidance for evaluating your festival/event is at Alberta Culture and Tourism Board Development Program, [http://culture.alberta.ca/community/programs-and-services/board-development/](http://culture.alberta.ca/community/programs-and-services/board-development/); All the board development, consultation and workshops for nonprofit organizations offered through the Government of Alberta are free of charge.
There are two types of evaluation you should employ and both can be used from the beginning of the process to monitor how the festival/event is progressing and where there may be issues\(^2\).

- **Qualitative measurement** gathers data to sum up the outcomes of the participants’ experience using written or online audience surveys, asking participants direct questions on-site, video-taping aspects of the programming and getting feedback from volunteers, sponsors, suppliers and performers.

- **Quantitative measurement** compiles of hard data from such sources as, ticket sales, merchandise sales, venue admissions, vendor fees, budget figures and audience attendance counts.

One of the most effective methods to obtain **quantitative** data from every area of the festival is to have each committee coordinator fill in an Assessment Record.\(^3\) From this information you can learn how many people attended the performances and activities, how many people represented your target audience, what the cost of the program was, how much sponsorship was attained and total up your volunteer and staff hours.

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\(^2\) Throughout the process of festival/event planning, organization and implementation “Performance Indicators” gauge how well you are progressing towards your goal, what achievements have been reached, and where you need to put more effort. See [http://managementhelp.org/evaluation/outcomes-evaluation-guide.htm](http://managementhelp.org/evaluation/outcomes-evaluation-guide.htm)

\(^3\) The format and text for this Assessment Record is a modified version of a topic from the Centre For Health Promotion through the Minnesota Department of Health, [http://www.health.state.mn.us/divs/hpcc/chp/hpkit/text/eval_why.htm](http://www.health.state.mn.us/divs/hpcc/chp/hpkit/text/eval_why.htm)
USE THIS FORM TO SUMMARIZE YOUR RESULTS FOR PART ONE

Name of Event: _____________________________________________________________

Date of Event: ____________________________________________________________

Vision Statement: __________________________________________________________

________________________________________________________________________

Mission Statement: _________________________________________________________

________________________________________________________________________

Organizational Structure (including committees): ________________________________

________________________________________________________________________

Roles and Responsibilities: _________________________________________________

________________________________________________________________________

Critical Dates and deadlines: ________________________________________________

________________________________________________________________________

Target Audience/Participants: ________________________________________________

________________________________________________________________________

Location of site and venues: _________________________________________________

________________________________________________________________________
USEFUL RESOURCES FOR PART ONE

ESTABLISHING A NONPROFIT ORGANIZATION
I. Canada Business Network, service for entrepreneurs, www.canadabusiness.ca

BOARD/COMMITTEE DEVELOPMENT, ROLES & RESPONSIBILITIES

STRATEGIC PLANNING

EVALUATION

HEALTH AND SAFETY RULES AND REGULATIONS
IX. Alberta Capital Health, www.albertahealthservices.ca
TOOLS FOR INDIVIDUAL COORDINATORS

A. OVERALL MANAGEMENT/CHAIR
B. SPONSORSHIP/FUNDRAISING
C. MEDIA RELATIONS/PROMOTIONS
D. ENTERTAINMENT AND ACTIVITIES
E. VENDOR
F. PRODUCTION/LOGISTICS
G. VOLUNTEERS
INTRODUCTION
This section is meant to assist each committee coordinator by providing role clarification, tools and tips about the various stages and processes that go into planning, executing and evaluating a festival or event.

Each role-specific section can be used as a stand alone piece and be given to the appropriate person responsible for that function.
CHAMPION OR CHAIR

OVERALL MANAGEMENT OF EVENT

The overall management of the festival or event usually takes form in a Champion or Chair. This person oversees all aspects of planning, organizing, funding, operations on the day and final evaluation.

He or she will work with and lead the rest of the committee members and coordinators to ensure that gaps are identified, errors are corrected and all aspects of the event are being considered. The Champion/Chair is often someone who has conceived the idea or has the time and resources to bring the idea to life.

Selecting the Champion or Chair to oversee the process of planning and executing a festival and event is extremely important. This person must be able to provide direction and support to the rest of the committee.

A CHAMPION/CHAIR IDEALLY SHOULD:

• be a good leader
• have the ability to develop a strong, trusting relationship with the team and the community
• be clear on the goals and objectives of the festival/event
• possess the ability to manage the legal, governing and regulatory requirements of the festival/event
• have the experience and ability to delegate necessary responsibilities to the team
• have strong planning and organizational skills
• have the ability to allocate resources in an effective manner
• have leadership experience including the ability to inspire communication, creativity and dedication to the festival/event

As the festival/event grows and develops, the organization may be in the position to hire a Festival/Event Director. In start up and smaller festivals and events the Chair takes on the role and responsibility of the Director.
RESPONSIBILITIES

- **Planning and Organization**: Comprises the ability to guide in the selection of committee members and coordinators and volunteer needs; helps establish the program and activities; assists in the development of the site and venue selection; develops an assessment of resources and where they may be obtained; contributes to the development of the sponsorship and media packages and incorporates this information into a schedule.

- **Chairing Meetings**: One of the most important day-to-day functions of the Champion/Chair is to schedule, chair and document all meetings. This includes finding meeting space that is agreeable for the committee members, communicating date and time, setting the agenda, keeping the meeting on task and ensuring meeting minutes are taken and sent out to all committee members in a timely fashion.

- **Resource Allocation**: Helps the committee coordinators assign funds, human resources, equipment and materials throughout the different areas. Monitors budget expenditures and revenue flow.

- **Assistance to all Areas**: While some areas may need more help than others, it is important that the Chair understands the process that every area is going through, at what point in that process they are at and when and what, if any, needs must be met. This can be attained by having all of the committee coordinators present an update at each committee meeting. This will also help other committee members understand how everything ties together and perhaps highlight any areas that they might have overlooked.

- **Evaluation process**: provides tools to help assess success from an organizational standpoint, to the management and stability of the festival/event.

*PART ONE CONTAINS STEP BY STEP INFORMATION ON HOW TO BEGIN ORGANIZING YOUR TEAM, DEVELOPING YOUR EVENT’S THEME, ASSIGNING DUTIES, ETC., AND SHOULD BE REFERRED TO THROUGHOUT THE PLANNING PROCESS.*
CHAMPION/CHAIR’S PRE-FESTIVAL/EVENT CHECKLIST

❑ Who is the spokesperson for the organization? Are there other committee members that will speak on behalf of the festival/event or about their role in the festival/event? For example, the Champion/Chair may be the go to person for information regarding programming and personnel, whereas the Media or Sponsorship Coordinator may provide greetings and thank the sponsors and all participants of the festival/event.

❑ Are preparations ready for the press conference? Are the venues, equipment, program information, press kits, catering and host organized for the festival/event? Have all media and guests been informed and RSVPs confirmed?

❑ Are preparations in place for the VIP reception?

❑ Has a contact list for all festival/event committee coordinators and essential services people been produced?

❑ Are the committee and committee coordinators clear on who is in charge of each venue and what the protocol and procedures are for any production or emergency issues?

❑ Are the festival/event insurance documents in place for overall liability of the site, performers, transportation, the public and vendors?

❑ Have arrangements been made with the financial manager regarding the handling of box office revenues, cash floats, bank deposits and reconciliation?

❑ Have you scheduled the pre-festival/event final meetings for all staff to review the festival/event schedule and any last minute adjustments?

❑ Have you developed a process for collecting qualitative and quantitative data for measuring the success of the festival/event including what information you want to collect, who will do the collecting, how it will be collected, when it will be collected and how it will be reported?

❑ Have you set a wrap meeting and created a final template for a report document for the coordinators to complete post-festival/event?
USEFUL RESOURCES
Roles and Responsibilities


II. Darryl Scotti, How To Choose A Great Producer, www.corporateeventchannel.com/how_to_choose_a_great_event_prod.htm

III. Free Management Library, http://managementhelp.org/boards/index.htm#anchor579041


VII. Volunteer Alberta, http://www.volunteeralberta.ab.ca/


IX. Alberta Health Services, www.albertahealthservices.ca


XI. The Gannt Chart, You Tube, http://ca.youtube.com/watch?v=CW_wGSFavTc&gl=CA
SPONSORSHIP/FUNDRAISING COORDINATOR

Fundraising and sponsorship is one of the most important elements of any successful festival or event. Building strong relationships and mutually beneficial partnerships is going to help to ensure your festival/event achieves sustainability from year to year.

Fundraising and sponsorship coordination involves the cultivation, care and maintenance of a relationship between the festival/event and the donor/sponsor(s). Donors/sponsors could be an individual, corporation, foundation or business. Based on the budgetary projections, the Coordinator should have a good indication of the funds and in-kind donations required to operate the festival/event.

A Sponsorship/Fundraising Coordinator should:

- know the business and corporate community well
- be familiar with the types of giving this sector of the community engages in
- be able to articulate the objectives of the festival/event to funders and granting organizations
- be able to determine appropriate recognition

Managing the overall sponsorship program includes:

- researching the community for potential donors and creating a donor database
- writing a letter of invitation to sponsors, researching the criteria (if any) for donation requests (foundations and corporations have clear mandates for giving)
- establishing recognition for sponsorship, arranging a thank you reception or letter of gratitude
- assessing the success of the sponsorship program
PLANNING THE STRATEGY FOR DONATION REQUESTS REQUIRES YOU TO THINK ABOUT THE FOLLOWING:

1. Do you know people in the community who can help with funding, equipment, materials, in-kind contributions, etc.? Are there private citizens who are philanthropic? Would your local rental outlet and/or printing shop provide equipment and materials free or at a reduced cost?

2. Is the business community interested in improving the quality of life of your citizens through sponsorship and active participation in events in your community? List the businesses that you think might be willing to contribute to the festival/event.

3. Are there clubs, organizations or associations that share your vision and mission? Who are they and why would they be a good fit with your festival/event?

4. Do your civic leaders support community events? Will the Mayor/Councilors help you with ideas, information, resources, etc.? How can they be of assistance?

5. Who are the arts supporters in your community? Do you have a theatre group, reading club, painters’ association or a school drama club that could contribute to your festival/event? How?
6. What benefits and recognition such as website advertising, name recognition on advertising materials, site signage, etc., can you provide to attract sponsors and donors?

7. How many other events are competing for volunteers, funding, materials and equipment in your community? How will you resolve this issue?
CREATING A PLAN

Organizing a sponsorship plan entails:

- Ensuring you have an up to date and realistic summation of sponsorship needs from committee coordinators
- Setting dates for meetings with potential donors
- Putting everything on a schedule
- Keeping track of letters, phone calls and emails
- Returning communications upon request
- Working with the Media Relations/Promotions Coordinator to make sure sponsor recognition in the media
- Sending invitations to VIPs and special guests
- Checking all festival/event material and messaging for inclusion of sponsors
- Ensuring that sponsors are be cared for pre, during and post festival/event
- Thank-you letters
- Ensuring all eligible sponsors receive a donation receipt

Before going forward to potential donors review your sponsorship package and your presentation:

- Do I have all the information about the organization?
- Do I have a good understanding of how the organization will fit the overall vision for the festival/event?
- Are all the details concerning the programming accurate and complete?
- Do I know what benefits and recognition I can offer and can I be flexible?
- Do I have financial information if asked? (Be prepared to provide festival/event budgeting figures and where their money is going.)
- Am I confident in my understanding of the vision and mission of the festival/event?
- Do I have an opportunity to develop a partnership with this sponsor over several years?
USE THIS SAMPLE CHART OF POSSIBLE DONORS TO CREATE YOUR OWN TEMPLATE.

<table>
<thead>
<tr>
<th>POTENTIAL DONOR</th>
<th>CONTACT INFO</th>
<th>CASH CONTRIBUTION</th>
<th>IN-KIND VALUE DONATION</th>
<th>VENUE</th>
<th>NOTES</th>
</tr>
</thead>
<tbody>
<tr>
<td>MAIN BANK</td>
<td>John Banker Manager</td>
<td>$2,000.00</td>
<td></td>
<td>Parade</td>
<td>Flags to be bought and given away at bank; need logo for advertising.</td>
</tr>
<tr>
<td>1st Main St., Anytown, AB</td>
<td>Phone: Email:</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>T6X 4C2</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>MAIN GROCERY 2nd St.,</td>
<td>Julia Chambers Manager</td>
<td>$1,000.00</td>
<td>Fruit platters for</td>
<td>Fruit platters for green room volunteer centre, and food for VIP reception.</td>
<td></td>
</tr>
<tr>
<td>Anytown, AB T6X 4C2</td>
<td>Phone: Email: Fax:</td>
<td></td>
<td>VIP reception.</td>
<td></td>
<td>Keep receipts for accountant; need logo for advertising.</td>
</tr>
<tr>
<td>HISTORICAL SOCIETY 3rd St.,</td>
<td>Wallace History Chair</td>
<td>$2,500.00</td>
<td></td>
<td>Museum lobby</td>
<td>Need to get picture displays framed.</td>
</tr>
<tr>
<td>Anytown, AB T6X 4C2</td>
<td>Phone: Email:</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>LIBRARY</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>HARDWARE STORE</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>LOCAL CLUBS/ORGANIZATIONS</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>INDIVIDUALS</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>PROVINCE</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>OTHER GRANTING ORGANIZATIONS</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
REQUEST LETTERS

Letters to donors may be general, but if a pre-existing relationship exists or the time is available, every effort to customize each letter should be made. Focus on components of the festival/event that align well with a potential donor. Whoever the donor, all letters should contain the following:

- A description of your organization
- The Vision and Mission Statement
- Your target audience
- Programming and activities
- Desired outcomes
- Contribution being requested (dollar amount, equipment, services, materials, etc.)
- The benefits and recognition the donor will receive
- A statement of the funding or in-kind contributions you have already acquired
- Detailed list of all recognition levels

