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#### Disclaimer

TAF Guide contains information that is up-to-date as of April 21st 2015. If you are a human in the near future, looking for technical or by-law related information, we recommend that you check on the websites listed in the relevant <u>References Section</u> to confirm that the information is still correct!



The Toronto Arts Festival Guide came out of numerous discussions beginning in January 2015. Our team was drawn together by a core question:

"What can we do to make the arts easier for everyone to enjoy?"

Our second question was along the same lines:

"Why is gluten-free pizza so expensive?"

(We're deeply concerned about accessibility on multiple platforms-both the arts and food.)

Looking back on our experiences as young artists and arts-liking people, we realized that all too often, we are forced to stumble, make mistakes, and feel

> generally out of the loop when it comes to putting on festivals. Festivals and other events like it are great ways to bring a community together, to explore common interests, and to engage in art in new and exciting ways. So, while those stumbles and blunders were great for what our parents called "building character", we wanted to make it a little bit easier for those people who are brand-new to festivals.

This guide is designed to do just that. TAF Guide is your starter pack, your base game, your first draft. It's not meant to hold your hand through the entire process (although we are not adverse to hand-holding in general.) We are here to illuminate the process of events planning, make you think about things you maybe haven't considered, and point you in the direction of bigger and better resources.

And maybe figure out why gluten-free pizza is too damn expensive.

## About the Authors

Sophie Malek,

Arts and Culture Cheerleader and Hanger-On

**Education:** University of Toronto

Western University

Favorite Toronto Festival: Toronto International

Film Festival

Origin Story: The medieval history student has

now joined the 21st century.

**Favorite TAF Moment:** 

Researching all the ways artists can get MONEY!

**Best Advice for TAF Users:** 

Grab a few competent, dependable friends and take the plunge.



Rob Bril, Director of Knowledge Gathering **Education:** Queen's University

Favorite Toronto Festival: World Electronic Music Festival Origin Story: Always been involved in art making in one way or another. Loves theatre, music and all things pizza.

Favorite TAF Moment: Putting the Arts Admin

program to good use **Best Advice for TAF Users:** Start Small. From there, you can Go Big or Go Home.

Not Before.



Anne McCallum, Master of Brilliance and **Shenanigans Education:** Brock University **Favorite Toronto Festival:** Hot Docs

**Origin Story:** Poppin' Culture everyday.

**Favorite TAF Moment:** Recording our vines.

**Best Advice for TAF Users:** 

Go confidently in the direction of your dreams:P



Lauren McCauley, Chief High-Five Engineer **Education:** McMaster University **Favorite Toronto Festival:** Toronto Fringe Festival Origin Story: Started from the middle, now we're here.

**Favorite TAF Moment:** 

Arguing the merits of terrible dad jokes. Best Advice for TAF Users: Enthusiasm for your work means you're already 90% there.

TAF Guide could not exist without the support of Humber College's Arts Administration and Cultural Management (ARTC) program. A one-year post-graduate certificate program, ARTC is designed for artists and arts-minded people to get practical experience in every aspect of the arts and cultural sector We are eternally grateful to Program Coordinator Anne Frost for her assistance and encouragement in the creation of TAF Guide.

When planning festivals it is extremely important to take into consideration the scope of your event. Scope can refer to anything from the size of your festival to the smallest detail, in other words the parameters and complexity of your project.



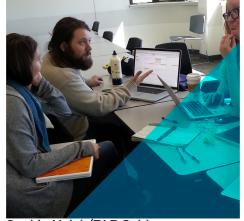
## **Vision of your Festival**

- A mental image that anticipates something related to the future of the business
- Provides guidance and inspiration as to what the event is focusing on achieving
- General idea of what they plan to do; Big picture

## Setting Your Scope

When first starting to tackle the cumbersome concept that is scope it will be helpful to answer these three questions:

- > What do we do?
- > For whom do we do it?
- > How do we excel at it?



Sophie Malek/TAF Guide

When setting out to create your objectives, you may find the acronym S.M.A.R.T. to be helpful.

