

Community Festivals and Events Planning Guide



Photo Credit: Chris Robart

Richmond Hill

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INTRODUCTION

Richmond Hill facilitates and supports the delivery of vibrant and sustainable festivals and events that engage the community in event leadership, enhance the quality of life for its residents, build community pride and provide opportunities and places for people to connect and celebrate local culture, heritage, and talent. The intent of this manual is to provide a resource to guide organizers through the various stages involved in planning a new festival or event. It is not meant to be a comprehensive guide, but rather provide the basic elements to get you started. There are a myriad of resources available in print and online to facilitate the planning process including Richmond Hill's Community Festivals & Events Resource Manual and Community Festivals & Events Planning Toolkit.

Planning a Festival or Event in Richmond Hill

In order to host a festival or event on municipal property, a permit must be issued. The lead-time for a permit to be issued is contingent on a number of variables including:

- Number of attendees
- Festival or event location(s)
- Planned activities
- Equipment and resource requirements
- Number of Town services required

Depending on the size and scope of the festival or event, Organizers are required to complete and submit a Community Festivals & Events Application Form before a permit can be issued. The application is required for all festivals and events that are grander in scale. That is, the festival or event is expected to attract more than 1,000 attendees, is open to the public, involves the use of outdoor space and impacts two or more municipal departments. In order to determine whether a Community Festivals and Events Application is required, Organizers should refer to the [Festival and Event Booking Flowchart](#).

If a Community Festivals and Events Application is required, it must be submitted by **March 1 - for festivals or events taking place July to December of the same year or September 1 - for festivals or events taking place January to June of the following year.**

Applications can still be remitted following the deadline date, provided that the application is submitted a minimum of **90 days prior** to the start of the proposed festival or event. Organizers looking to host a private event or meeting can visit the [Facility Booking Page](#) on the City's website for more information regarding facility permits or to complete the online [Facility Rental Permit Form](#).

To facilitate the planning process, Organizers are encouraged to review the Community Festivals & Events Resource Manual in its entirety as it includes pertinent information regarding requirements that are specific to Richmond Hill and links to the tools required for the delivery of a safe and successful festival or event.

For more information about hosting a festival or event in Richmond Hill, please email Events Services or call 905-771-2424.



Photo Credit: Chris Robert

HOW TO GET STARTED

Developing the Concept

Moving your festival or event from initial concept to execution requires an understanding of the interests, diversity and trends of the community. It is important to communicate with stakeholders, area residents and community leaders about your idea and to find people who will help turn your idea into a feasible festival or event. It is important to assess your capacity to organize a festival or event; to identify the objectives of the festival or event; the potential theme; and the desired outcomes. Organizers must develop a strategy to maintain and sustain the festival or event; create a timeline for the actions needed to initiate and plan the festival or event; recruit support; establish individual roles and responsibilities; determine the resources needed; and last but not least, develop tools to assess your festival or event and make the appropriate changes to carry it into the future.

Determining Goals and Objectives

After surveying the community for interest, ideas and recommendations, begin to develop statements outlining what the festival or event objectives are going to be and how to achieve them.

These goals and objectives may include:

- Strengthening community identity and spirit
- Providing a venue for local artists and artisans to showcase and sell their products
- Creating awareness and appreciation of the culture and heritage of the community
- Improving the local economy
- Acquainting the local and outside community to the unique opportunities within your community
- Achieving attendance targets
- Raising funds for a local charitable organization
- Celebrating significant cultural traditions
- Creating a tourist destination

Drafting Vision and Mission Statements

Take time to develop both vision and mission statements through discussion of the objectives, goals, outcomes and anticipated growth.

A Vision Statement outlines the ultimate goals and objectives of your festival or event (its purpose and value).

A Mission Statement outlines the strategies for achieving the goals and objectives of your festival or event (measuring success).

Developing vision and mission statements will help to determine the direction the festival or event is going to take. Time must be spent discussing the value of the festival or event to participants, stakeholders and the public. What benefit will be gained? What impact on the community is expected or hoped for? In addition, Organizers must outline the tactics to be utilized to achieve their vision and fulfill the mission of the festival and event.

Part of the evaluation process of the festival or event will be to review the goals and decide if the outcome of the festival or event is what was expected and if this reflects the vision and mission statements. Changes to the vision and mission statements may occur as the festival or event evolves.

Clarification of your vision and mission will help to:

- Define ultimate goals and objectives
- Identify the purpose
- Identify values
- Develop strategies and tactics to achieve these goals and objectives

Selecting an Executive Board and/or Organizing Committee

Whether the festival or event is large or small, an Executive Board or Organizing Committee must be established to ensure the goals and objectives are met.

Some boards deal directly with the management of the festival or event while others serve in an advisory capacity. For smaller festivals or events, the board may do both. Typically, executive boards of festivals or events such as carnivals, festivals or sporting events will in turn need to establish organizing Committees. The number and types of committees will depend on the complexity and size of the festival or event. As the festival or event grows, staff or volunteers may need to be recruited to assist with the operations.