Developing levels of recognition will also be part of the package. The size of the budget for sponsor development will determine what you can offer. Set your levels at achievable limits. For example, you may want to offer:

- Recognition in promotional material leading up to the festival/event
- Advertisement for an individual performance or activity
- Acknowledgement in program (various levels)
- On site signage
- Website link
- Charitable donation receipt

IF RESOURCES ARE SCARCE OR STRETCHED THIN AS A RESULT OF COMPETITION IN THE COMMUNITY, THINK OUTSIDE THE BOX. TRY TO BE CREATIVE WITH YOUR SPONSORSHIP OPPORTUNITIES FOR EXAMPLE:

- CONSIDER HAVING LOCAL BUSINESSES ADOPT A VENUE TO HELP OFFSET COSTS AND ALLOW THEM TO OWN THE SHOW THROUGH NAME RECOGNITION ON THE VENUE
- GET SCHOOLS INVOLVED BY HAVING THEM CREATE AND RUN ONE OF THE PROGRAMS OR PERFORMANCES
SAMPLE LEVELS OF RECOGNITION

PLATINUM
$8,000 - $10,000
Signature sponsor status (website, media, all marketing materials)
Acknowledgement at the Media Conference/ opening ceremony
Acknowledgement throughout the festival/event
Seating for 8 at VIP reception
Prominent logo display in program
Website link
Charitable donation receipt

GOLD
$5,000 - $7,500
Naming rights to 2 specific program items
Acknowledgement at media conference
Acknowledgement throughout the festival/event
Prominent logo display in program
Charitable donation receipt

SILVER
$3,000 - $4,500
Naming rights to 1 specific program item
Acknowledgement in program
Acknowledgement throughout festival/event
Charitable donation receipt

BRONZE
$1,000 - $2,500
Acknowledgement throughout festival/event
Acknowledgement in program
Charitable donation receipt

WHILE IT IS ALWAYS DESIRABLE TO SIGN SPONSORS TO MULTI-YEAR DEALS, BE CAREFUL YOU CAN DELIVER ON THEIR EXPECTATIONS. ALLOWING EXCLUSIVITY TO A SPONSOR HAS BOTH BENEFITS AND DRAWBACKS. BENEFITS TO CONSIDER MAY INCLUDE A LARGE CASH INPUT INTO THE FESTIVAL/EVENT, BUT THE DRAWBACK MAY BE THAT YOU CAN'T HAVE ANY COMPETING VENDORS ON THE SITE. FOR EXAMPLE, THE PIZZA VENDOR WANTS EXCLUSIVITY FOR WHICH HE WILL PAY X AMOUNT FOR SPONSORSHIP, BUT YOU'RE NOT ALLOWED TO HAVE ANY OTHER FOOD OR BEVERAGE VENDORS ON SITE OR IN YOUR PROMOTIONAL MATERIALS. YOU’LL NEED TO CAREFULLY WEIGH THE PROS AND CONS OF THIS TYPE OF ARRANGEMENT.
BUDGETING AND RESOURCES

Allocating the resources you’ll require will be established as each area of the festival/event completes its Needs Assessment. (A template for this is provided in PART 3.)

As time goes on, you may find you need more money or supplies than you originally thought. These requests should be brought to the Committee to be examined and prioritized. Decisions may need to be made regarding finding more resources if absolutely necessary. Consider a deadline on requests to keep pressures to a minimum.

Theoretically, the planning committee should have developed a projected budget that has included all area needs, and area coordinators should try to stay within budget whenever possible. The following sample budget can be used as your template.

SAMPLE SPONSORSHIP BUDGET WITH DETAILS

<table>
<thead>
<tr>
<th>ITEM</th>
<th>AMOUNT</th>
<th>SIZE</th>
<th>COST</th>
<th>SPONSOR NOTES</th>
</tr>
</thead>
<tbody>
<tr>
<td>Postage</td>
<td>1000</td>
<td>Mail out/bulk VIP invitations</td>
<td>Flyer 8&quot;x11&quot; Folded Standard card size</td>
<td>$100.00 Per thousand $33.00 Local postal union, $ value $100.00, need invoice for accountant</td>
</tr>
<tr>
<td>VIP Invitations</td>
<td>60</td>
<td>Standard card size</td>
<td>$60.00</td>
<td>Receipted</td>
</tr>
<tr>
<td>On-site Signage Banners</td>
<td>3 colour logo, with stands 4</td>
<td>3’ x 4’, 20’ x 5’</td>
<td>$120.00 $900.00</td>
<td>Local print shop will give discount. $ Value $100.00. Need invoice for accountant Local print shop, want their logo prominently</td>
</tr>
<tr>
<td>Sponsor ad</td>
<td>2 color</td>
<td>¼ page</td>
<td>$150.00</td>
<td>Local Newspaper</td>
</tr>
<tr>
<td>VIP Reception</td>
<td>60 people</td>
<td>$10.00 a plate</td>
<td>$600.00</td>
<td></td>
</tr>
</tbody>
</table>
SPONSORSHIP COORDINATOR’S PRE-EVENT CHECKLIST

❑ Have you checked all final promotional material for any errors and omissions of sponsor information?
❑ Have all the cash and in-kind sponsors and guests replied to your invitation to the VIP reception?
❑ Have you reviewed the program for the VIP reception?
❑ Have all the press kits been prepared for the reception?
❑ Is all sponsor signage ready for installation and has this been recorded on the production timeline?
❑ Has sponsor and guest information been relayed to the festival/event spokesperson?
❑ Do your volunteers have clear instructions about their roles for the reception?
❑ Have you organized a thank you list for cash and in-kind sponsors and guests?

KEEP ACCURATE RECORDS OF ALL CASH AND IN-KIND SPONSORSHIP ON A SPREADSHEET FOR FUTURE REFERENCE. KEEP COPIES OF ALL PROMOTIONAL MATERIALS THAT FEATURE THE SPONSORS.

POST-EVENT IT IS IMPORTANT TO CONTACT ALL SPONSORS FOR THEIR FEEDBACK ON THEIR PARTICIPATION. AS WELL, SEND ALL DONORS AND POTENTIAL DONORS A SUMMARY OF THE FESTIVAL/EVENT WITH YOUR THANKS FOR THEIR INTEREST AND/OR PARTICIPATION.
USEFUL RESOURCES

I. Information on funding sources in Alberta see Alberta Culture and Tourism – Grants and Foundations, [http://culture.alberta.ca/about/grants/default.aspx](http://culture.alberta.ca/about/grants/default.aspx)

II. Canadian Heritage has a program entitled, Building Communities Through Arts and Heritage, that provides funding on three levels – Local Festivals, Community Anniversaries and Legacy Fund. Information regarding these grants can be found at [www.pch.gc.ca/eng/1267799042836/1276800169608](http://www.pch.gc.ca/eng/1267799042836/1276800169608)

III. For information regarding setting up a fundraising plan see the Free Management Library [http://www.managementhelp.org/nonprofitfundraising/index.htm](http://www.managementhelp.org/nonprofitfundraising/index.htm)

IV. Volunteer Alberta has a site for searching for potential sponsors at, [http://www.volunteeralberta.ab.ca/services/funding/funder-database/](http://www.volunteeralberta.ab.ca/services/funding/funder-database/)
MEDIA RELATIONS/PROMOTIONS COORDINATOR

Managing expectations is extremely important in creating a successful festival/event and the Media Relations/Promotions Coordinator is responsible for making that happen. This person’s role is to ensure the right message is delivered to the right people and in the right medium. They’re responsible for providing information about the festival/event to the media as well as the general public.

A Media Relations/Promotions Coordinator should:

- be able to create advertising that captures the vision of the festival/event and then deliver it to the appropriate audience
- have excellent computer and communication skills
- have experience in the media relations field
- have contacts with local media and key contacts
- be able to manage media experiences during the festival or event and provide them with the information that reinforces the vision and theme

A key part of this job is managing the image of your festival/event. This requires preparing all material for the media and the event itself. This will include producing a press kit, promotional material for all media, internet and website promotions, public service announcements, articles, posters, brochures, flyers, programs, invitations, signage, advertising, pictures or video presentations.
CREATING A PLAN

To manage media relations/promotions effectively, start by writing down all the information needed to develop the materials:

1. What is the vision and mission? What is being sold?

2. Read the program and schedule for the festival/event. Who is performing? What activities are happening? Are there special guest speakers?

3. Include all important days, dates and opening and closing times that would be of interest to festival/event goers.

4. List the venue(s). How many indoor and outdoor performances are there? Are they ticketed? What is the capacity? Where can people buy tickets and get more information?

5. Who is the target audience? (Teens? Seniors? Families?)

6. What is the rationale for the selected theme? How can this message be delivered?
7. What is unique about the festival/event? What sets you apart from other festivals/events?

8. What is the desired outcome for the audience? How do you hope people will respond to the festival/event?

9. What community members can help with publicity? Is there an opportunity to invite associations, clubs, students and/or church groups to help distribute, sponsor and develop publicity?

10. Where could you get media sponsorship? Is there an opportunity with your local newspaper, television or radio station?

11. Ensure you have accurate and up-to-date information from each of the other coordinators. What are the details from each area? What are the unique or interesting selling features about each area?

*IT’S IMPORTANT TO GET STARTED ON A TIMELINE OF CRITICAL DATES AND DEADLINES FOR PROMOTIONAL ACTIVITIES AS SOON AS POSSIBLE. ENSURE COMMUNICATION WITH ALL OTHER COORDINATORS AND SHARE INFORMATION ABOUT SPONSORSHIP MEETINGS, VIP RECEPTION, INVITATIONS AND INTERVIEWS WITH LOCAL CIVIC LEADERS AND PERFORMERS. COMMUNICATION BETWEEN COORDINATORS AND THE COMMITTEE(S) IS KEY TO THE SUCCESS OF ANY FESTIVAL/EVENT.*
REACHING THE RIGHT PEOPLE

Knowing the potential audience is the most crucial element in the process of planning and initiating a festival/event media relations and promotional plan. Ask yourself if the demographic (age and socio-economic type) you’re trying to attract is mixed or does it lean towards young families, working couples without children and/or seniors. Are there satellite or neighboring communities that need to be considered?

This may be a good time to solicit opinions from different sectors of the community (such as youth and seniors) to determine the best way to market the festival/event. It is important to be as inclusive in all marketing messages as possible. Some obstacles to avoid:

- Marketing the festival/event to a specific group. An example is a heading that reads, “Family Fun For Everyone.” Seems innocent enough but many people will read this as a family only event. It is quite acceptable for a festival/event to advertise that it is family friendly or highlight family activities, but stay away from labeling the entire festival/event with one group unless this is your goal.

- If the festival/event is multi-day, avoid dividing the days up into entertainment and activities directed at specific groups. For example: Friday night is family-oriented, Saturday afternoon is teen-oriented and Sunday night is adult-oriented. Marketing a full weekend of programming fun that involves everyone is valuable as it provides cohesiveness, adds to the excitement and allows people to have choices. The goal is to have your audience present every day.

- Marketing too broadly, including too much information, can cause your audience to tune out. The who, what, when, where, why and how of a festival/event with a picture is not enough to generate interest. Use some of your marketing to feature highlights of the festival/event to engage the reader and create excitement.

- Visit other festivals/events to see how well other media campaign worked to aid the programming and the festival/event as a whole and keep in mind these three questions:
  1. Who was the marketing and promotional material targeted at? Was the target reached?
  2. Was there media sponsorship? Was it effective?
  3. Was the marketing tied into and reflective of the theming?
GETTING THE WORD OUT

There are many ways that the public can be reached. Don’t be shy - use every possible means to publicize the festival/event. Make a list of all the possible places you can publicize locally such as schools, clubs, churches, seniors’ centers, libraries, retail stores, businesses, organizations, newspapers, radio, mail outs, word of mouth, TV, magazines, other festivals/events, tourism organizations, community or organization website, etc. Using a variety of mediums helps to ensure the messaging is being delivered to the greatest number of people. Use the template below to help organize and record your efforts.

<table>
<thead>
<tr>
<th>ORGANIZATION</th>
<th>OUTREACH INTERNAL</th>
<th>OUTREACH EXTERNAL</th>
<th>HUMAN RESOURCES</th>
<th>RECORD OF ASSISTANCE</th>
</tr>
</thead>
<tbody>
<tr>
<td>School</td>
<td>Hand out flyers &amp; put up posters; Provide information for their weekly announcement segment; Get an article in the school newsletter.</td>
<td>Teachers could send information to other schools through their internal mailbag</td>
<td>Students may help with putting up posters and doing a flyer campaign; Volunteer for the event.</td>
<td>1 month out 10 students delivering flyers door to door.</td>
</tr>
</tbody>
</table>
TOOLS FOR A SUCCESSFUL MEDIA AND PUBLIC RELATIONS CAMPAIGN INCLUDE:

1. **Knowing the audience**: Having done some research regarding the demographic and interests of the target audience, how will the advertising and promotion best resonate with the various groups? Would putting up posters in local stores, schools, churches and clubs suffice? Is the local newspaper/newsletter a good choice? Do you need to advertise outside of your community?

2. **Creating a good press release**: Provide accurate information, check with local media for the format they prefer. Keep messaging succinct yet arouse interest. What is the theme for the festival/event? What are the unique selling features of the event?
3. **Developing articles for television, radio and newspapers**: It is important to grab the interest of the editor or promotions manager. Why would he/she promote the festival/event? Is there a human-interest angle? Is there something unique that could be marketed?

4. **Providing good on-going promotions**: Advertising is the means to get the festival/event information to the public. On-going promotions will help sustain interest. What are the various mediums that can be used for promotions?