**S**pecific

Measurable

**A**chievable

Realistic

Time Limited

## **Mission for your Festival**

- More detailed
- Defined present state or purpose of the organization
- States what it does, who it's for, and how

## **Mandate of your Festival**

Formal statement, which incorporates the vision and mission statement

Clearly defining who you are and what you want to do is the key to success. By using those three questions and S.M.A.R.T. to define your event, you are creating your event's vision, mission and mandate.

## Protecting Your Festival Against Scope Creep

In the process of planning your festival, you may have brilliant idea upon brilliant idea that you think will make your festival better than it was in the planning stages.

However, you may not have considered the amount of time, money and effort it will take to add in all these amazing new ideas to your festival. This is called scope creep, in which uncontrolled changes or new objectives are added. Scope creep can be very damaging to your production, and it may lead to your project getting out of hand. It can increase financial and human resources costs, not to mention the time needed to properly plan your festival.



Use the Triple Constraints
Triangle to inform your
planning. If your Scope
increases, your Time and
Cost investments will need
to increase. Likewise, if your
available Time and resources
(Cost) decreases, Scope should
correspondingly decrease.

## **Other Scope Considerations**

When planning your festival, there are so many details to take into consideration that it can be easy to forget something. Thankfully, we are here to help you with a few reminders! Establishing a theme, atmosphere, name, logo etc. will be crucial in maintaining your scope. In addition, there are many festivals throughout the Greater Toronto Area and your festival may inevitably be similar to another. It is important to distinguish yourself - perhaps in content, sponsorship, or audience. Similarly, it will be to your advantage to avoid any schedule overlap with established holidays as there will be a strong chance that your audience's time will be taken up.



## Human Resources

One of the first questions to ask regarding your festival is: who? Who is planning the event? Who do you have that can help, or offer something you need? This guide is aimed at individuals or small groups, not organizations. But no matter your group size, everyone must have clear roles and job descriptions, and everyone must agree on the vision and mission of the festival.

## Project Initiation Document

A great first step for any large project is to sign off on an initiation document. Get your core team together and come to an agreement about things like:

- > What are the mission, vision, and goals of the festival?
- > How will you measure the success of your festival?
- > How will you communicate with each other?
- > How often will meetings will take place?
- > What behaviours are unacceptable from your fellow team members?
- > How will you make decisions as a group? By vote, by consensus, or does one person have the final say?
- > What committees are needed to plan your festival? Think of important areas, like marketing, programming, fundraising, and logistics.

## **Human Resources Plan**

A human resources plan can show what skills you already have within your team, and what (if any) other skills are needed. You may have to recruit other members to your team, or perhaps volunteers can help you fill in the missing roles. The success or failure of your festival may depend on the people organizing the event.

Begin with these three steps:

## **Identify Your Needs**

What skills are needed in each area of your festival planning (communication, graphic design)?

Who do you have already that has those skills?

What set of skills is lacking on your team?

When will you need them? Now, or closer to the event date?

## Conduct a Job Analyisis and Write a Job Description

Think of the knowledge and skills your current team members have, and see if they should be re-organized (perhaps the person who volunteered to do marketing has more experience with fundraising)

Draft job descriptions for each position - with input from everyone on your team

Differentiate between skills that are required, and those that would be an asset

Remember to think of the knowledge and skills needed, not the person

## Determine the Feasibility of Hiring

Can you pay the people on your team? Or can volunteers do these jobs?

Don't assume people can double-up on jobs - this can lead to being overworked and stressed

Remember it takes time to recruit and train both staff and volunteers - start early!

## Human Resources

Volunteer Management

## Where can I find volunteers?

Start with your friends, classmates, colleagues, anyone you know who may be interested in your festival and want to help out. Place a call-out for volunteers on your webpage and through social media channels so that it can reach a wide audience. Put up posters at schools and universities (students are often looking for volunteer opportunities for school credit or to gain skills). You can also contact similar organizations - volunteer coordinators often e-mail their volunteers to let them know of other opportunities around the city.

## What should they wear?

This depends on the event, and on your budget, but volunteers need to stand out from the crowds. Have t-shirts printed, or at least name tags on pins or lanyards. Remind them to wear comfortable shoes if they will be standing for long periods of time

and to bring weather-appropriate clothing if your festival is outdoors.