For smaller festivals or events, it is common for board members to assume both board and committee work. It is important that Board and/or Committee volunteers understand the full scope of their responsibilities. Executive Boards deal more with developing policy and setting direction for volunteer committees and staff. They perform “ends to be achieved” functions. Working Committees are more involved with “means to end” functions such as operational duties and “how it’s done” tasks.

Getting the right people for the right roles is probably the most important factor in successfully developing a Board. Spending some time in the early stages of your planning process to conduct a Board skills analysis will help identify the type of people or skills required.

Try to recruit individuals who share the same philosophy, are in agreement with the goals and objectives, and have adequate time to contribute. Avoid recruiting through high-pressure tactics.

Choosing the Event Lead and Members of the Board and/or Organizing Committee

When choosing individuals to take leadership roles for your festival or event, it is important to recruit people who have experience as well as energy and enthusiasm for the project. Some attributes to consider when choosing a leader include:

Personal Qualities:

- Has the capacity to commit to the time requirements
- Has strong leadership qualities
- Commitment to the vision and mission of the festival or event
- Will act in the best interests of the festival or event
- Will be a good ambassador for the festival or event
- Works well with a team
- Has good communication skills

Background/Skills:

- Committee experience
- Volunteer experience
- Festival or event planning experience
- Has experience related to the roles and functions of the festival or event (e.g. music, sports, sponsorship development, accounting, etc.)

Whether the Organization becomes a not-for-profit organization with a Board of Directors or an organizing committee with sub-committees, it is important to develop a plan of action for the governing group and every member. Refer to page 8 for more information about becoming an incorporated or charitable entity.

Board of Directors and Organizing Committee Executive Roles

A sample description of four board/committee roles is outlined below. Considering having at least an additional four members to help with the organizational management of the festival or event.

1. The **Chair** guides the members through:

- Policymaking
- Strategic planning
- Decision-making
- Service on all committees (if required)
- Compliance to all laws
- Assisting with the planning of meetings, including the preparation of agendas and minutes
- 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 to the membership and succession planning
- 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 Board.

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

4. The **Treasurer** reports on the financial status of the Organization.

Functional Components of Festival and Event Planning

There are eight key areas which need to be managed throughout the festival or event planning process. Smaller festivals or events may have committee members overseeing more than one function, e.g. fundraising and sponsorship, but as the festival or event grows, each area will require a dedicated coordinator, and possibly, a sub-Committee of volunteers to support the function.

1. **Overall Management of the Festival/Event** – For new or developing festivals/events, it is common for the Chair to take responsibility for overseeing each of the key areas to ensure success. This individual will be responsible for keeping the committee sub-chairs accountable, on target and on schedule. It is this position's responsibility to ensure that the Board and/or Committee clearly understands the vision and mission and are working towards a common goal. This position is also responsible for managing the critical path for the festival or event. Should a festival or event develop to the point where an Event Manager is hired, the Manager would assume this responsibility and be accountable to the Board and/or Organizing Committee. In addition to the Chair, the Vice Chair, Secretary and Treasurer are vital to the management of the festival or event. Their involvement is critical to the functions outlined below:

2. **Financial Management** – The task of looking after the finances of the festival or event is the Treasurer's responsibility. Larger festivals and events may wish to consider hiring an accountant or bookkeeper to manage 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.

3. **Fundraising** – New festivals or events may want to do some pre-event fundraising to generate operating revenue during the planning stage. For those festivals or events having operating for several years, fundraising throughout the year may be a lucrative means to supplement revenue.

There are different forms of fundraising including researching and applying for grants, obtaining corporate sponsorship or undertaking specific fundraising activities such as the sale of specialty goods, raffles and auctions.

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 or event. It is not wise to rely on government

or foundation money as the only source of revenue and the goal should be to operate without them in the long term. Organizers should strive to create a self-sustaining model.

- 4. 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.

The Board and/or Organizing Committee can aid in developing prospects by suggesting potential sponsors from the community and providing guidance regarding the components of the festival or event to be sponsored. The person in charge of this area will develop a list of potential sponsors; letter of solicitation; levels of sponsorship including benefits and recognition; provide sponsors with activation ideas and support their efforts; ensure that they are appropriately thanked; and communicate with the sponsor throughout the planning cycle.

- 5. Media and Promotion** – The Board and/or Organizing Committee can offer direction on how to promote the festival or event and whether an advertising campaign is required to support the efforts. Try to find a committee member who is skilled and experienced in producing promotional materials and coordinating print, radio and television media outlets including social media.

- 6. Entertainment and Programming** – This function may be divided into two areas of responsibility. A programming function and a vendor function.

For the programming function, the Board and/or Organizing Committee should give some direction on what elements will make up the festival or event. Planning, initiating and implementing the programming elements such as live performances, activities, guest speakers or emcees, contracts and décor fall under the programming function. Decisions are based on availability, budget and fit.

If the festival or event includes a vendor component, such as food and/or exhibitor booths, etc., this function would involve the recruiting vendors, establishing guidelines and regulations and assisting with load in/load out schedules of these vendors.

- 7. Production and Event Operations** – The job of overseeing the physical site has a number of different components that may require specialized skills including technical knowledge of sound/ audio/visual equipment, venue regulations, by-law considerations, security and the ability to produce a contingency plan in case external factors prevent the festival or event from continuing on the site.