5. **Produce a media/press kit**: A public service announcement (PSA), images or graphics, a program of the event/festival including a schedule and any other information pertinent to the festival/event should be included in the packages sent to the media. Give a media/press kit to the media as they arrive at the festival/event as well as the VIPs.
SAMPLE PUBLIC SERVICE ANNOUNCEMENT (PSA) TEMPLATE

LOGO:
Festival address:
Contact Information:
Website:

FOR IMMEDIATE RELEASE

Contact: ________________________________
Name: ________________________________
Title: ________________________________
Mobile: ________________________________
Office: ________________________________
Fax: ________________________________
Email: ________________________________

Dateline:

(FIRST PARAGRAPH)

Provide an exciting, short description of the festival/event including theme and highlights. Close with the festival/event slogan or a catchy phrase that ties back into the overall theme that the media can use to promote the festival/event.

(SECOND PARAGRAPH)

Provide an exciting, short description of the festival/event including theme and highlights. Close with the festival/event slogan or a catchy phrase that ties back into the overall theme that the media can use to promote the festival/event.
KEEPING TRACK

It is Media Relations/Promotions Coordinator’s responsibility to keep all media-related materials for future planning and archiving. Media-related materials include such things as, advertisements, press releases, public service announcements, brochures, programs, posters, flyers and mentions in the electronic and print media. Keeping an eye on the success of the campaign could include asking patrons where they found out about the festival/event, monitoring hits on the town or organization’s website, keeping track of calls for information to the festival/event office and noting any media sponsorship that was obtained.

MEDIA RELATIONS/PROMOTIONS COORDINATOR’S PRE-EVENT CHECKLIST

- Have all promotional materials for the final month been sent out?
- Are press kits ready for on site media promotions and VIP reception?
- Is there a designated place on site for the media to use for writing?
- Has media sponsorship been recognized in the festival/event material?
- Have you prepared a question and answer sheet for the organization spokesperson to review?
- Are promotional materials such as the program, brochures and other informational material printed and ready for distribution to the appropriate venues?
- Are you maintaining a file on all promotional material for the festival/event?
USEFUL RESOURCES

I. Find out what the local media use for a format and take a look at some of the advice found on the internet such as, Creating an Effective Press Release, http://content.moneyinstructor.com/1678/pressrelease.html

II. Tips on how to get the best results from your marketing and promotion see, Network For Good, http://www.fundraising123.org/article/making-most-your-limited-marketing-resources

ENTERTAINMENT & ACTIVITIES COORDINATOR

The function of the Entertainment and Activities Coordinator is to ensure the festival/event has programs and features that are appealing and appropriate for the audience and tie directly into the overall theme.

An Entertainment and Activities Coordinator should:

- clearly understand that programming needs to reflect the vision of the festival/event
- have good entertainment and activity contacts
- have experience in developing contracts, scheduling, programming, acquiring technical help and choosing appropriate venues
- have strong negotiation skills
- be organized and details-oriented

Managing the programming component of the festival/event requires a clear agenda for providing the audience with an entertaining experience that draws attention to the significant features of your goals and provides messaging consistent with your theme. The entertainment and activities coordinator will be required to execute the following:

- choosing suitable acts that fit the target audience
- selecting appropriate venues for the activities and performances
- determining the number of volunteers that will be required
- identifying all the materials, equipment and technical needs
- determining the cost and overall needs and communicating that to the Sponsorship Coordinator
- assessing the success of the programming
- reiterating the theme in all of the above

Depending on the size of the festival/event, it’s important to assess if the Entertainment and Activities Coordinator can also be responsible for the Vendor Coordination, or if another coordinator is required to fill this need. The roles and responsibilities of the Vendor Coordinator are outlined in the Vendor section.
GETTING INTO YOUR THEME

In “Having fun With Your Theme” Jan Bonhomme states, “If the theme is what you are packaging for the public, then the festival is the “package.” Take full advantage of the theme at every opportunity as it provides consistent, interconnected programming that people can more easily identify with.”

Review your Vision and Mission Statements and the objectives of your festival/event to aid in focusing your programming. The sample statement given in PART 1, used the mission statement that the organizers intended their event to be first-rate in highlighting the achievements and innovations of youth in sustaining the agricultural community and this was to be achieved through interactive activities and displays. What are the intentions of your festival/event?
The festival/event aims to create an environment to:

1. Celebrate what and how?

2. Bring awareness of what and how?

3. Share in values of what and how? (If family values are important then provide plenty of opportunities for them to interact.)

4. Inspire what and how? (Do you want people to go away with ideas on how they can participate more fully in the community? Help next year?)

5. Encourage what and how? (Are you hoping to promote excellence, community spirit or attendance?)
MAKING A PLAN
Planning the entertainment and activities for the festival/event should start by researching the target audience and possible participants in and around your community. Answer the following questions:

1. Who is the target audience? (Refer to the discussion in Part One.) The goal is to be as inclusive of everyone as possible. This does not mean that every portion of the program needs to appeal to every person, but the overall programming should have something for everyone.

2. Who in the community can participate through performances and activities?

3. What clubs, associations or groups would have materials that could be borrowed, or if bought will enhance the programming (displays, site décor, costumes and props)?

4. What is the most appropriate venue for the programming? Will a sports field work? How much temporary seating will be required? Is there enough power available? Adequate washroom facilities? Access to kitchen or would a portable facility better serve the festival/event?

5. Would children’s activities be better in the arena because they are out of the elements, close to facilities and safety is easier to monitor; or in the park under the trees where the visitors see the children and hear their laughter and excitement? Can an outdoor venue be accommodated?
6. What should be featured in the advertising? Think about the elements of the festival/event that highlight its goals and directly relate to the theme.

7. How many volunteers will be needed? For example, people will be required for line control at venues, front-of-house in venues to help with seating and ticketing, back stage coordination, changeovers on stage, technicians for every venue, costumed characters, food vendors, etc.

Think of other elements you want to include. Don’t try to do everything. Choose a few components and make them work well.

SCHEDULING
Organizing all the components of the program on a timeline is the easiest way to keep on schedule and identify gaps or issues before they become a problem. Begin the timeline as soon as you begin planning, starting with the festival/event opening and closing times, dates, as well as any other pertinent data pertaining to programming.

Refer to PART 3 for scheduling templates.

BUDGETING & RESOURCE ASSESSMENT
When allocating resources, develop a budget with the Production/Logistics Coordinator and check the following list for details to add to your budget and timeline:

- performer fees (develop contracts for all performers outlining all their responsibilities including performance and rehearsal times, event map and pay schedules)
- venue costs (charges may be associated with some venues i.e., maintenance, security and building costs)
- security personnel (volunteer staff or paid security. Some venues and town spaces may not allow volunteer security)
- front-of-house personnel (to coordinate line up control, box office/ticketing, seating, clean up, etc.)
- essential services (power, water, washrooms, emergency services and access)
- hospitality for participants (food and beverages for the performers on site)
- volunteer requirements
- technical equipment and materials requirements (sound, lighting, stages, tents, props)
- communication tools (cell phone, hard line, radio)
- directional and informational signage (back stage, hospitality, washrooms, exits, first aid, etc.)
ENTERTAINMENT & ACTIVITIES COORDINATOR’S PRE-EVENT CHECKLIST

- Have you constructed a minute-by-minute day of performance and activity schedule?
- Have you reviewed the estimated number of participants you expect?
- Have arrangements been made for the payment of contracts, box office receipts, reconciliation and bank deposits?
- Have you reviewed all performance and activity venues for any adjustments that need to be made to seating arrangements, timing of programming and any other issues that have arisen?
- Do the volunteers have clear written instructions as to what they are doing?
- Have all special guest speakers, emcees and other presenters received a schedule and written instructions about their participation that includes a schedule, performance location, payment arrangements, hospitality, secured storage area and contact information?
- Do you have a list of all programming needs including décor for the site and venues for the production team?

IT’S IMPORTANT TO KEEP RECORDS OF ALL SCHEDULED EVENTS, PARTICIPATION TOTALS VIA TICKET SALES OR HEAD COUNTS, CONDUCT CROWD SURVEYS FOR THEIR RESPONSE TO THE FESTIVAL/EVENT, GET FEEDBACK FROM PERFORMERS, COORDINATORS, VOLUNTEERS AND TECHNICIANS BY ASKING OR WITH A FORMAL SURVEY. THIS INFORMATION WILL PROVE HELPFUL IN FUTURE PLANNING AND EVALUATION.
USEFUL RESOURCES

I. For more information on themes see, Festivals and Events, http://festivalsandevevents.com/festival-planning/Planning-shtml; Shop other festivals/events in person and/or on the Internet for ideas.

**VENDOR COORDINATOR**

Vendor management involves handling health and safety regulations, placement and scheduling of vendors, developing contracts and putting together information packages for the vendors. The Vendor Coordinator should be someone who is organized, communicates well and has a good understanding of how various special event venues should run.

A Vendor Coordinator ideally should:

- know how to run temporary venues (i.e., kitchen, concession, craft tables, etc.)
- be able to effectively organize and communicate to a volunteer staff
- understand the necessary health and safety regulations for all food services and other potential venues/vendors
- be capable of determining when individual venues need individual coordinators or leaders

**INITIAL CONSIDERATIONS**

The size of the festival/event will help determine how many vendors will be needed. A small community event may only need a few food and beverage vendors. However, make sure that whatever is being served is enough to sustain an audience over a whole day or for the duration of your festival/event. If there is an event kitchen, make sure everyone strictly follows the health and safety regulations governing this type of operation. Keep in mind the theme of your festival/event when selecting vendors to participate so that their food service or wares sold tie into the theme (e.g., if it is a cultural event then you would want vendors serving foods that represent the culture that is being celebrated).

There are provincial regulations governing the operation of a bar or beer garden at a festival/event e.g., servers must be 18 years of age or older, hours of operation are regulated by the Province, as well as many other rules regarding service. If volunteers are used for service and security, be sure to communicate with the Volunteer Coordinator regarding the training and orientation of personnel for this area.

Invitations to local vendors should be extended before looking elsewhere. The community may have a farmers’ market, and/or art and crafts societies to draw on. If there is a subcommittee to handle this area, include representatives from the farmers’ market and arts and crafts societies to help plan, organize and implement the vendor program. If you are the only individual dealing with the program, solicit their advice. The site can probably handle more arts and crafts vendors than food vendors because they require fewer services. Nevertheless, be careful not to clutter the site and accept only quality products that contribute to the overall theme.
THE INFORMATION KIT

Your most important tool for dealing with vendors is an information package containing data about all their on-site needs for safety, expectations regarding opening and closing times, site requirements, etc. Maintaining good communications with the vendors is extremely important in building up their cooperation, loyalty and consistency for the festival/event as well as for the future.

All festivals/events with a vendor component require the following:

- contacting your regional health authority for guidelines concerning food handling and service (see www.albertahealthservices.ca)
- acquiring applications for food, arts, and craft vendor permits
- acquiring bar permits (if alcohol is being served); contact the Alberta Liquor Control Board (see www.aglc.ca/licences/specialevents.asp)
- evaluating and obtaining water, power, sewage, wash up and waste (dry and wet) disposal services work with the municipality and local utility providers
- estimating capacity, how many people can the areas(s) accommodate?
- estimating usage
- setting date for inspection, usually the day of or the day before the festival/event as vendors need to be set up prior to inspection
TO ORGANIZE THE VENDOR PROGRAM:

1. Create a timeline that establishes the date for sending out invitations/applications to vendors, the deadline for applications, dates to contact government agencies regarding permits and dates for inspections by the local health authority and the fire department.

2. Decide what the criteria are for accepting craft/food vendors. How will the vendors be chosen: by committee, by the coordinator, etc.? Should there be an emphasis on local vendors and arts and crafts? What kind of food and beverages would be appropriate and how can they tie into the overall theme?

3. Develop a vendor application (see example following this list). Include any regulations and rules they must follow, contact information, options for space size, description or photo of vendor’s booth, power, lighting, and cooking fuel requirements and fees and damage deposits, if they apply.

4. Set fees for vendor space, table and chair rentals, and lighting costs. These fees should reflect the size of the anticipated audience and can provide your organization some advance income for the festival/event budget. If essential services or rental equipment such as tables and chairs must be purchased, it’s a good idea to calculate these costs into the vendor fees. A damage deposit helps alleviate the costs of clean up and damages as well as discouraging late cancellations.
5. Work with the Production/Logistics Coordinator to place the vendors on a site map in the most appropriate place for easy access to bathroom facilities, seating, waste disposal and drinking water. Check that all facilities are handicap accessible. It is recommended that you provide vendors with a map designating their place on the site, the date and time for their load-in and load-out, showing where they can load in goods and equipment during the festival/event, where they must dispose of gray water, grease and other waste material and the hours of vendor operations. Strict adherence to these rules should be emphasized.

6. If you’re administrating a festival/event kitchen, prepare information documents for safe food handling and service. The local community hall could be a suitable venue if it contains all the services you need and passes inspection. Improper use of kitchen equipment, the handling of food, and food storage could cause contamination, allergic reactions and food poisoning.