Jesse Milns/Blog TO

## What should I tell them?

Hold a general orientation for anyone interested in helping out. It should let the potential volunteers know about your organization or group, what your mission and mandate are, exactly what your festival is, when and where it will be, what positions you're looking for, and what's expected of them. This lets potential volunteers know if they will be a good fit. Depending on the number of volunteers you need, you may have to hold more than one. The session should conclude with one-on-one interviews; have a large panel ready so it's a speedy process.

You will want to hold a more specialized training session on-site, usually held early on the day of the festival. Give your volunteers print-outs with basic festival information, position descriptions, and a clear schedule for the day - rotate your volunteers through different positions so their day is a bit more varied, and stagger breaks so you always have enough volunteers on shift. Make sure your volunteers know who they report to at the beginning and end of their shift, and who they should contact if they have any problems. Remind them that, as volunteers, they are to refer any angry visitors to staff, who are paid to deal with any issues or conflicts. Make sure they are aware of any policies that affect them, such as those regarding accessibility, harassment, privacy, and health and safety.

## What should they get in return for volunteering?

Your undying gratitude! Most events would not be able to run without volunteers, so make sure they feel appreciated and treat them with respect. It would be ideal to offer them a place to put their things, a bottle of

water, and some food or treats for their breaks. They should get a fun experience - or at least the promise of a position change if they're doing a somewhat boring task. The volunteer coordinator should do their best to check in on volunteers, chat with them, make sure they are content, and keep them updated with all pertinent information. It's nice to be able to reward your volunteers. Perhaps they can access performances for free, or access the festival grounds on a day they aren't volunteering. Having a party of get-together after the festival is also a nice way to say thank you.

# Money Things Budgets

Let's get this out of the way: no one likes budgets! They are, however, necessary and unavoidable. They are also of the utmost importance when planning a festival, as they keep you on track with your spending and the money coming in.

Budgets are made early on in the planning process to help you compare your revenues and expenses, so you can decide whether your festival is feasible or not - in this case, whether you will lose money, break even, or make a profit. They help you identify risks and become aware of challenges you may face. Budgets include both revenues and expenses. They

are also a projection. For better or for worse, things can and will change! It's important to keep updating your budget at key points with actuals - the money you've actually made or spent up to that point - throughout the planning, to keep track of how close or far you are from your original estimates.

In general, the revenue section will require more guesswork and the expenses will tend to be fixed. With expenses, research can be done beforehand by looking at permit fees, insurance costs, store catalogues, and calling suppliers for estimates. Revenues will be harder to predict, since it is difficult to know exactly how many people will buy tickets, or how many businesses you will be able to convince to sponsor your festival.

## **Things to Remember**

- > Begin by looking at how much you want to spend, and then think of what revenue you need to create a feasible event. Fill in what you know, and finish with estimates.
- > Be realistic with your numbers. Look at past events you have been a part of, or ask around your network (friends, colleagues, organizations that have put on similar events) for amounts that make sense. There will be some guess work, but it should be an educated guess.
- > Do a good amount of research and be creative in order to find all of your possible revenue streams. There may be a grant you hadn't looked into, or a local business willing to sponsor your event after receiving a well-written proposal.
- > On the other hand, be honest with your expenses. Some might think you can leave \$0 amounts for certain things, like marketing, but will you attract enough publicity (and thus enough revenue) using only social media?
- > Be realistic when it comes to your audience numbers and ticket sales. You may have an expensive venue in mind, but will you be able to attract the number of attendees you would need to pay for it?
- > Be conservative with your planning. Expect that expenses will be a little more, and revenues a little less.
- > Keep careful track of any money coming in or going out. Keep all receipts, and update your spreadsheets regularly so you know how much cash you have on hand!

If you want to put a festival, a big thing you'll need is money! There are many different ways to fund your festival. Do your research well in advance, and have a few different ideas. Keep in mind that the more sources of revenue, the better - most granting organizations won't fund 100% of your event.