- 8. Volunteers** – Volunteers are an important resource for any festival or event. Boards and/or Organizing Committees are often comprised of volunteers who have an interest in the festival or event.

It is important to create a Volunteer Management Plan that includes detailed job descriptions, recruitment, screening, interviewing, orientation, training, supervision and recognition protocols.

Choosing good Board and/or Organizing Committee members empowers the organizer with the best possible potential for success. Having volunteers that are committed, in agreement with the goals and objectives and are willing and able to see the process through will go a long way towards ensuring the success of the festival or event.

In order to manage volunteer expectations, ensure roles are clearly defined and goals and objectives are clear. It is recommended that Terms of Reference and organizational structure be developed. To facilitate this process, a template can be found in the Community Festivals & Events Planning Toolkit.

Incorporation vs. Charitable Registration

If the festival or event is not currently incorporated as a non-profit corporation, you might consider doing so in order to obtain benefits such as rebate of Harmonized Sales Tax and limited liability for officers and directors. A Non-Profit Organization is a legal entity. The objective is to provide benefits to the community or members, rather than to earn a profit. No part of the organization's income can be paid, or otherwise made available for the personal benefit of any proprietor, member or shareholder unless it is a club, society or an association whose primary purpose is the promotion of cultural, education, religious, athletic, professional or public service objectives.

There are special guidelines for the incorporation of social clubs. The objectives must be in whole or in part of a social nature, and it must have existed as an unincorporated club or organization for at least one year prior to the date of application for incorporation.

For more information, contact the Government of Canada.

Your organization may also wish to consider registering as a charity. The major benefit associated with registration is the ability to issue official donation receipts for gifts received. This allows both individual and corporate donors to access tax benefits related to their donations. For your organization to be registered as a charity, its purposes must fall within one or more of the following four categories:

- Relief of poverty
- Advancement of religion
- Advancement of education
- Benefit to the community - such as relief organizations

The approval process can take a year or longer. For more information about registering as a charity, contact Revenue Canada-Taxation for the booklet 'Registering Your Charity for Income Tax Purposes'.



PLANNING AND LOGISTICS

Knowing the who, what, when, where, why and how of the festival or event will help to establish the resources required. Consider the following when planning and reviewing logistics:

Target Market and Attendance

The audience the festival or event is looking to attract will be based on the goals, objectives and the theme of the festival or event. It is important to identify:

- Is the desired audience the community or is it regional or provincial?
- Is the festival or event geared to a specific audience or is it intended to attract a wide-range of attendees?
- What is the desired attendance?

Carefully defining the target audience helps to determine where to promote and what programming elements are needed to attract attendees. It also helps to estimate the number of participants. An estimation of attendance at the festival or event can be based on festivals/events of a similar nature-taking place in surrounding municipalities. Estimating the attendance will allow you to prepare a more detailed budget as it will serve as the basis for estimated revenues and expenditures as well as help with fundraising/sponsorship initiatives.

Establishing the Date

When setting the festival or event date, it is important to pay careful attention to the time of year, competition from other community activities and the target audience. As a first step, it is recommended to research the community calendar of the municipality for conflicts and choosing a date that fits within that calendar.

Conversely, there may be synergies with other community festivals or events taking place on the same date where cross- promotion prior to the festival or event may work well to attract attendees through cross promotion.

Developing and Maximizing the Theme

When it comes to creating a festival or event, one of the most essential elements is the theme, as this is what will both attract attendees and help to create an experience that is unique to the festival or event.

The intent is to consistently communicate the theme in all aspects of the festival or event. It should be incorporated into: the name; programming and activities; music and entertainment; sponsorship; food and beverage offerings; décor; apparel; and in the design of marketing and promotional material.

Maximizing the theme should be a fun and creative process. Think outside the box. What activities and programs can be added to your festival or event that are fun and dynamic and appeal to a wider audience or specific audience you are trying to attract?

Determining the Location

Where the festival or event takes place is a crucial component of the planning process and directly affects its success. It is important to review the planning requirements and ensure the selected venue or location meets the required needs.

Factors to consider when selecting the location/venue:

- Budget
- Number of attendees
- Type of festival or event
- Infrastructure - hydro, water, indoor space, washroom facilities, and parking space
- Accessibility for patrons
- Safety and security
- Pedestrian access and flow
- Access to public transit

Locations/venues that are weak in infrastructure may require additional rentals and have a significant impact on budget.

If choosing an outdoor site with multiple venues, the process of selection becomes more complex.

You will need to look at the:

- Cohesiveness of the site
- Site condition –grass, pavement, accessibility, etc.
- Access points if other areas surrounding the site belong to other jurisdictions not permitted by your festival or event
- Indoor space availability in the case of inclement weather

Developing an Operating Budget

Budgeting is a critical part of the festival and event planning process. An effective budget enables the organizer to make appropriate decisions and adjustments, if necessary. It is important to closely monitor and manage the finances of the festival or event and communicate with members of the Board and/or Organizing Committee so everyone understands what expenditures and commitments can and cannot be made. Following the festival or event, compare your approved budget with the actual expenses incurred.