7. Determine the number of volunteers needed and set schedules that include the load-in and load-out times.

8. Prepare orientation documents for food and bar service. All volunteers and staff need to be trained in the area they’ll be working in and should have an orientation at the venue prior to the opening of the festival/event. Include all staff and volunteers in the review of the menu, the recipes and the work schedules; demonstrate the use of equipment, maintenance procedures, hygienic practices, as well as teach volunteers and staff how to handle money and don’t forget to train all staff on dealing with the public.
EVALUATION

To monitor and assess the success of the vendor program, maintain a database of all vendors who participated and write them a letter asking for feedback on their experience. If time permits, a survey could be developed prior to the festival/event and distributed in the vendor information package. Items to address include:

- Were the services adequate?
- Was the space provided sufficient and did it meet their needs?
- Was their participation profitable?
- Did the patrons seem to enjoy the food? Crafts? Art?
- Do they have any suggestions?
SAMPLE VENDOR APPLICATION

LOGO:
Name Of Festival: ____________________________________________
Date(S) Of Festival/Event: ______________________________________

VENDOR APPLICATION

Submit Application to: _________________________________________
Mailing Address: _____________________________________________
Telephone: ( ) __________ Fax: ( ) __________ Email: __________
Application Deadline: (Date) __________

Please note: This form does not guarantee you a space in the festival/event. Please provide accurate information. We will be making a decision by __________________________ at which time you will receive a notification regarding your acceptance in the festival/event.

<table>
<thead>
<tr>
<th>SPACE SIZE</th>
<th>LOCATION</th>
<th>LOCATION</th>
<th>LOCATION</th>
</tr>
</thead>
<tbody>
<tr>
<td>10’ X 10’</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>10’ X 15’</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>10’ X 20’</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

PLEASE PRINT

Vendor Type: __________________________________________________
Contact Name: _________________________________________________
Full Address: _________________________________________________
Telephone: ( ) __________ Fax: __________ Email: __________

Please attach a photo or drawing of dimensions of booth. Include trailer hitches, overhangs, and extra space requirements.

All vendors must submit a $2,000,000 liability insurance policy with this application or a signed letter of intent from insurance company. Vendors must also submit a $200.00 damage deposit upon acceptance and signing of contract.

POWER REQUIREMENTS

Do you have a power panel? Y___N___; Are you self-contained? Y___N___; Do you need propane? Y___N___
Size___

Signature ___________________________ Date ________________________
VENDOR COORDINATOR’S PRE-EVENT CHECKLIST

❑ Are all vendor contracts finalized with an Alberta Health & Safety application completed, and permits and insurance submitted? Has information regarding the load-in and load-out schedule, time of operation and any other rules and regulations been distributed?

❑ Has the date for the local health authority and the fire department inspection been set?

❑ Are all volunteers in place and have you provided instructions on food handling and storage to the people working with food? Have you provided instruction to bar personnel on handling the public?

❑ Have you created a menu and cost sheets for the volunteers working cash? Have you developed information sheets regarding the operation of the kitchen and beer garden (if applicable) for posting?

❑ Have you developed the day of schedule for the operation of the festival/event food service and beer garden (if applicable) areas?

❑ Have you acquired permits for the operation of a festival/event food service area and the beer garden?

❑ Have you maintained a list of all needs for the vendor area and, a load-in and load-out schedule for the production timeline?

❑ Have you arranged with the Financial Manager for the distribution of cash boxes and cash floats?

KEEP A RECORD OF ALL EXPENDITURES TO EXAMINE AGAINST REVENUE. ASK PATRONS WHAT THEY THINK OF THE VENDOR PROGRAM AND MONITOR THE AREA FOR ANY PROBLEM SPOTS OR FOR IDEAS AND CHANGES FOR FUTURE YEARS.
USEFUL RESOURCES

I. For regulations and information regarding food handling and service, Alberta Health Services
   www.albertahealthservices.ca

II. The Alberta Liquor and Gaming Commission provides regulations and information on bar
    service, www.aglc.gov.ab.ca
PRODUCTION/LOGISTICS COORDINATOR

The Production/Logistics Coordinator is responsible for the festival/event site itself, the set up/take down of the site and its components, emergency protocol, parking as well as general site safety for the day(s) of the event. It is extremely important that this person understands the scope and importance of his/her role.

A Production/Logistics Coordinator ideally should:

- have the knowledge and experience to carry out the activities for site development, organization and implementation
- have full understanding of emergency protocol, requirements and procedures
- be an organized individual capable of scheduling and overseeing the many logistical elements that will take place simultaneously on the day(s) of the event
- be a good leader and an effective communicator
- have strong problem solving skills and the ability to stay calm

The Production/Logistics Coordinator makes the dream come true. Through discussions with city officials, local police services, the fire marshal and physical surveys of the site and venues, the Production/Logistics Coordinator will determine what can and cannot be done, taking into account all factors from ground conditions, to the availability of power, pedestrian walkways, etc. In addition, this role entails communicating with and determining all supplementary requirements (specific to each venue) from all coordinators to ensure the success of the site planning, organizing and implementing.

Production manages the physical site and all logistical matters within the site. The job entails working with all coordinators to determine their particular needs and how the production crew will meet their requirements. Checking the location, conditions, timing and scheduling, producing a site plan and map, obtaining all the necessary services and equipment and developing a risk assessment and contingency plan, are the major aspects of production.
MAKING A PLAN

In the planning stage, the committee has already found a location. The first thing the Production/Logistics Coordinator will do when beginning a plan of action and organizing the work is to assess the choice of site and venue(s) for programming suitability. Make checklists for the venue, site and technical requirements.

Your venue checklist should include:

- space suitability
- capacity
- walkways
- kitchen and equipment
- fire certification, extinguishers, alarms
- emergency exits
- phone/communication equipment access
- venue manager contact information
- power and water
- bathroom facilities
- disability access
- venue Insurance
- parking
- box office facilities
- back stage space and secure storage
- technical equipment
- signage
- lighting

Your site checklist should include:

- space suitability
- capacity
- health and safety (hazards)
- bathroom facilities
- first aid
- lost & found
- information
- security
- emergency contact and access
- essential services contact and access
- parking
- lighting
- audience flow
- sight lines (seating)
- signage includes directional, street closures, hazards etc.
Your equipment and technical requirement checklist should include:

- audio/visual, staging, temporary stairs, flooring, etc.
- street barriers, exits for pedestrians and traffic
- stanchions (or other forms of crowd control)
- fencing
- flagging tape, mats, extension cords, etc.
- storage
- chairs and tables
- truck
- reflective vests
- fire extinguishers
- temporary bleachers
- performance specific equipment
- activity specific equipment
- special feature/effect equipment
- décor
- waste disposal (wet and dry)
- recycling

Review Selecting the Location in the Planning section of Part One to determine which factors need to be considered here. Create a Site Assessment document and put everything in it from parking and bathroom locations, to each individual vendor, venues, all exits, performance space and assess everything for suitability.
PERFORM A RISK ASSESSMENT

A Risk Assessment identifies any hazards or issues that need to be addressed to eliminate accidents or mishaps that would require the assistance of emergency services such as ambulance, police and fire department. All risks should be listed and prioritized according to their potential seriousness, and what actions and procedures need to take place to remove as many of those risks as possible. The site should be evaluated for emergency egress and procedures put in place should these services be necessary. All coordinators should have a complete understanding of the procedures and protocol should an emergency arise.

1. List hazards or problem areas with your site. Who might be affected? How do you eliminate the risk?

2. Within the risk assessment a contingency plan regarding inclement weather should also be produced. What if venues must move due to heavy rain or snow? Are there facilities available to move programming should the need arise?

3. Create a site map including all performance and activity areas, facilities, vendor locations, special attractions, gates, first aid, lost and found, administration, exits, etc. Distribute map to all coordinators and include it in the program if your festival/event is large enough to require a map. There is software or on-line programs to help you produce a map of your site. (See Useful Resources located at the end of this section).
### SAMPLES OF RISK ISSUES AND SUGGESTED ACTIONS

<table>
<thead>
<tr>
<th>VENUE</th>
<th>ISSUES</th>
<th>ACTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Food &amp; Craft, Arts Vendors</td>
<td>Sitting on grass, uneven ground, little shade, not close to power power</td>
<td>Pull the vendor sites forward onto the pavement and have shade canopies available. This allows for cable to be behind vendors, not interfering with pedestrian traffic.</td>
</tr>
<tr>
<td>Main Performance Tent</td>
<td>Sight lines inadequate, stage not visible after 4 pm</td>
<td>There is enough space to turn the tent around and develop good audience sight lines.</td>
</tr>
<tr>
<td>Audience Entrance From Main Parking Lot</td>
<td>Uneven concrete/high concrete curbs</td>
<td>Fill with soft asphalt or temporary wooden ramp</td>
</tr>
<tr>
<td>Pedestrian Exit</td>
<td>Too dark</td>
<td>Provide mobile lighting and generator</td>
</tr>
<tr>
<td>Duck Pond at end of Grassed Performance Area</td>
<td>Hazard to young children</td>
<td>Fence it and assign roving security to the area</td>
</tr>
<tr>
<td>Arena</td>
<td>Maintaining exiting abilities while audience is lined up for next show</td>
<td>Use stanchions to distinguish entrance and exit lines; inform security on-site and front-of-house volunteers</td>
</tr>
<tr>
<td>Rain on outdoor venues</td>
<td>Power outlets running along the ground</td>
<td>All connectors should be wrapped and water-proofed and secured off the ground</td>
</tr>
</tbody>
</table>
CREATING A TIMELINE

1. **Focus your thoughts:** Using your designated role and responsibility write down what it is you want to achieve with the time allotted. For example, the Production Manager for the Edmonton Folk Music Festival stated, “It is important to understand the vision and mission of each area so that I can appreciate the requests coordinators ask of me; then I can make the vision and mission a reality. It is my goal to create the most comfortable, safe and enjoyable site for the patrons, and as trouble-free and painless as possible for those working the event.”

2. **Communicate with the coordinators:** You will have to compile data from all areas. What are their goals? What resources do they need from you? Where and how are you going to get these resources? How will you respond to unfeasible requests? Do you have an achievable option? Think about the programming ideas and list the resources you will need and where you might get them. Are there obstacles? How will you overcome them?

3. **Prioritize:** Having all the information at hand, you can begin to break down the goals into achievable steps on a timeline. What are the most important components to work on immediately? Is the site suitability assessed? Do you want to begin a map?

4. **Manage your time:** Schedule meetings with only the pertinent coordinators or volunteers about specific issues regarding the site or venues outside of the regular coordinator meetings. Delegate tasks and empower the coordinators to handle their areas.
5. **Problem solve early:** You’ve plotted your tasks on the timeline and begun production planning. If some set up schedules or other requests contradict, how will you resolve this dilemma?

6. **Research all possible sources for your requirements:** Talk with everyone in the community. Find out who has what and if they will let you borrow, rent at a discounted price or have them donate it to the festival. Contact other festivals/events in and around your community to source more equipment and materials. For example, would your school, town, theatre group and community centre have resources you can use? Will the town and local business provide in-kind support?

7. **Assemble all dates, locations, times and contacts on the timeline:** Put everything in chronological order and indicate priority areas. Determine how much time each step will take, how many people you will need, where the resources are coming from and how you’re going to get them.

8. **Review and Relax:** Place dates on your timeline for an overall review of the steps and the objectives. Speak with all the coordinators about their progress and any gaps in their production.

*REMEMBER THAT COMMUNICATION IS THE KEY TO GENERATING AN EFFECTIVE FESTIVAL/EVENT TIMELINE AND A DAILY OR MONTHLY SCHEDULE. PRODUCING GOOD REPORTS FROM INFORMATION GATHERED FROM YOUR TIMELINE FOR YOUR FESTIVAL/EVENT MEETINGS MAKES IT EASIER TO IDENTIFY CONCERNS OR GAPS, AND GIVE YOU A SENSE OF ACCOMPLISHMENT WHEN A TASK IS COMPLETE. FURTHER, IF EVERY COORDINATOR IS ON THE SAME PAGE IN TERMS OF HAVING A TIMELINE IN PLACE, DISCUSSIONS, PROBLEM SOLVING AND RESOLUTIONS CAN BE MUCH MORE PRODUCTIVE.*
PRODUCTION BUDGET

Production budgets will depend on the size of the festival/event. Keep an ongoing budget to monitor expenses. If costs are becoming higher than anticipated, it may be worth considering borrowing gear or seeking sponsorship. The following budget is from a large music festival. Please note the actual and in-kind columns. This event saved close to $60,000. When developing your own budget always consider a way to decrease the costs.
## SAMPLE PRODUCTION BUDGET