## Ontario Arts Council

Revenue

### Government

All three levels of government offer grants for artists and arts activities through arts councils. Most grants are divided into two categories: operating (to assist incorporated not-for-profit organizations with their on-going expenses) and project grants, which cover one-time, time-limited events - like your festival! Project grants can be granted to unincorporated or ad-hoc collectives (usually two or more artists working under a group name). These groups, however, still need to operate on a not-for-profit basis. Each council has their own definition of a 'professional artist', so it's a good idea to take a close look at the guidelines.

Be sure to read the program guidelines carefully, and always contact the grant officer if it's your first time applying. It usually takes around four months to get a decision on grant applications - so start early!



## Toronto Arts Council

Project grants can be found under the different disciplines funded by the TAC.

Discipline-Specific Project Grants

Strategic Initiatives Funding

- Community Arts
- Dance
- Literary
- Music
- Theatre:
- Visual and Media Arts

- > Animating Historic Sites and Museums (in conjunction with City of Toronto Museums)

Similar to the TAC, the OAC divides their grants by discipline. The following OAC Project grants may apply to festivals:

- Aboriginal Arts Projects: Category 3 (Festivals, etc)
- Artists in the Community/Workplace: Production
- > Arts Education Projects
- > Craft Projects: Connections
- **Dance Initiatives**
- Literary Festivals and Organizations (Projects)

- Media Arts Projects
- Multi and Inter-Arts Projects
- Ontario Arts Presenters
- Opera Projects
- Presenter/Producer Projects (Music)
- Theatre Projects: Theatre Initiatives grant
- Visual Arts Projects

## Department of Canadian Heritage





The DCH is a large granting body for arts and culture across Canada. The Building Communities through Arts and Heritage currently funds up to \$200,000 of eligible expenses. These categories could apply to your event:

Local Festivals: For a recurring festival that features local artists, artisans, heritage performers, interpreters, storytellers, etc.

Community Anniversaries: For an event that is celebrating a historical anniversary (100 years +) and features local artists, artisans, heritage performers, etc.

Canada Arts Presentation Fund: Only available for incorporated not-for-profits.



for the Arts

Aboriginal Arts

Dance

Canada Council Conseil des arts du Canada

Canada Council for the Arts www.canadacouncil.ca

Project grants can be found under the different disciplines funded by the CCA.

Discipline-Specific Project Grants

- Media Arts
- Music
- Theatre
- Visual Arts
- Inter-Arts
- > Writing and Publishing

## Corporate Sponsorship

Corporate sponsorships range from a cheque for \$50,000 from a large national bank to \$30 in pastries from your local bakery. The most important thing to do is ask! And don't discount those small, local businesses; many of them say they don't donate because they weren't asked.

Large companies will expect a multi-page proposal, well-designed with images, that clearly states what your festival is and why their company is a good fit for your event. Perhaps you both have the same audience, or perhaps the company is trying to reach out to a new market. Start with online research - the department you're looking for is most likely called Corporate Social Responsibility, Corporate Giving, Community Leadership, etc. Many large companies have a certain focus to their giving (health, children, education, etc) so shop around for the best fit. Pay attention to dates - the earlier the better.



Stacie DaPonto/ Wikimedia Commons

For small businesses, a simple letter can do the trick - but reach out in person if you can. Need beer for your beer tent? Contact your local microbreweries - new ones are popping up every day. Snacks? Check out local grocery stores (speak to the store manager) or restaurants. Think local!



Stacie DaPonto/ Wikimedia Commons

Be prepared to let your sponsors know what you can do for them in exchange for their generous gift. This could include offering them free tickets, acknowledging them in a "Thank You" speech, and putting their logo in a program, on posters throughout the event, on printed ads, and on your website/social media channels. Have a sponsorship benefit chart ready to show them the different perks they can get for their financial level of sponsorship.

## Crowdfunding

Crowdfunding has exploded in popularity in the last few years. Any money raised goes directly towards the project being funded. It can be a great way to raise money if you're not a registered charity, but be warned: since they're not getting a tax receipt, donors often expect something in return for their donation. The ease of online marketing and payment means that this can be a very effective way to raise funds for your festival. But remember, the website will charge a fee on each donation, and you'll have to pay for credit card processing as well.