Before making a commitment to hold the festival or event, examine the financial elements involved, considering cost and available funds. If there is a shortage of funds, revisit your expectations and determine whether you wish to scale down and/or change the overall approach. Consider whether financial assistance can be obtained from other sources (e.g., ticketing fees, admission fees, sponsorships, grants, etc.) as well.

To help facilitate budget planning, a Budget Template is available through the Community Festivals & Events Planning Toolkit.

Creating a Festival or Event Timeline

The next step in the process is to begin preparing a festival or event timeline that sets out the timeframe for action and implementation. This timeline can be in the form of a critical path or a work back plan. A critical path is essentially a calendar that states the tasks and responsibilities needed to be completed leading up to the festival or event. It helps to keep track of deadlines and responsibilities amongst the Board and/or Organizing Committee members.

Critical paths are useful tools to refer to on an annual basis. They should include all elements and steps involved in planning and execution of your specific festival or event. This will help maintain consistency in the festival or event moving forward and make modifications or enhancements as the festival or event progresses.

Steps to creating a critical path:

1. Create a list of known activities
2. Brainstorm a list of tasks to be completed
3. Break the list into categories (i.e. marketing, logistics, operations, etc.)
4. Determine completion dates for each task
5. Assign tasks to individuals
6. Define a monitoring system including red flags and a communication system to deal with problems

Each of the Board and/or Organizing Committee Chairs should create their own timeline that includes a schedule of critical dates (e.g. dates and times for programming, activities, site installations etc.; dates and times for meetings and orientations; and load in and out times). The Chair can then add this information to the critical path to ensure key deadlines are adhered to. The critical path must be reviewed and updated regularly and circulated to all individuals responsible for assigned tasks.

To facilitate the development of an event timeline, a Critical Path Template is available in the online Community Festivals and Events Planning Toolkit . Additional resources including a Load-in and Load-out Schedule Template and Equipment Template will help to identify all operational requirements and help facilitate festival and event set-up and strike.

Developing a Work Back Plan

A Work Plan or Work-back Plan is just a little different from a critical path in that it creates a timeline for the festival or event by working backwards from the festival or event date. Tasks are typically categorized by month instead of assigned a completion or due date. By noting these key deadlines, the organizer can devise a more detailed Critical Path and determine what steps need to be taken in advance of the deadline to ensure deliverables are met. To facilitate the development of a work back plan, refer to the sample plan in the online Community Festivals & Events Planning Toolkit.

Programming and Entertainment

Programming and entertainment can range from attractions, activities, interactive games, live bands, DJs, magicians, strolling performers, etc. Selecting the appropriate type of programming and entertainment depends on the target audience and the type of atmosphere the organizer wants to create.

Before securing your entertainers, it is critical to determine the following:

- Who are the festival or event participants?
- How many attendees does the festival or event want to attract?
- What is the purpose of the programming and entertainment?
- How does the programming and entertainment integrate with the theme?
- Is it appropriate for and will it appeal to the target audience?
- Does it need to be static, mobile and/or interactive?
- What equipment may be required?
- What is the budget? For what duration?
- Will an entrance fee be charged to help offset entertainment and programming costs?
- Are any of the sponsors affiliated with any entertainment or community groups?
- Are there any entertainment rider requirements?
- Do the entertainers have references/reviews they can share?
- Will the program be accessible to people with disabilities?
- Are the programming and entertainment elements inclusive?

Local newspapers, pubs, clubs and theatre groups are potential sources to help locate live entertainment. Remember a key variable in ensuring a successful festival or event is ensuring attendees are entertained. Programming that is engaging is the most desirable.

Scheduling

It is important to keep festival and event patrons interested and engaged from the onset to the conclusion of the festival or event. Developing a schedule will enable the organizer to maintain a timeline on the day of the festival or event, as well as identify any gaps in advance of the festival or event.

A timeline should include the arrival of contractors, suppliers, vendors, rehearsal times, performance times, speeches, interactive displays/booths, etc.

Once finalized, the minute by minute activity schedule can be drafted (also known as a Run of Show) and should be circulated to all key stakeholders including emcees, presenters, entertainers, etc.

To facilitate the development of a festival or event schedule, refer to the Run of Show Template in the online Community Festivals & Events Planning Toolkit.

Contingency Planning

This is the “What if . . . ?” scenario when planning a festival or event. It is important to always have a “Plan B” with every festival or event to account for inclement weather, loss of preferred site, entertainer no-show, and lack of volunteer resources. Planning for potential risks early in the process enables Chairs to educate and communicate contingency plans with the Board and/or Organizing Committee and to defer potential “unplanned” costs in the budget.

Selecting Contractors and Suppliers

Suppliers and contractors are vital to the seamless execution of a festival or event. It is imperative to select contractors and suppliers who can fulfill their contractual obligations and provide excellent service.

The following are a few simple steps to ensure the best contractors or suppliers are hired to meet the festival or event needs:

Needs Assessment

Brainstorm and document what the festival or event requirements are and develop a checklist. This will ensure all expectations in the request for a quotation are included and will provide a basis to evaluate proposals.

Research

The Internet is a great resource to locate contractors and suppliers, but it is important to take the time to ensure that prospective contractors or suppliers are reputable and reliable. Obtaining references and testimonials will often help to determine whether the contractor or supplier would be an ideal partner.