<table>
<thead>
<tr>
<th>ITEM</th>
<th>PROJECTED</th>
<th>ACTUAL</th>
<th>IN-KIND</th>
<th>GST</th>
<th>NOTES</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fixed Costs</td>
<td>$20,000.00</td>
<td>$16,000.00</td>
<td>$4,000.00</td>
<td>$800.00</td>
<td>4 stage tents</td>
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<tr>
<td>Set Up/Supervisor</td>
<td>$1,000.00</td>
<td>$1,000.00</td>
<td></td>
<td>$50.00</td>
<td>One day</td>
</tr>
<tr>
<td>Teardown/Supervisor</td>
<td>$1,000.00</td>
<td>$1,000.00</td>
<td></td>
<td>$50.00</td>
<td>One day</td>
</tr>
<tr>
<td>Local Crew - in/out</td>
<td>$2,560.00</td>
<td>$2,560.00</td>
<td></td>
<td>$128.00</td>
<td>Crew for in/out (12x8)+(8x8) x $20.00</td>
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<tr>
<td>Sound System(s)</td>
<td>$12,000.00</td>
<td>$10,500.00</td>
<td></td>
<td>$525.00</td>
<td>4 X sound rigs + two light rigged/techs</td>
</tr>
<tr>
<td>Audio/Visual</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Screen</td>
<td>$1,500.00</td>
<td>$1,000.00</td>
<td></td>
<td>$50.00</td>
<td>Pick up Thurs. 5 pm</td>
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<tr>
<td>Overhead Projector</td>
<td>$500.00</td>
<td>$350.00</td>
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<td>$17.50</td>
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<tr>
<td>Staging</td>
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<td>$450.00</td>
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<td></td>
<td>$22.50</td>
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<tr>
<td>Electrical Mats</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Town</td>
</tr>
<tr>
<td>Stairs/Handrails</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Lighting</td>
<td>$1,600.00</td>
<td></td>
<td></td>
<td></td>
<td>Included in Sound Expenses</td>
</tr>
<tr>
<td>Props</td>
<td></td>
<td></td>
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<tr>
<td>Danger Tape</td>
<td>$48.00</td>
<td>$47.79</td>
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<td>Audio Techs</td>
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<td>Included in Sound Expenses</td>
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<td>Garbage Bins</td>
<td>$250.00</td>
<td></td>
<td></td>
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<td>40 from rental - pick up - delivery</td>
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<td>Cardboard Disposal</td>
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<td>$287.00</td>
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<td>$14.35</td>
<td>30 yard - one time-pick up</td>
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<td>Recycling Other</td>
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<td>Toilets</td>
<td>$1,500.00</td>
<td>$1,479.00</td>
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<td>$73.95</td>
<td>10 - one day/ one clean</td>
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<td>Garbage Bags</td>
<td>$75.00</td>
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<td>$3.55</td>
<td>Large size/2 cases</td>
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<td>Item</td>
<td>Cost 1</td>
<td>Cost 2</td>
<td>Cost 3</td>
<td>Notes</td>
<td></td>
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<tr>
<td>-----------------------------</td>
<td>--------</td>
<td>--------</td>
<td>--------</td>
<td>--------------------------------------------</td>
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</tr>
<tr>
<td>Recycling Bags</td>
<td>$75.00</td>
<td>$69.00</td>
<td>$3.45</td>
<td>Large size/2 cases</td>
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<tr>
<td>Brooms</td>
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<td>Daytime</td>
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<td>$300.00</td>
<td>$15.00</td>
<td>2 x $15.00 x 10</td>
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<td>Truck Rental</td>
<td>$150.00</td>
<td>$147.98</td>
<td>$7.40</td>
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<td>Fuel</td>
<td>$75.00</td>
<td>$82.50</td>
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<td>Van For Artist</td>
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<td>$147.98</td>
<td>$7.40</td>
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<td>Grease Disposal</td>
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<td>Free pick up for recycle</td>
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<td>Electrical Set Up</td>
<td>$2,340.00</td>
<td>$2,430.00</td>
<td>$121.50</td>
<td>10 booths (recoverable with rents)</td>
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<tr>
<td>Plumbing</td>
<td>$2,200.00</td>
<td>$2,100.00</td>
<td>$105.00</td>
<td>10 booths (recoverable with rents)</td>
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<tr>
<td>Permit</td>
<td>$450.00</td>
<td>$450.00</td>
<td>$22.50</td>
<td>10 booths (recoverable with rents)</td>
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<tr>
<td>Electrical Boxes</td>
<td></td>
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<tr>
<td>Trailer</td>
<td>$600.00</td>
<td>$580.00</td>
<td>$29.00</td>
<td>12 months @ $ 50.00</td>
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<tr>
<td>Room</td>
<td>$1,800.00</td>
<td>$1,790.00</td>
<td>$89.50</td>
<td>10 x 20 room x 12 months</td>
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<td>Storage Container</td>
<td>$400.00</td>
<td>$400.00</td>
<td>$20.00</td>
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<td>Container Transport</td>
<td>$720.00</td>
<td>$720.00</td>
<td>$36.00</td>
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<tr>
<td>Props</td>
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<td></td>
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<tr>
<td>Road Detours</td>
<td>$1,800.00</td>
<td>$1,690.00</td>
<td>$84.50</td>
<td>$90.00 x 4 x 5 hours</td>
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<tr>
<td>Tent Permits</td>
<td>$120.00</td>
<td>$120.00</td>
<td>$6.00</td>
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<td>Barricades</td>
<td>$670.00</td>
<td>$550.00</td>
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<td>Parking Meter Covers</td>
<td>$350.00</td>
<td>$320.00</td>
<td>$16.00</td>
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<tr>
<td>Fence</td>
<td>$500.00</td>
<td>$480.00</td>
<td>$24.00</td>
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</tr>
<tr>
<td>Rope &amp; Cable Ties</td>
<td>$125.00</td>
<td>$89.00</td>
<td>$4.45</td>
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<tr>
<td>Fire Extinguishers</td>
<td>$50.00</td>
<td>$45.00</td>
<td>$2.25</td>
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<tr>
<td>Degreaser for spills</td>
<td>$35.00</td>
<td>$34.50</td>
<td>$1.73</td>
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</tr>
<tr>
<td>Tents For Info/Volunteers</td>
<td>$650.00</td>
<td>$650.00</td>
<td>$32.50</td>
<td></td>
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</tr>
<tr>
<td>Item</td>
<td>Cost</td>
<td>Item</td>
<td>Cost</td>
<td>Item Description</td>
<td></td>
</tr>
<tr>
<td>-------------------------------------</td>
<td>--------</td>
<td>--------</td>
<td>--------</td>
<td>-------------------------------------------------------</td>
<td></td>
</tr>
<tr>
<td>Tents For Special Events</td>
<td>$1,200.00</td>
<td>$1,190.00</td>
<td>$60.00</td>
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<td></td>
</tr>
<tr>
<td>Extension Cords</td>
<td>$125.00</td>
<td>$110.00</td>
<td>$5.50</td>
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<td></td>
</tr>
<tr>
<td>12' ladder</td>
<td>$-</td>
<td></td>
<td></td>
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<td>Tables</td>
<td>$180.00</td>
<td>$180.00</td>
<td>$9.00</td>
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<tr>
<td>Chairs</td>
<td>$175.00</td>
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<td>$8.75</td>
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<td>Locks</td>
<td>$25.00</td>
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<tr>
<td>Dollies &amp; Wagons</td>
<td>$300.00</td>
<td>$225.00</td>
<td>$11.25</td>
<td>For storage containers</td>
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</tr>
<tr>
<td>Power Bars</td>
<td>$50.00</td>
<td>$46.50</td>
<td>$2.33</td>
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<tr>
<td>Grommet Kit</td>
<td>$27.00</td>
<td>$22.50</td>
<td>$1.13</td>
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<tr>
<td>Rubbermaid Bins For Storage</td>
<td>$85.00</td>
<td>$81.45</td>
<td>$4.07</td>
<td>Loose articles storage</td>
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<td>Scaffold</td>
<td>$1,600.00</td>
<td>$1,490.00</td>
<td>$74.50</td>
<td>8 small towers and 4 sound booths</td>
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<tr>
<td>Labour for Scaffold</td>
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<td>$890.00</td>
<td>$44.50</td>
<td>In/out costs</td>
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<td>Food For Site Volunteers</td>
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<td></td>
<td></td>
</tr>
<tr>
<td>Food For Set up</td>
<td>$156.00</td>
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<td>$7.80</td>
<td>Two meals during setup</td>
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</tr>
<tr>
<td>Food for Load out</td>
<td>$96.00</td>
<td></td>
<td>$4.80</td>
<td>One meal during teardown</td>
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</tr>
<tr>
<td>All Sign Production</td>
<td>$1,250.00</td>
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<td>$62.50</td>
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<td></td>
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<tr>
<td>Logo Flags</td>
<td>$422.00</td>
<td></td>
<td>$21.10</td>
<td>10 - Festival banners for decor</td>
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<tr>
<td>Banners</td>
<td>$600.00</td>
<td></td>
<td>$30.00</td>
<td>4 banners for entrances 1 x 6 M</td>
<td></td>
</tr>
<tr>
<td>Graphic Design</td>
<td>$250.00</td>
<td></td>
<td>$12.50</td>
<td></td>
<td></td>
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<tr>
<td>Printing</td>
<td>$750.00</td>
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<td>$37.50</td>
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<tr>
<td>Paper Plates</td>
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<td>$7.70</td>
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<td></td>
</tr>
<tr>
<td>Coffee Urn</td>
<td>$69.00</td>
<td></td>
<td>$3.45</td>
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<td></td>
</tr>
<tr>
<td>TOTAL</td>
<td>$59,137.20</td>
<td>$2,956.86</td>
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</tr>
<tr>
<td>Based on $100,000 budget</td>
<td>$58,837.20</td>
<td>$2,941.86</td>
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</tr>
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</table>
PRODUCTION SCHEDULE

Once you have assessed the site and venues, organize the information onto a site plan then develop a schedule to record all the details. (See how to create and use a Gannt Chart in Useful Resources). The following sample timeline is modified from an actual event and is intended to illustrate some of the items that may be required for a production crew.
SAMPLE PRODUCTION SCHEDULE

**Wednesday July 4**
- 9:30 a.m. Volunteers arrive. Set up media launch. (Sound Technician/Production Manager)
- 11:00 a.m. Media launch.
- 12:15 p.m. Media launch take down. (Audio equipment to storage.)

**Afternoon**
- Pick up cube van.
- Pick up tools, signage, rope, all to storage in van.
- Get lunch for volunteers.
- Check final trailer-towing arrangements.
- Finalize scaffolding delivery arrangements.

**Thursday July 5**

**Load-In Day**
- 8:00 a.m. Volunteers arrive after lunch. Need supervisor for scaffolding. Inspection of site with Town.
- Scaffold delivered, must be set up.
- Plumber arrives for plumbing site.
- Power setup.
- Sound set up.
- Toilets –confirm 4 for vendors.
- Tent set-up with volunteers, supervisor needed.
- Signage install, banners with sponsor logos first.
- Water coolers in. (pick up water)
- Pop delivery. (product and coolers)
- Vendor arrival/setup late afternoon following scaffolding set up.
- Send truck & driver to p/u water.

**5:00 p.m.** Staff meeting. (hospitality room)

**6:00 p.m.** Night security arrives.

**Friday July 6**
- 7:00 a.m. Day security begins, keys for truck and lock up to production office, check site, open info, water cooler check, open Information booth/office.
- Morning Environment volunteers arrive, make sure they have equipment.
- Set up tech/power stuff. (Front-of-house takes care of sound equipment)

**11:30 a.m.** First show

**Day** Coordinate security, review procedures for lost kids, recycling to depot.
Saturday July 7
7:00 a.m. Volunteers arrive. Check site, open information booth/office, water cooler check, open Info.
Morning Environment on site.
Set up tech/power stuff. (Front-of-house takes cares of sound equip.)
11:30 a.m. First show.
Day Coordinate security, chase bottle pickers, lost kids, recycling to depot.
Environment maintenance, stanchions for children’s area, trip hazards, officials and concession spills check.
2:30 p.m. Strike seating, risers, signs, LX and sound. (if weather good.)
3:00 p.m. Final show
4:00 p.m. Set-up for volunteer appreciation dinner. (sound tech)
5:00 p.m. Site closed/load-out.
Venue take down. (seating, risers, signs, lights and sound)
Roll and label signage.
Fencing down.
Tents down.
Vendors leaving.
6:00 p.m. Volunteer appreciation.
Midnight Dinner take down. (sound tech)

Sunday July 8
8:00 a.m. Scaffold pick up.
Volunteers to load up tents, barrels, fencing, tables, chairs on pallets.
12:00 p.m. Hospitality coordinator needs everything out of venue.
Full Day Cube van to storage with festival signage and gear.
Town to pick up barriers.
Volunteers for garbage pick up.
Security in at 6:00 pm for last night.

Monday July 9
8:00 a.m. Inspection of site and venues with Town and venue managers.

THE EVALUATION ASSESSMENT OF THE PRODUCTION AREA SHOULD INCLUDE QUANTITATIVE DATA INCLUDING BUDGET, NUMBER OF VOLUNTEERS AND HOURS OF WORK. QUALITATIVE DATA COULD INCLUDE MONITORING THE VENUES FOR THE QUALITY OF THE SOUND AND LIGHTING, CAPACITY, CONDITION OF THE SITE WHILE IN OPERATION AND THE TIMING OF LOAD IN AND LOAD OUT OF VENUES.
PRODUCTION/LOGISTICS COORDINATOR’S PRE-EVENT CHECKLIST

❑ Have you created a production schedule and reviewed the detailed site map for any errors and omissions?
❑ Have you confirmed dates and times for pick-ups, deliveries and returns with suppliers and area coordinators?
❑ Do you have a system in place for storage and inventory of all supplies on site?
❑ Do you have sufficient volunteer help and have your volunteers received a production schedule?
❑ Have you created and distributed documentation to all committee members and coordinators, your emergency and contingency plan, protocol and procedures?
❑ Do you have a location for First Aid, Lost & Found and Information?
❑ Do you have all your permits, licenses and contracts for suppliers?
❑ Do you have a contact list for all essential and emergency services?
❑ Is signage and an installation map prepared?
❑ Are cell phones and radios ordered and distribution procedures organized?
❑ Have you identified all hazards and constructed a risk assessment document?
❑ Are security personnel clear about chain of command, emergency response procedures, how to handle the public, what their position is and what the rules and regulations are regarding the overall site?
❑ Have you reviewed all venue schedules, signage, equipment and technical needs and access for production personnel the day of the festival/event?
❑ Have all transportation requirements been set up?
❑ Have you constructed a vendor map with all kiosk spaces, power, water, sewage access and waste disposal clearly marked?
USEFUL RESOURCES

I. For estimates regarding the cost of staging, lights and sound, ask your local production companies for advice. A short listing can be found at, 
http://www.musicdirectorycanada.com/pdf/soundlighting.pdf:  
The Yellow Pages offers the best results for show equipment rentals.