Some questions you may want to consider include:

- How long have they been in business?
- What is the cancellation policy?
- Are they willing to provide proof of general liability insurance?
- Is someone available after-hours in case of an emergency?
- Do they have access to back up equipment or supplies?
- Is there a single point of contact on the day of the festival or event?
- What information do they require in order to provide a quotation?

Quotations

After researching contractors and suppliers, obtaining proposals and pricing is the next step. It is best practice to obtain multiple itemized quotations – this will not only demonstrate competitive pricing, but will also help identify any discrepancies in the proposals obtained (and criteria that may have been overlooked in the needs assessment).

Waste Management Plan

Festivals and Events can generate a lot of waste. It is important to think about how to maintain the integrity of the festival or event site. In order to determine how waste will be controlled, consider brainstorming the following:

- What type of waste will be produced?
- What are the high-traffic areas or areas where the most waste will be discarded?
- Are there funds to hire a company to manage waste?
- Is this a function that can be managed by the Committee and volunteers?
- If so, how many Committee members/volunteers will be responsible for maintaining the integrity of the site?
- If so, who will be the main point of contact?
- How many waste and recycling receptacles are required?
- Where will the filled bags need to be placed? Is there access to roll-off bins?
- Can these be rented from the venue?
- Where will the waste and/or recycling receptacles be positioned?
- What is the maintenance schedule?

FUNDING AND SPONSORSHIP

Funding is often the most challenging aspect of a festival or event. A start-up festival or event needs operating funds to begin planning. There are several different forms of raising funds including grants, fundraising events and sponsorships.

There are many different Federal and Provincial grants available to festivals or events that promote tourism, culture and heritage. Grants are also available for specific initiatives such as historical anniversaries, or for specific celebrations such as Canada Day. Many municipalities provide grants for community festivals or events and there are also foundations that provide funding if the festival or event contributes to their mandate.

Fundraising events such as raffles or auctions are a popular form of fundraising. While they can be profitable for an organization, they can also be time consuming and expensive to execute. The success of festivals or events depends on careful planning. Beware raffles require a municipal license to operate.

Corporate sponsorship is also a very effective way of raising funds. Building strong relationships and mutually beneficial partnerships will help ensure your festival or event achieves sustainability from year to year.

Fundraising and sponsorship coordination involves the cultivation, care and maintenance of a relationship between the festival or event and the sponsor(s). Sponsors could be individuals, Corporations, Foundations or businesses. Based on the budgetary projections, the Board/Committee Chair should have a good indication of the funds and in-kind donations required to operate the festival or event.

Managing the Sponsorship Program includes:

- Researching the community for potential sponsors and creating a sponsor database
- Writing a Letter of Solicitation to sponsors, researching the criteria (if any) for financial requests (Foundations and Corporations have clear mandates for giving)
- Establishing recognition for sponsorship including on-site participation, arranging a thank you reception or Letter of Gratitude
- Assessing the success of the Sponsorship Program

Solicitation Letter

Letters to sponsors 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 or event that align well with a potential sponsor. Whoever the sponsor, all letters should include the following:

- A description of your organization
- Your target audience and projected attendance
- Programming and activities
- Desired outcomes
- Detailed list of all recognition levels
- The benefits and recognition the sponsor will receive

Be sure to describe how you will help them to:

- Raise their profile in the community
- Reach their target markets
- Promote their product, services and/or organization;
- Increase their sales and revenue

To facilitate the development of a Solicitation Letter, refer to the sample Sponsorship Letter in the Community Festivals & Events Planning Toolkit.

Sponsorship Fees & Levels of Recognition

Developing Levels of Recognition will also be part of the package. The size of the budget for sponsor development will determine what can be offered. Set achievable limits.

Start by determining the sponsorship revenue goal and develop a fee structure that identifies the number of sponsors needed to achieve the sponsorship target.

When developing the cost for each sponsorship level, it is important to consider the benefits to be provided to the sponsor such as complimentary passes, sponsor recognition in festival or event advertising or exhibit space.

When possible, be sure to define the value of the benefits offered by either providing a concrete value or outlining how many people will be exposed to their brand (also known as impressions).

Benefits can include:

- Naming opportunities
- Logo recognition in marketing and promotional materials
- Signage at the festival or event
- Special podium announcements
- Recognition on the festival or event website
- Complimentary passes
- VIP experiences
- Complimentary exhibitor booths

A great way to engage sponsors is to customize a package that aligns with their organization's goals and objectives.



MARKETING AND PROMOTIONS

Now that the hard work has gone into the planning of an amazing festival or event, the focus needs to be on attracting the audience to enjoy it!

Marketing Plan

The event's purpose, target audience, best ways to reach that audience and available resources will all determine the best way to promote the festival or event. Keep in mind the following when developing a marketing plan:

Think about the audience

What groups of people are likely to have an interest in the festival or event? Who would benefit by attending?

Brainstorm communication vehicles

What is the best way to communicate information about the festival or event to the target audience? How do members of this group receive information? Can they be reached by email or social media including Facebook, Instagram, and Twitter? In what location (physical or virtual) would many members of this audience be likely to see advertising materials?

Take the budget into consideration

What advertising vehicles offer effective, cost efficient ways to communicate with the target audience? The best methods are those that allow direct communication with your intended audience.

Consider the Timeline

Developing advertising pieces, news releases and other materials takes time. Be sure to plan well in advance when creating these materials. Advertising materials should be delivered a minimum of two to three weeks ahead of the festival or event. If the festival or event requires registration, deliver materials at least two weeks before the registration deadline.

The development of an effective marketing plan is essential for the delivery of a successful festival or event. The key is to match the festival or event concept (the theme, programming, etc.) with the appropriate audience (those who will attend or participate in the festival or event). In order to do that, the organizer must have a strong idea of what the event actually offers and to whom, an effective plan of action, and the necessary resources to implement it.

Some things to consider when creating a Marketing Plan:

- Analyzing similar festivals or event marketing strategies, including demographics, attendance figures, and apparent strategies.
- Budget and other constraints.
- The festival or event timeline. Some things like catering deadlines will not affect the timeline. However, other things, such as the cut-off date for selling tickets and the deadline for securing speakers, will greatly affect the marketing timeline, and may even drive it.
- Specific marketing tactics that will be implemented to help achieve the festival event goals. These may include social media contests, media releases, etc.
- Conducting a SWOT analysis to identify the strengths and threats to the festival or event (such as weather, competing events that weekend, etc.).

Media Release vs. Media Advisory

A news release, media release, press release, press statement or video release is a written or recorded communication directed at members of the news media for announcing something newsworthy.

A news release has a different purpose than a media advisory. It should read like an article and include facts that the media can use to write a story. Whereas, a media advisory offers basic information, a news release is all about sharing news that journalists can use alone or use as background when writing a story. News releases are written using the inverted pyramid style of news writing—with a headline and the most important information at the top. It should include contact details should the media have questions and include quotes from a spokesperson. A news release might be used to announce a title sponsorship or the appearance of a well-known celebrity or a unique element or feature at your festival or event.

In addition, the organizer can pitch a story to the media. This typically involves a telephone call or a brief email outlining some of the main details about the upcoming event and why it would be of interest to their readers.

Not to be confused with a news release, a media advisory is a document used to invite reporters to cover some kind of festival or event, including community festivals or events, press conferences, forums or rallies.

A media advisory should be brief. The goal is to share festival or event details in a way that is interesting and newsworthy. The details should help to create a mental picture in the Editor's mind of what will take place at the festival or event so that he/she can easily decide if his/her media outlet should send a report or photographer to the event for reporting and posting after the festival or event has occurred. It should be one page in length and include contact details of the spokesperson. The document should be distributed no more than two weeks in advance of the festival or event.

Refer to the Community Festivals & Events Planning Toolkit for a Media Advisory or Media Release templates.

Advertising

Social Media

Consider posting photos of the festival or event on Facebook or Instagram or send tweets on Twitter in advance of the festival event and encourage users to re-tweet. If it is a repeat festival or event, share photos of attendees having fun at last year's festival event; create a festival or event hashtag; or post a short video with highlights from similar previous festivals or events on YouTube.

Website

Ensure the festival or event website is up-to-date with your festival or event schedule and pertinent information to keep people coming back to the site. Make sure the URL is on all advertising materials.

Online Calendars

Most municipalities offer an online festivals and events calendar that accepts community postings. It is usually the responsibility of the organizer to fill in an online form and ensure the information contained is correct and up to date. Look to other organizations/businesses who also offer online calendars to post information. Please visit Richmond Hill's online calendar for more information on how to submit information on Richmond Hill's website.

Media Buy

If your budget will allow, paid advertising through newspapers, radio and television is also an option. Some will assist in the creation of ads at no additional cost.

Mall Displays

Some local malls will offer space at no charge to organizers looking to advertise their festival or event. The mall will require the organizer to sign an agreement outlining the rules and regulations around what is permitted in the space and will require liability insurance. Several months lead-time to book space is required.

Posters/Flyers

An eye-catching poster or flyer can be an inexpensive yet effective way to advertise the festival or event. Often, local business will be pleased to place flyers on their counter or posters in their windows, especially if they are a sponsoring the festival or event.

Public Service Announcements (PSAs)

Local newspapers, radio and television stations will provide information about festival and events organized by not-for-profit organizations at no charge and as a public service.

VOLUNTEER MANAGEMENT

Volunteers are the backbone of any festival or event. In many cases, festivals and events are possible because of the volunteers assisting with the planning and execution. People have many different motivations for volunteering and there are several benefits to both the volunteer and the organizer. Volunteers have the opportunity to:

- Gain new skills, knowledge and experience
- Meet new people, connect with others and have fun
- Share in an increased sense of community and satisfaction gained through volunteering
- Complete the requirements for high school community involvement hours (if applicable)

Volunteer Management Plan

It is important for organizers to create a Volunteer Management Plan, as it will provide clear objectives and strategies to support volunteer recruitment and retention. Volunteers are critical to festival or event delivery, so having a clear plan in place to recruit, manage and recognize volunteers will contribute to the successful execution of the festival or event. Building positive relationships with volunteers will support the ongoing viability of your festival or event. The Volunteer Management Plan will ensure the event is of high quality and delivered in an efficient way. It will help provide meaningful volunteer opportunities to the community and establish relationships that will increase the organizer's capacity to run the event and contribute to the vibrancy of the community.