II. Helpful information in regards to site planning and mapping can be found at, 
http://www.londoneventstoolkit.co.uk/event-management/site-planning/

III. For information regarding creating maps see,  
https://support.google.com/maps/answer/3045850?hl=en-uk&rd=2

IV. Although the map examples listed here are from very large festivals, they give you a good idea of what these festivals put on their maps to help patrons find their way around the grounds, http://www.calgaryfolkfest.com/festival/map/; Winnipeg, http://winnipegfolkfestival.ca/folk-fest/festival-info/

V. A Gannt Chart is a very useful tool for the entire organization; for production it helps determine what tasks need to be done, how long they will take, and when they need to be completed. The You Tube site walks you through building a Gannt Chart,  
http://ca.youtube.com/watch?v=CW_wGSFavTc
VOLUNTEER COORDINATOR

The Volunteer Coordinator is an extremely important member of any festival/event committee. This person ensures there is enough manpower on all levels to ensure the festival/event’s success. In addition, they’re responsible for recruiting, caring for and organizing all the volunteers for the weeks and month leading up to, as well as the day(s) of the festival/event.

The Volunteer Coordinator ideally should:
- have experience working in the volunteer sector
- possess good communication skills
- be aware of all the components of a good volunteer program
- have the ability and knowledge to recruit and maintain volunteers
- be able to effectively schedule volunteers for all aspects of the process
- be able to efficiently direct and lead volunteers
- be able to communicate with committee coordinators to assess needs

Alberta is recognized as one of Canada’s leading provinces for volunteer involvement. People volunteer for a variety of reasons including enjoying the type of programming offered, gaining new skills, meeting new people and being a good citizen. Volunteers are the backbone of any festival/event so it is important they’re provided with every reason to continue to volunteer year after year.

If your festival/event seems too small to worry about placing someone in charge of volunteers, think again. There are numerous details to attend to concerning the use of volunteers. If the goal is to have the festival/event continue for years to come, relying on friends and family members to help out will not be enough.

The Volunteer Coordinator is responsible for the development of volunteer information, recruitment, screening, placement, orientation and recognition of volunteers as well as developing tools for the coordinators to help them organize and inform their individual area volunteers.
MAKING A PLAN

The first step in developing a volunteer program is to acquire the following information:

1. Venues and programs, list every area that may require help including Information Centre, Lost and Found, First Aid, the main stage, venue set up and tear down, etc.

2. Who is in charge? Who are the Coordinators’ and Assistant Coordinators’? What is their contact information? What are their job descriptions?

3. What are the volunteers required to do? E.g., What are their job descriptions? How will expectations be communicated? Is there more than one task at a venue? For example, at a major performance stage, volunteers will be needed for front-of-house, crowd control and backstage help with performers, etc.

4. Where is the venue? Inside or outside?

5. What are the opening and closing times of venues? When does the festival/event start and finish? Do times change depending on the day? Are there any extraordinary time schedules for example, pre-event set up and post-event take down, manufacturing of materials pre-event?
CREATING A VOLUNTEER MANUAL

Develop a Festival/Event Volunteer Manual that includes:

- A Welcome to the volunteers from the Volunteer Coordinator and the festival/event organization.
- Contact Information for the Volunteer Coordinator and the festival/event.
- Festival/Event Information regarding parking, check-in and out procedures, access to shows.
- Volunteer Code of Ethics including what is expected of the volunteers in terms of their commitment, behavior with each other, guests and the public.
- Rules & Regulations regarding drugs & alcohol, no show and late policies and procedures.
- Identification on-site that may include a badge and/or an article of clothing (i.e., hat or t-shirt).
- Volunteer Rights consisting of their placement, training and orientation for their area, accurate information regarding their role and responsibilities and work schedule.
- Festival Policies regarding the Freedom of Information Act, background checks, child protection, disciplinary procedures and any other legal issues.
- Volunteer Time Commitment containing a schedule for each area while trying to be consistent across the event (For example, 20 hour commitment per volunteer, 4 shifts @ 5 hours each over 3 days).
- Volunteer Benefits may take the form of a post-festival/event party, on-site privileges such as hospitality, pins, hats, t-shirts or any combination of the above (all volunteers should receive a program and identification as a volunteer).
- Job Descriptions outlining each job and its role and responsibilities.
- Orientation Dates, Times & Locations should be communicated with enough notice.
Individual Area Volunteer Packages should contain:

- Name and location of venue or area.
- Coordinator and Assistant Coordinator contact information.
- Work schedule.
- Information pertinent to the specific area (for example, the volunteer working front-of- house for the on-stage portion of the festival should know this job entails handling seating, line control, ticketing, maintenance of the venue and exiting procedures.) The volunteer for this job should enjoy working with people, have some experience dealing with crowds, young people and handling ticketing procedures.
- A sample of “Frequently Asked Questions” with the appropriate response (For instance, where is the bathroom? Can I leave and come back in?).
- Information about what to bring and where personal items may be safely stored.
- Program or a copy of the master schedule for the festival/event.
RECRUITING

Once you have compiled information regarding the human resource needs for the festival/event, the next step is recruiting volunteers. No doubt family, friends, associates will help fill the gaps, but they may not cover all areas and a long-term festival/event needs to consider future requirements.

1. **Who can be approached as potential volunteers?** Are there opportunities for families to volunteer together, youth, retired people or groups?

2. **Where can volunteers be located?** Think about all the organizations, clubs, churches, schools and various societies that may have people who want to be involved. Put up volunteer opportunity information in all public places where it is allowable and place ads in your local newspaper/newsletter, school newsletters, church bulletins, on your website and anywhere else that people will read and see information about the festival/event.

3. **How will I screen volunteers and place them?** Using your application form refer to Volunteer application template (found in this section) to access a volunteer’s skills, knowledge and motivation and review in relation to the overall goals and expectations of the festival or event. Set up an interview to discuss the event, the volunteer’s expectations and the volunteering options available.
4. **What will the orientation consist of?** Volunteers need to know the overall reason for the festival/event’s existence, as well as the vision and mission, the structure of the festival/event, the chain of command and what is expected of them leading up to and the day(s) of the festival/event.

5. **What information do the coordinators need to know?** As the Volunteer Coordinator it is your responsibility to provide the other coordinators with all the information about volunteers recruited for the venue(s) or area(s) they will be organizing and all pertinent details. Coordinators are in charge of providing you with the number of volunteers needed, preparing an information sheet, developing a work schedule, holding an orientation meeting and managing their area.

6. **How will the festival/event recognize volunteer endeavors?** There are many ways a festival/event can show their appreciation to the volunteers - treating them with respect, allowing them to help in the planning process and providing an opportunity for feedback about their experience. Holding a post festival party to honor all volunteers and distributing certificates of appreciation, for example, is another option.
# SAMPLE APPLICATION TEMPLATE

## VOLUNTEER APPLICATION FORM

<table>
<thead>
<tr>
<th>Name of Festival/Event:</th>
<th>Phone, Fax &amp; Email Address:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Date of Festival/Event:</td>
<td>Website Address:</td>
</tr>
<tr>
<td>Mailing Address:</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Name:</th>
<th>Home Phone:</th>
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<tbody>
<tr>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Address:</th>
<th>Mobile:</th>
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<tbody>
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<table>
<thead>
<tr>
<th>Postal Code:</th>
<th>Email:</th>
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</table>

<table>
<thead>
<tr>
<th>T-Shirt Size: sm</th>
<th>med</th>
<th>lg</th>
<th>xlg</th>
<th>xxlg</th>
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</thead>
<tbody>
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<table>
<thead>
<tr>
<th>First Aid Certificate held:</th>
<th>Number:</th>
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<table>
<thead>
<tr>
<th>Driver's License Number (For Transportation Crew only):</th>
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</table>

Do you have any special needs we should know about? **Yes:** No:
(e.g.: diabetes, serious allergies or other dietary considerations, mobility restrictions)
If “yes’ please explain (This information will help us place you more effectively.)

<table>
<thead>
<tr>
<th>ALL VOLUNTEERS MUST BE PREPARED TO GIVE A (X) HOUR COMMITMENT</th>
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</thead>
<tbody>
<tr>
<td>Which shifts do you prefer? (Based on 4 hour shifts)</td>
</tr>
<tr>
<td>Mornings</td>
</tr>
</tbody>
</table>

### PRE-FESTIVAL/EVENT VOLUNTEERING

- Office (2 weeks before festival/event)
- Craft Prep
- Pick Ups
- Site Set Up
- Site Load Out

<table>
<thead>
<tr>
<th>Where have you volunteered before?</th>
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<tbody>
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<td></td>
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</table>

<table>
<thead>
<tr>
<th>Why do you want to volunteer for this festival/event?</th>
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</table>

### FESTIVAL/EVENT CREWS

Which area(s) would you be most interested in volunteering in?

- Site
- Security
- Food Services
- Bar & Bar Service
- Stage(s)
- Marketing & Media
- Environment (garbage & recycling)
- Children’s Activities
- Special Projects

---

This sample application template is a composite of several applications used by festivals in Edmonton, Alberta. You’ll want to include your particular information.
VOLUNTEER AGREEMENT

(name of festival/event) agrees to provide adequate information and assistance for the volunteer to be able to meet his/her designated requirements.

As a volunteer, I agree:

• to adhere to the festival rules and procedures
• to meet the time and duty commitments scheduled by the coordinator or to provide adequate notice of my absence to my coordinator so that alternate arrangements can be made
• to report to coordinator for assigned shifts
• to wear my festival/event name tag and T-shirt/vest, hat while on shift, representing the festival/event
• to behave in a friendly and courteous manner when dealing with the public and other volunteers
• not to hold the festival/event or any of its representatives liable for any loss or damage to my person or injury to my property that may occur during festival/event activities
• to be aware that any violation of rules, written or oral may result in termination of my volunteer duties

This application will be processed and the Volunteer Coordinator will contact you to arrange for you to come in for a personal interview.

{NOTE: Many volunteer applications have a request for volunteers dealing with cash or children, to agree to a criminal record check and/or sexual offender registry check. If you do not know the volunteers who will be working in these areas, you should have this request on the application and follow it up. As a rule it is best to err on the side of caution.}

Signature: __________________________ Date: __________________________
VOLUNTEER RIGHTS
Volunteers are entitled:
- to be treated with respect
- to be properly informed about the festival/event, its expectations, procedures and rewards
- to know what is expected of them and feel comfortable
- to be recognized for their contribution
- to be treated fairly

VOLUNTEER BENEFITS COULD INCLUDE
- commemorative T-shirt/hat
- volunteer hospitality room
- volunteer appreciation event
- complimentary event program
VOLUNTEER POSITIONS COULD INCLUDE:

Security: Maintain a safe, comfortable environment for everyone participating in the festival/event, as well as securing all venues.

Environment: Help ensure that the site is kept looking beautiful for visitors to the festival/event. Equipment and materials are provided to help dispose of waste/garbage and sort recyclables.

Front-of-House: Handle line-ups and answer questions about the festival/event for indoor and outdoor seated venues, take tickets and assist with seating. Good organization skills are required and you should enjoy working with the public.

Food Services: Help with the set up, service and dismantling of the temporary restaurant serving food and beverages.

Beer Garden: Jobs include bar, table service, set up and dismantling.

Information: Their business is to know everything there is to know about the festival/event – who, what, when, where, why and how is. They also sell merchandise and provide programs to visitors to the festival/event.

Children’s Activities: Enjoy some time entertaining children and their parents. Activities and games will be provided for everyone coming to this area. Help make this place an enjoyable experience.

Office: Duties will include answering telephone inquiries about the festival/event, selling seats to the ticketed events and general office duties. Good communication and verbal skills are required.

Production/Site: Help the Production/Logistics Coordinator ensure the physical site is up and operating smoothly. From erecting tents to securing banners and putting up fencing, it is important that you are physically fit and ready for any emergency.

Stage: All volunteers who are helping with any theatrical/musical productions must have some previous training and/or understanding of stage/backstage procedures.

Marketing & Media: Working with the coordinator, volunteers will be administrative assistant(s) for pre, during and post festival/event. This position will require the volunteers(s) to provide media guests with information, directions and help with any media-related jobs.
### SAMPLE VOLUNTEER COORDINATOR SCHEDULE - ONE WEEK OUT

<table>
<thead>
<tr>
<th>DATE</th>
<th>VENUE</th>
<th>COORDINATORS/ VOLUNTEERS</th>
<th>REQUIREMENTS</th>
<th>NOTES</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sept 26th - 7:00 pm</td>
<td>Arena Event Security</td>
<td>Coordinator X &amp; 20 Volunteers</td>
<td>20 volunteer info packages</td>
<td>Make sure coordinators cover procedure for lost children and emergency procedures and phone numbers</td>
</tr>
<tr>
<td>Sept 27th - 6:30 pm</td>
<td>Library Meeting Rm # 1</td>
<td>Coordinator X &amp; 16 Volunteers</td>
<td>16 volunteer information packages</td>
<td>Reminder to pick up brochures at office</td>
</tr>
<tr>
<td>Sept. 28th - 7:30 pm</td>
<td>Library Meeting Rm # 1</td>
<td>24 Coordinators</td>
<td>Take site map, left over volunteer packages, program schedule</td>
<td>Distribute staff IDs, T-shirts, and contact name tags; Reminder of volunteer rally</td>
</tr>
<tr>
<td>Sept. 29th - 7:00 pm</td>
<td>Arena Volunteer Rally;</td>
<td>100 volunteers + coordinators</td>
<td>All materials for coordinators; last meeting before event; Materials about festival/event to library</td>
<td>Who hasn’t shown up to any meetings?</td>
</tr>
<tr>
<td>Sept. 30th -</td>
<td>Office</td>
<td></td>
<td>Call coordinators with new volunteer information</td>
<td></td>
</tr>
<tr>
<td>10:00 am</td>
<td>Call volunteers on waiting list to fill gaps</td>
<td></td>
<td></td>
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</tr>
<tr>
<td>Oct. 1st - 9:00 am</td>
<td>Conduct a site walk with Production/Logistics Coordinator</td>
<td></td>
<td>Charge cell phone Load in begins 7 am</td>
<td></td>
</tr>
<tr>
<td>Oct 2nd - 11:00 am</td>
<td>Show time</td>
<td></td>
<td>Turn cell phone</td>
<td></td>
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</tbody>
</table>
EVALUATION
There are a number of options for assessing the success of the volunteer program:

• Tracking the number of volunteers participating in every venue will determine if you reached the number of volunteers you wanted for the festival/event.
• Monitoring to see how well the venue is running.
• Ask volunteers who attend the recognition event, or through an email request, to provide you with feedback about their experiences.
• Ask volunteers if they would be interested in volunteering in future years.
• Have final report forms for your coordinators to fill out and share at a wrap meeting.
• Review Area Needs Assessments with coordinators for changes in volunteers needed.