Consider the following key areas in the development of a Volunteer Management Plan:

Recruitment – recruiting volunteers that meet the requirements for festival or event delivery is important.

Consider the following when recruiting volunteers:

- Source ideas to recruit from within the community such as local schools or existing community organizations.
- Identify creative ways to attract volunteers.
- Research ways in which other organizations of a similar nature attract volunteers.
- Focus specifically on promotional tools, which attract the age and gender which is required.
- Have clearly defined roles and responsibilities for volunteer involvement.

Selection and screening – this step will ensure that the volunteers are a good fit for the festival or event. It is important to meet and interview volunteers. Establishing a screening process, including an interview for new volunteers will ensure the volunteer is appropriate for the role.

Placement – placing a volunteer in a role that suits their interests and skill set will contribute to a positive experience for both the volunteer and the organizer. A few considerations for placement are:

- Developing clear and concise job description for the volunteer position outlining the roles and responsibilities.
- Developing a tool kit listing the required information necessary for the volunteers to undertake their roles and responsibilities.
- Developing a process to collate and update volunteer details. This can include a brief profile of the volunteer.

Training and Development – volunteers require training to be successful in their roles. Training should include:

- A schedule of training opportunities
- Identify and list any ongoing development opportunities
- Identify volunteer career progression opportunities
- Profile each volunteer and identify ways in which the organization can offer internal opportunities for rotation/progression in different positions
- Conduct regular review of volunteer skills and abilities
- Conduct annual reviews of each volunteer to assess skills and, where necessary, provide training

Retention – attracting good volunteers is important. Once they get involved in the festival or event, there are several action items to consider keeping them engaged and involved, including:

- Maintaining and sustaining community partnerships and maintaining links with other community organizations to help source additional resources when required
- Communicate effectively with volunteers
- Provide pathways to communicate information to volunteers. Develop useful tools such as website, newsletter and flyers, and make use of social media
- Provide appropriate resources to ensure volunteers can undertake their roles effectively

Recognition – saying “thank you” is vital to a successful volunteer program. Many people volunteer for the intrinsic rewards but recognition is always appreciated. A few ideas for volunteer recognition are:

- Deliver a volunteer appreciation ceremony
- Develop a volunteer awards program to be included in the end of year celebrations to thank volunteers for their support and dedication
- Provide opportunities for immediate recognition for a job well done
- Have a relevant reward and recognition system in place
- Assess the current approaches to reward and recognition and research ways to implement an ongoing system
- Developing a comprehensive Volunteer Management Plan will provide a positive experience for volunteers and will contribute to successful festival or event delivery.

Sample Volunteer Management Plan, Volunteer Application and Volunteer Agreement Templates are available in the Community Festivals & Events Planning Toolkit for your reference.

Developing a Volunteer Handbook

Many festival or event volunteers, returning or new, will appreciate having a volunteer manual that provides an overview of the festival or event, explaining volunteer duties, obligations and entitlements.

A festival or event Volunteer Handbook can include:

- A welcome message to the volunteers from the Board and/or Organizing Committee Chair or Volunteer Coordinator
- Contact information for the Volunteer Coordinator or key point of contact
- Festival or event Information related to parking, check-in and out procedures
- 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 and regulations regarding drugs and alcohol, attendance policies and procedures
- Identification on-site that may include a badge and/or an article of clothing (i.e. hat or t-shirt)
- Festival or event 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 festival or event (20-hour commitment per volunteer, 4 shifts @ 5 hours each over 3 days)
- Volunteer benefits may take the form of a post-festival or 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 and locations should be communicated with enough notice

Developing a Volunteer Orientation Package

Individual Volunteer Packages should also be created containing information specific to their related volunteer job and may contain:

- Name and location of venue or area where they are volunteering
- Board and/or Organizing Committee member or Volunteer Coordinator contact information
- Work schedule
- Information pertinent to the specific area they are volunteering for
- A sample of “Frequently Asked Questions” with the appropriate response
- Information about what to bring and where personal items may be safely stored
- Program or a copy of the Master Schedule for the festival or event.

EMERGENCY PREPAREDNESS

Public safety is a key component when planning a festival or event. It is important to identify potential risks during the planning and create a plan to assist in mitigating those risks. All Board and/or Organizing Committee members and volunteers must have a complete understanding of the procedures and protocols should an emergency arise.