VOLUNTEER COORDINATOR’S PRE-EVENT CHECKLIST
❑ Have you reviewed the number of volunteers needed with each area coordinator?
❑ Are all coordinators clear on their roles, the chain of command, job descriptions for volunteers and the rules and regulations governing volunteers at the festival/event?
❑ Have all the volunteers filled out applications and the release of private information document? Have you completed background checks on volunteers working in with cash or children?
❑ Are all coordinators providing a training and orientation for their volunteers prior to the festival/event?
❑ Have volunteer packages been put together including their schedule, ID, program and other pertinent information?
❑ Have you developed a volunteer appreciation event?

PLANNING AND ORGANIZING A VOLUNTEER PROGRAM TAKES TIME, SKILLS AND A GOOD UNDERSTANDING OF YOUR COMMUNITY. BEGIN DEVELOPING A VOLUNTEER DATABASE IMMEDIATELY. RECORD ALL POSSIBLE OPTIONS FOR VOLUNTEERING, START A TIMELINE FOR CRITICAL DATES AND DEADLINES. REMEMBER IT IS JUST AS IMPORTANT TO MANAGE VOLUNTEER EXPECTATIONS AS IT IS YOUR PARTICIPANTS—BE SURE TO EFFECTIVELY COMMUNICATE ROLES AND RESPONSIBILITIES BEFORE POSITIONS ARE ASSIGNED.
USEFUL RESOURCES

I. The Volunteer Alberta website is a good place to acquire information on all aspects of volunteer management
   http://www.volunteeralberta.ab.ca

II. For information regarding legal obligations and volunteers see, Volunteer Canada,
    http://www.volunteer.ca/content/volunteering-and-law

III. If there are not enough volunteers applying from inside the community, you may want to consider other volunteer websites in the province such as
    http://www.volunteeralberta.ab.ca/services/people/volunteer-opportunities/
TOOLS FOR...

A. RESOURCE NEEDS ASSESSMENTS
B. SETTING TIMELINES
C. SCHEDULING
D. FINAL REPORT
INTRODUCTION

In the initial phase of planning, needs assessment is crucial to budgeting and estimating manpower. At all stages, in the planning process, time scheduling is essential.

From the earlier discussions in assigning roles and responsibilities in PART 1, it is evident that producing a time line will help keep everyone on track and identify gaps. Every action must have a time/deadline placed on it, whether it is applying for grants or having a production meeting.

The examples and templates provided in this section are specific to certain coordinator functions. In PART 2 there were examples of timelines, checklists and schedules for some areas. These can also be referred to. There may be many more or fewer items to add depending on your area of responsibility and size and complexity of your festival/event. The bottom line is to ensure everything you need to do is properly assessed ahead of time, is captured on a timeline and a person is assigned to get it done.
A. RESOURCE NEEDS ASSESSMENT - BUDGET/VOLUNTEERS/EQUIPMENT

Everyone from the Chair to the Coordinator of Entertainment and Activities will have requirements. The assessment of these needs and the allocation of the resources for these requests are not only critical to the successful operation of your festival/event, but also an important element of the objectives you hope to achieve. The resource needs assessment looks at equipment, décor, budget and volunteer requirements.

For example, if the theme of the festival/event were a science fair, a good percentage of the cash would go to the scientific aspects of the programming. If music is the focus, a greater portion of the budget will go to acquiring acts. Or if the festival/event’s objective is to provide a forum to highlight opportunities in your community to retain or gain citizens, then more budget may be allotted to the marketing of the festival/event outside of the community.

The objectives of a needs assessment are to:

- identify the overall festival/event needs
- determine the individual area needs
- establish the priorities of the needs
- respond to the gaps

List your needs from an organizational perspective. For example, the planning committee wants to take a page from Shakespeare’s “A Midsummer Night’s Dream” and create a fantasy forest for their classic theatre series “Shakespeare Under the Stars.” They want the site to be transformed into a magical environment. How many twinkle lights are needed? Who will build props? Where will you get park benches and willow archways? How many volunteers will be needed? What will need to be rented?
STEPS IN A RESOURCE NEEDS ASSESSMENT

1. Identify your committee’s overall needs and priorities.

2. What are the committee’s priorities for the allotment of resources?

3. An analysis of the objectives of each area will help determine the resources required. To illustrate, the Children’s Area Coordinator has decided that all the activities will be set up like play stations with a central area for everyone to assemble to enjoy performances. How many tables and chairs are required? Is there enough space? What audio equipment is needed?
4. Analyze and determine the equipment, decorations, etc. needed and then develop the budget addressing what needs to be purchased, rented or could be donated. (Refer to Budget Template on page 108)

5. Breakdown your areas of responsibility and determine the number of volunteers that will be required and for how many hours a day. Include set-up and tear down time when determining volunteer hours.

The act of writing down all the needs for the festival/event will encourage your committee to engage in some creative thinking to generate strategies to get the resources needed. If money is not available to buy something, what can you do to get it?
BUDGET TEMPLATE

Each area coordinator should initially prepare their own budget itemizing all of their anticipated expenses. Then these budgets should be compiled into the master budget for the festival/event.

It is important to assign a dollar value to in-kind donations (both materials and time) as granting agencies will often recognize in-kind donations when determining the matching grant amount.

Not all of these items will apply to every festival/event. Create your estimated budget by using the list below and add any other costs you can think of to produce your area budget.

<table>
<thead>
<tr>
<th>REVENUE</th>
<th>AMOUNT</th>
<th>GST</th>
<th>TOTAL</th>
<th>IN-KIND VALUE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Corporate Donations</td>
<td></td>
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<td></td>
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<tr>
<td>Government Grants</td>
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<tr>
<td>Foundation Grants</td>
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<tr>
<td>Private Donations</td>
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<tr>
<td>Local Business Donations</td>
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<tr>
<td>Raffle Revenue</td>
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</tr>
<tr>
<td>Vendor Fees</td>
<td></td>
<td></td>
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<tr>
<td>Program Ads</td>
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<tr>
<td>Ticket Sales</td>
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<tr>
<td>Merchandise Sales</td>
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<tr>
<td>On Site Fundraising</td>
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<tr>
<td>Casino</td>
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<tr>
<td>Bingo</td>
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<tr>
<td><strong>TOTAL</strong></td>
<td></td>
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**EXPENSES**

**ADMINISTRATION**

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<tbody>
<tr>
<td>Accounting &amp; Audit</td>
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<tr>
<td>Bank Charges</td>
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<td></td>
</tr>
<tr>
<td>Equipment Purchase</td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>Equipment Maintenance</td>
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<tr>
<td>Insurance</td>
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<tr>
<td>Postage</td>
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<tr>
<td>Office Supplies</td>
<td></td>
<td></td>
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<td></td>
</tr>
<tr>
<td>Category</td>
<td>Subcategory</td>
<td>Notes</td>
<td></td>
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<td>----------------------------------</td>
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<tr>
<td>Rent</td>
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<tr>
<td>Telephone</td>
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<tr>
<td>Utilities</td>
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<tr>
<td>WCB</td>
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<tr>
<td>Cash Boxes</td>
<td></td>
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<td>Miscellaneous</td>
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<td><strong>STAFF</strong></td>
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<td>Contractors</td>
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<td>Summer Staff</td>
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<td>Assistants</td>
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<td><strong>MEDIA RELATIONS/PROMOTION</strong></td>
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<td>Design Fees</td>
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<td>Media Conference</td>
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<td>ID Tags Media/Volunteer/Staff</td>
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<td><strong>FOOD AND BAR SERVICES</strong></td>
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<td>Coordinator (Summer Staff)</td>
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<td>Tent Rental</td>
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<td>Venue Rental Fees</td>
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OTHER TIPS FOR THE RESOURCE NEEDS ASSESSMENT

1. Think of ways to cut costs. Would the local high school have the equipment to make your signage for less? Would local artists volunteer their time to help with décor?

2. What is the seating capacity and number of people that could be served over 10 hours? How many days? This could also apply to the bar, food vendor seating area, outdoor performance area, etc.

3. Are there any special requirements that need to be calculated into the budget such as hospitality for performers? Seating for VIPS at a venue?

4. How does your budget compare to the overall projected budget that may have been established for your area?
THIS CHECKLIST WILL HELP TO GUIDE YOU THROUGH A NEEDS ASSESSMENT:

- Analyze and review all information about festival/event needs and area needs
- Conduct a site and venue walk to survey all facilities
- Communicate with all planning and implementation participants in the festival/event
- Develop needs list
- As a group review needs lists, discuss strategies for acquiring resources and cutting costs
- Identify possible people and places to obtain resources
- Finalize needs list and agree on the allocation of equipment, materials, services and human resource needs
- Organize the information on a master timeline and individual timelines/schedules
- Report on progress at festival/event meetings
- Communicate between meetings via phone or email to discuss issues
- Complete a final check of all areas prior to the festival/event
B. SETTING A TIMELINE

Seven steps have been identified to help develop an effective timeline:

1. **Focus your thoughts**: Using your designated role and responsibility write down what it is you want to achieve with the time allotted.

2. **Prioritize**: Having all the information from the resource needs assessment, you can begin to break down the actions into achievable steps on a timeline. What are the most important components to work on immediately?

3. **Manage your time**: Schedule regular meetings with your sub-committee and volunteers. Delegate tasks and empower the coordinators to handle their areas.

4. **Problem solve early**: You’ve plotted your tasks on the timeline and begun planning. If some schedules or other requests contradict, how will you resolve this dilemma?

5. **Research all possible sources for your requirements**: Talk with everyone in the community. Find out who has what and if they will let you borrow, rent at a discounted price or have them donate it to the festival/event. Contact other festivals/events in and around your community to source more equipment and materials. For example, would your school, town, theatre group and community centre have resources you can use? Will the town and local business provide in-kind support?
6. **Assemble all dates, locations, times and contacts on the timeline:** Put everything in chronological order and indicate priority areas. Determine how much time each step will take, how many people you will need, where the resources are coming from and how you’re going to get them.

7. **Review:** Place dates on your timeline for an overall review of the steps and the objectives. Speak with sub-committee members about their progress and any gaps in Completion of their tasks.

*REMEMBER THAT COMMUNICATION IS THE KEY TO GENERATING AN EFFECTIVE FESTIVAL/EVENT TIMELINE AND A DAILY OR MONTHLY SCHEDULE. PRODUCING GOOD REPORTS FROM INFORMATION GATHERED FROM YOUR TIMELINE FOR YOUR FESTIVAL/EVENT MEETINGS MAKES IT EASIER TO IDENTIFY CONCERNS OR GAPS, AND GIVE YOU A SENSE OF ACCOMPLISHMENT WHEN A TASK IS COMPLETE. FURTHER, IF EVERY COORDINATOR IS ON THE SAME PAGE IN TERMS OF HAVING A TIMELINE IN PLACE, DISCUSSIONS, PROBLEM SOLVING AND RESOLUTIONS CAN BE MUCH MORE PRODUCTIVE.*
This sample of an event timeline illustrates a monthly timeline for a Vendor Coordinator:

SAMPLE MONTHLY FESTIVAL/EVENT TIMELINE FOR FOOD, ARTS & CRAFTS VENDOR
(Festival/Event Date August 5th)

<table>
<thead>
<tr>
<th>DATE</th>
<th>TASK</th>
</tr>
</thead>
</table>
| Early March Mid-March Late March | • Source possible vendors in community  
|              | • Chat with Farmer's Market manager, craft fair organizer, Arts council, invite representatives to form committee  
|              | • Begin database of potential vendors  
|              | • Determine criteria for vendors (all Arts & crafts must be locally produced)  
|              | • Chat with Production Coordinator about site capacity, number of potential visitors, facilities and placement  
|              | • Call Capital health about permits and applications for vendors  
|              | • Set inspection date |
| Early April Late April | • Create vendor application & rules and regulations  
|              | • Send out invitations and/or advertise for vendors |
| Early May Late May | • Prepare information sheet for vendors including all policies, rules & regulations  
|              | • Load in and out dates and times  
|              | • Festival hours of operation  
|              | • Create site map and place vendors  
|              | • Confirm with production crew where power and water and waste disposal is to be situated |
| Early June Late June | • Confirm vendors by letter stating fees are due with proof of insurance mid-July  
|              | • Plot approved vendors on map and assign them a number A1 (Arts) C1 (Crafts) F1 (Food)  
|              | • Develop payment schedule  
|              | • Fill out applications and have vendor sign when paying fees |
| Mid-July | • Set payment schedule with vendors  
|              | • Provide information, map, and receipt for fees and damage deposit with proof of insurance |
| Late July | • Contact all vendors to review load in date and time |
| August 4th | • Mark vendor spots with washable paint or chalk |
| August 5th | • Be available for load in |
| Post-event | • Be available for load out  
|              | • Make notes on database regarding any issues with vendors  
|              | • Assess the success of the vendor program through number of vendors participating, their feedback of their experience, monitoring the vendor area and the response of the audience |
C. SCHEDULING

The schedule provides the detail for when and where services, equipment and materials need to be picked up or delivered and all the details about pick up/delivery. Each area coordinator should develop a detailed schedule. These schedules should be provided to the Production/Logistics coordinator. Use the chart below as a model to fill in a daily/monthly calendar that will go to the Production/Logistics Coordinator and any crew helping.