Emergency Action Plan

Producing an Emergency Action Plan (EAP) has a number of benefits that will help your organization deliver a safe and successful festival or event as it will assist in:

- Identifying risks or potential risks
- Identifying the measures needed to be put in place for the protection and well-being of the public and participants who will be attending the festival or event
- Reduces the risk of loss of life and property damage resulting from an emergency
- Identifies the roles and responsibilities of individuals/groups/organizations

An EAP should include the following:

- Two contact personnel including their cell phone numbers and how they will be contacted in case of an emergency
- Evacuation area with an evacuation route
- Procedures to be followed in the case of an emergency or disaster (e.g. medical emergency, inclement weather, lost persons, lost or stolen goods and other potential emergency scenarios)
- Emergency services required in case of an emergency or disaster
- Communication procedures with the necessary authorities
- Details of how volunteers and organizational staff have been prepared to handle a disaster or emergency situation
- Details of how security will be contacted and respond to an emergency or disaster during the festival or event

It is crucial that first-aid trained staff/volunteers are on-site during the festival or event. Private companies specializing in mobile emergency responders can assess, treat and work with Emergency Medical Services (EMS) for first aid or medical emergencies should the need arise. Organizations such as St. John Ambulance can also provide Medical First Responder (MFR) volunteers that provide basic and advanced first aid when emergencies occur.

It is wise to notify EMS, Fire and Police if planning a large festival or event that will attract a considerable number of attendees. With the potential for multiple incidents to be taking place at any given time, advance notification to these groups can assist with proper planning on their part.

An Emergency Action Template is available in the Community Festivals & Events Planning Toolkit for your reference.



Inclement Weather Protocol

Outdoor festivals and events are exposed to the threat of inclement weather at any given moment. As an organizer, it is important to monitor the weather leading up to the festival or event and on the festival or event day to ensure the safety of the committee and attendees. Several inclement weather scenarios may arise and organizers need to determine a course of action for each. These include but are not limited to:

- Heavy rainfall/flooding
- Thunder and lightning
- High winds
- Extreme winds/tornado

Lost Child Protocol

At any large community festival or event, there is the potential for children to become separated from their parents/guardians. There are two main scenarios that may occur on festival event day to signify that a child has gone missing:

- Being approached by the parents of a missing child
- Being approached by a missing child

In order to resolve both of these situations in a positive manner, it is important to have a protocol in place that outlines responsibilities and the key individuals who will take charge.

For more information regarding Emergency Plans, Inclement Weather and Lost Child Protocols, contact Event Services Staff who can assist you further.

Risk Assessment

Every festival or event regardless of the scope or size will include potential risks. It is the responsibility of the organizer to identify and manage these risks. The best way to mitigate risks is to anticipate, understand and control risk factors as much as possible by conducting a risk assessment.

There are three steps to conducting a risk assessment:

Identification of Potential Hazards

Brainstorm all possible situations or activities that may expose attendees, Board and/or Organizing Committee members or volunteers to injury or illness. Record these hazards by creating a list.

Assessment of Potential Hazards

Determine the likelihood of people exposed to the hazard by using a rating scale. For each hazard, list what the potential consequences could be as a result of the hazard occurring.

Mitigating Potential Hazards

Identify what practical measures can be implemented in order to reduce or eliminate the likelihood of the hazard occurring.

A sample Risk Assessment Template is available through the online Community Festivals & Events Planning Toolkit.

General Liability Insurance

It is important to assess all of the potential risks or hazards associated with the festival or event and develop appropriate protocols as noted above to help respond to any emergencies. Proof of General Liability Insurance is mandatory for all municipal festivals and events and the minimum requirements vary depending on activities offered. The minimum amount of coverage required is \$2 million per occurrence.

For more information regarding Richmond Hill's insurance requirements for event participants, to obtain copies of the templates or to download an insurance tracking form, refer to the Community Festivals & Events Planning Toolkit.

EVALUATING THE FESTIVAL OR EVENT

Evaluation is an important component of any festival or event. It allows organizers to reflect on what worked well and to identify areas of improvement for future festivals or events. A number of stakeholders are involved in the planning and execution of festivals or events including; Board and/or Organizing committee members, vendors, entertainers, suppliers, sponsors and event attendees. It is important that each stakeholder be given the opportunity to provide feedback about what worked and what did not.

Some reasons for evaluating your festival or event include:

- Determine if you have reached your objectives
- Measure the success of the components of the festival or event
- Review the process from beginning to end
- Identify the strengths and weaknesses of the festival or event
- Assess the accuracy of the area budgets
- Accountability to the festival or event organization, stakeholders, sponsors, volunteers
- Participants and funders

There are two ways to carry out an evaluation and both can be used from the beginning of the process to monitor how the festival or event is progressing and where there may be issues:

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, videotaping aspects of the programming and getting feedback from volunteers, sponsors, suppliers and performers.

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

It is important to schedule a debrief meeting with all of the key stakeholders who were involved in the festival or event, as soon as possible following your festival or event, asking for feedback directly related to their position and responsibilities.

Evaluation Report

Once a debrief has been completed, an Evaluation Report should be prepared.

Your report should include:

- Festival or event description
- Extent to which goals and objectives were met
- Elements of the event that were successful/unsuccessful
- Feedback from the committee members/vendors/entertainers etc. and attendees
- Copies of the media who reported on your event – print, advertising, radio and TV, social media
- Photographs of the event
- Financial statements
- A copy of promotional material produced – program, posters, flyers etc.
- Decisions and ideas for future directions for your festival or event

To learn more about planning a festival or event in Richmond Hill, the Community Festivals & Events Resource Manual will help further guide organizers through the event process.

Please visit our website or call 905-771-2424 for more information.