**FESTIVAL/EVENT KITCHEN MONTHLY SCHEDULE**

<table>
<thead>
<tr>
<th>CONTACT</th>
<th>DATE</th>
<th>ITEM</th>
<th>VENUE</th>
<th>DELIVERY</th>
<th>NOTES</th>
</tr>
</thead>
<tbody>
<tr>
<td>Contact Production/Logistics Coordinator about pick ups X Rental 1234 Main St Contact: Bob Phone: 780-456-7891</td>
<td>August 3rd Pick up @ 10:00 am</td>
<td>300 Tables &amp; Chairs</td>
<td>To Community Hall</td>
<td>Loading dock, North end of hall, will be unlocked 2 volunteers available to help</td>
<td>Do inventory as it is unloaded and have them sign it off</td>
</tr>
<tr>
<td>Z Printers 5678 Main St Contact: Sue Phone: 780-123-4567</td>
<td>August 3rd Pick up signs @ 4:00 pm</td>
<td>2 x 4’ x 6’ Menu signs 6 x 2’ x 2’ Directional Signs</td>
<td>To Community Hall</td>
<td>Front doors will be open, bring into storage room on 2nd level by the stage</td>
<td>Z Printers is sponsoring 50% of the cost, they may send along the invoice. Please deliver it to Financial Manager at office.</td>
</tr>
<tr>
<td>Y Grocery 9012 Main St Contact: Adam Phone: 780-323-5578</td>
<td>August 4th Pick up dry goods for baking</td>
<td>Should be 2 flats of items, Checklist will be with me at the hall</td>
<td>To Community Hall</td>
<td>Use loading dock</td>
<td>Invoice should state value, of all items donated, invoice to be taken to the financial manager</td>
</tr>
</tbody>
</table>
### SAMPLE PERFORMANCE SCHEDULE FOR ONE VENUE

<table>
<thead>
<tr>
<th>TIME</th>
<th>ACTIVITY</th>
<th>ACT</th>
<th>VENUE</th>
<th>VENUE CONTACT</th>
<th>ADDITIONAL REQUIREMENTS</th>
<th>CAPACITY</th>
</tr>
</thead>
<tbody>
<tr>
<td>11:00-11:45</td>
<td>Rehearsal</td>
<td>Mr. Bobblehead</td>
<td>Arena</td>
<td>Venue Manager:</td>
<td>Number of Volunteers:</td>
<td></td>
</tr>
<tr>
<td>11:45-12:00</td>
<td>Rehearsal</td>
<td>Rock Band</td>
<td>Arena</td>
<td>Venue Manager:</td>
<td>Number of Volunteers:</td>
<td></td>
</tr>
<tr>
<td>12:00-12:45</td>
<td>Rehearsal</td>
<td>Mr. Bobblehead</td>
<td>Arena</td>
<td>Venue Manager:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>12:45-1:30</td>
<td>ACT Change Over</td>
<td>n/a</td>
<td>Arena</td>
<td>Venue Manager:</td>
<td>Number of Volunteers:</td>
<td>250</td>
</tr>
<tr>
<td>1:30-2:30</td>
<td>Live show</td>
<td>Mr. Bobblehead</td>
<td>Arena</td>
<td>Venue Manager:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2:30-3:00</td>
<td>ACT Change Over</td>
<td>n/a</td>
<td>Arena</td>
<td>Venue Manager:</td>
<td>Number of Volunteers:</td>
<td>n/a</td>
</tr>
<tr>
<td>3:00-4:30</td>
<td>Live show</td>
<td>Rock Band</td>
<td>Arena</td>
<td>Venue Manager:</td>
<td>Number of Volunteers:</td>
<td>250</td>
</tr>
</tbody>
</table>
D. FINAL REPORT

Coordinator:__________________________________________________________

Contact Information:____________________________________________________

Please provide any change of personal information such as a new email address, work number, new home address, cell number

Phone: (   ) Cell: (   )

Assistant:______________________________________________________________

Phone: (   ) Cell: (   )

SUCCESSES
1. _________________________________________________________________
2. _________________________________________________________________
3. _________________________________________________________________
4. _________________________________________________________________

RECOMMENDATIONS
1. _________________________________________________________________
2. _________________________________________________________________
3. _________________________________________________________________
4. _________________________________________________________________

CHALLENGES
1. _________________________________________________________________
2. _________________________________________________________________
3. _________________________________________________________________
4. _________________________________________________________________

NEEDS LIST (for next year)
1. _________________________________________________________________
2. _________________________________________________________________
3. _________________________________________________________________
4. _________________________________________________________________

Number of Volunteers:________________________________________________

Number of No-Shows: ___________________________ Names: ___________________________ Why

____________________________________________________________________

____________________________________________________________________

____________________________________________________________________

Please print or type (use back if necessary)

Further Comments:____________________________________________________

Signature:____________________________________________________________

Coordinator:________________________________ Date:___________________
ASSESSMENT RECORD

Committee: ____________________________
Chair/Coordinator: _____________________
Contact Information: ___________________
Day(s) & Time of Operation: ______________
Venue: _________________________________
Program: ______________________________
Target Group: __________________________
# Target Group Reached: _________________
Sponsors (Cash & In-kind): _______________
Revenues Generated: ____________________
Total Expenses: _________________________

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<thead>
<tr>
<th>PERSONNEL</th>
<th>HOURS</th>
<th>TASKS</th>
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<tbody>
<tr>
<td>Chair:</td>
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<tr>
<td>Co-chair:</td>
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<tr>
<td>Volunteers:</td>
<td>Number:</td>
<td>Total Hours:</td>
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INTRODUCTION

A strategic plan is an essential tool for organizations to build and enhance your festival/event for future years. A long-term work plan process should include:

- refining your vision and mission
- reassessing the values of your organization
- identifying the strengths, weaknesses, opportunities and threats (SWOT Analysis)
- determining adjustments to the committee structure
- developing initiatives to maintain, sustain and recruit new committee members and volunteers
- prioritizing an action plan
- setting indicators for assessment and success

In essence, strategic planning takes a look at the festival/event through monitoring, reviewing, evaluating and then making any necessary changes. Whether you’re a first time festival/event or have been in operation for several years, don’t put off or ignore strategic planning; it is an essential building block for long-term sustainability and growth.
EVALUATING YOUR FESTIVAL/EVENT

SWOT Analysis

SWOT is a tool used by the business sector to determine Strengths, Weaknesses, Opportunities and Threats to promote success. It is also an effective means of analyzing the internal and external workings of a festival/event.

As an analysis tool, SWOT can be very helpful in guiding the decisions that are made regarding the maintenance, growth and sustainability of the festival/event.

You should conduct a SWOT on your overall festival/event as well as having each Coordinator conduct one on their individual area. Here are a few you might want to examine and include.

- How well did the Committee work through the planning process?
- How well did the programming reflect the objectives of the festival/event? Did the programming reflect the vision and mission?
- How effective was the programming in achieving the objectives? What outcomes were achieved? What outputs occurred?
- How effective were the Coordinators in their roles and responsibilities? For example, did they regularly attend meetings? Submit informative reports?
- What were the dynamics of the Committee? Did everyone agree on the objectives? Were the members prepared to fully participate in the planning and the delivery of the event?
- How accurate were the projected budget figures?
- How well were the resources allotted, and were there enough?
- What decisions can be made based on the outcomes?

A sample SWOT test follows on the next page. The intention of this sample is to provide you with an idea of how to approach an analysis of your festival/event committee, but is not to be considered a comprehensive analysis.
### SAMPLE OF A SWOT TEST ON THE COMMITTEE OPERATIONS

<table>
<thead>
<tr>
<th>ITEM</th>
<th>STRENGTHS</th>
<th>WEAKNESSES</th>
<th>OPPORTUNITIES</th>
<th>THREATS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Strategic Planning</td>
<td>Several committee members have previous experience.</td>
<td>Some members were hesitant about agreeing on the objectives but did not provide any options.</td>
<td>Continue to look for members who can commit fully to the development and implementation of the festival/event.</td>
<td>If too much time is spent going over objectives members become disengaged.</td>
</tr>
<tr>
<td>Programming</td>
<td>The vision &amp; mission of the event were evident as the quantitative &amp; qualitative data suggests.</td>
<td>There were too many events for the first year. Feedback suggests that the audience were overwhelmed with choices.</td>
<td>Fine-tune the programming to meet the community's needs and the festival's/event's objectives.</td>
<td>Elimination of a program could reduce market appeal</td>
</tr>
<tr>
<td>Outcomes</td>
<td>The feedback from the business community indicates that they were pleased with their exposure on the site.</td>
<td>The site seemed to be cluttered with sponsor signage.</td>
<td>Revisit the Sponsorship program to see how the sponsors can be recognized without compromising the aesthetic of the site.</td>
<td>Changing sponsorship recognition could alienate some of the business community.</td>
</tr>
<tr>
<td>Outputs</td>
<td>The number of volunteer staff was reached.</td>
<td>There is a transitory nature to the community and many of the volunteers may not be available next year.</td>
<td>During the year, develop strategies to hold and bring in new volunteers.</td>
<td>Many young people are leaving the area for school and jobs.</td>
</tr>
<tr>
<td>Committee Member Effectiveness</td>
<td>There were several members who went the extra mile to make things happen.</td>
<td>Some members missed, and were unprepared for meetings.</td>
<td>Review the roles and responsibilities of the committee members with the intent of instilling a desire to help the organization succeed in its objectives.</td>
<td>The public image of the committee could be compromised if we appear incohesive.</td>
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SWOT TEST TEMPLATE

All are coordinators should conduct the SWOT test, and present it to the planning committee.

<table>
<thead>
<tr>
<th>ITEM</th>
<th>STRENGTHS</th>
<th>WEAKNESSES</th>
<th>OPPORTUNITIES</th>
<th>THREATS</th>
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Information gathered through this evaluation will guide your decisions regarding the improvement of the internal and external operations of the festival/event towards a better structure that will not only sustain but aid in the growth of your festival/event over time.

In addition to the SWOT analysis, the planning committee should evaluate and document changes to the following areas of the festival/event:

1. **Review Evaluation Reports**: Each coordinator should prepare an evaluation report (Part One, Section E). The Committee should review and discuss these reports to compile a list of recommendations for the next year’s festival/event.

2. **Review Vision and Mission Statements**: Now that you’re festival/event is completed, it’s important to take a look and re-evaluate your Vision and Mission Statements. Do they need to be adjusted or tweaked to more clearly define the goal(s) of your festival/event? Will your goal(s) for next year be different is some how? How will this affect your Vision and Mission Statements?

3. **Review Theme**: Did the theme resonate with the audience? Did the programs complement the theme or detract from it? Did all components of the festival/event build on the theme? Where could improvements be made?
4. **Review Organizational Structure**: What changes would you make to the committee structure? Would you add more members to the committee? Would you seek more specialized skills in your coordinators?

5. **Review Target Audience**: Did you attract the markets/audience you targeted? Would you expand your market appeal or more clearly target your market next year? Do you want to expand beyond a community festival/event to a regional or provincial festival/event?

6. **Review Entertainment and Activities**: What changes or additions would you make to the program in response to the audience/market you want to attract? What changes would you make to the program based on evaluation survey results? What changes would you make to the program to better reflect the theme?

7. **Review the Length of Your Festival/Event**: Should you expand the number of days of the festival/event or change the date for next year?

8. **Review the Production/Logistics**: What production/logistic changes should be made? Is a different venue required? Are some adjustments in the layout required? Was the equipment sufficient? What additions or changes would you make to the facilities used?
9. **Review Media Relations/Promotion Activities:** What changes would you make to the media relations/promotion activities? Were you effective at attracting media interest and did it help in the promotion of your festival/event? Where could you obtain additional free promotion? How could you target your promotion to reach your audience/market?

10. **Review Sponsorship/Fundraising:** Are there new funding sources/grants that you could apply for next year? When is the deadline for application? Did your sponsors feel they received sufficient recognition? Are there additional business/sponsors that could be approached next year?

11. **Review Volunteer Program:** Did you have enough volunteers? In what program areas were additional volunteers needed? Would you make changes to the volunteer orientation and training? What other sources of volunteers could be tapped for next year’s festival/event?

12. **Review Budget:** How accurate were the projected budget figures? Was the budget sufficient and would the budget need to be increased next year?

*NOW THAT YOU HAVE REVIEWED YOUR FESTIVAL/EVENT, IT’S IMPORTANT TO DOCUMENT ALL THE CHANGES AND SHIFTS BEING RECOMMENDED FOR NEXT YEAR’S FESTIVAL/EVENT. ALTHOUGH THERE IS ALWAYS ROOM FOR IMPROVEMENT, DON’T OVERLOOK CELEBRATING YOUR SUCCESSES. AFTER THE WORK IS DONE AND THE EVALUATION COMPLETE, THINK ABOUT WAYS THAT YOU CAN GET YOUR TEAM TOGETHER TO THANK THEM FOR ALL OF THEIR SUPPORT AND START GETTING EXCITED ABOUT PLANNING FOR A BIGGER AND BETTER FESTIVAL/EVENT NEXT TIME!*
USEFUL RESOURCES FOR PART FOUR

XI. For further information on strategic planning see the Free Management Help Library at http://www.managementhelp.org/strategicplanning/index.htm

XII. There are many different approaches to evaluation that can be found at the Free Management Library www.managementhelp.org;

XIII. Further information on effective board governance can be found at the Alberta Culture and Tourism site at http://www.culture.alberta.ca/community/programs-and-services/board-development/