## Popular Crowdfunding Sites





Fund-What-You-Can Run by the Toronto Fringe, Fund-What-You-Can was designed for indie arts projects. They have the lowest fee - only 3.5% for either the "all-ornothing" model or "keep what you raise". Their payment processing fee is 2.9% plus \$0.30/transaction. The funds raised by the website get reinvested in the Toronto Fringe!



## **KICKSTARTER**

Kickstarter

Centering on creative projects, Kickstarter follows the "all or nothing" model, meaning that if a project doesn't reach its target it doesn't get funded. Their fee is 5%, with processing fees of 3-5%.



## Special Events

A common saying you'll hear when it comes to special events is, "Never do special events!"

Events can be fun, creative, and can help you to raise money, but a lot of work is involved and often it can be difficult to cover the total cost of the event with the money raised.

Here are some tips:

- > Plan well in advance as many months as possible. This will give you enough time to decide on the best idea, find the ideal location, gather staff and volunteers, find sponsors and donors, and give you enough time to publicize your event.
- > Make sure your fundraising event corresponds with your festival. If you're planning a Shakespearian theatre festival, a sports-themed event may not be the best fit. Make sure you are very clear about your objectives (for example, how much money you need to raise) and who your audience is, and base your choice of location, venue, entertainment, food, etc. on these decisions.
- > Reach out to any and every business to find sponsors. Reward sponsors with advertising and other acknowledgments at your event. Reach out early and often.
- > Remember that if you're charging a hefty fee for tickets, your guests will expect food and (perhaps) drinks, entertainment, even prizes or gift-bags.
- > Don't forget to say thank you to all staff, volunteers, donors, sponsors, and anyone else who helped make your event a success. Acknowledging people will make them feel appreciated.

Ticket sales will be an important budget line when it comes to your revenue, but make sure your estimate of attendees is realistic. You don't want to fall "in the red" because of low ticket sales.

Depending on the type of festival you're organizing, you may charge one ticket price for the day, or charge for each separate performance. Think of possible discounts - for students, or seniors, or arts workers. Online ticketing systems are easy to use, and your visitors will like the ease of booking online and showing their tickets on their smartphones. You will most likely be looking for a third-party ticket seller, but beware the high fees they can charge. You can often push this fee onto the ticket price, but this will affect what your attendees will pay. And like any online payment system, there are processing fees to consider.

## **Popular Ticketing Sites**









# Money Things

## Expenses

Expenses can make or break your festival. As a festival organizer you need to make sure that you have your financials in check before you even begin the planning stages. Without a proper budget of what your festival is going to cost you, your festival could end before it has even started. In this section of the TAF Guide we will discuss a few integral expenses to think about when you are planning your festival. To understand how to implement these items in your budget please refer to Appendix C.

#### **Artist Fees**

As a rule you should always have in mind that you are going to pay your artists. Without the artists your festival will be a bunch of planning with nothing to show for it.

## Staff Fees (See Also Human Resources)

- > The Golden Rule: PAY YOUR STAFF!
- > Your staff is there to help your festival succeed so make sure that you are treating all your staff with respect.
- > Volunteers that are on your festival team need to feel that they are a part of the team so treat them with courtesy and respect at all times.
- Let your staff know what they have to do and pay them appropriately.

## Location Rental Fees (See Also Venues)

- > Your venue will cost money so make sure you find out how much.
- > If you are low on funds, look into cultivating a partnership with a local organization that has a venue.

#### Permit Fees

- > Depending on your venue, festival style, and approach, you need to make sure you account for your permit fees in your budget.
- > These fees can add up quickly so make sure you have considered and included them in your planning and budget.



## **Equipment Rental Fees**

- > Think back on the scope and programming of your festival and determine what you need to put your festival on.
- > Get quotes from rental companies because they are in the know and deal with this all the time.
- > Get 3 quotes so that you can field a better price but make sure the service is there to match.
- > Look up reviews and talk to others to see if that business is the best for you.
- > Here are a couple things you may need to add to your budget:
  - > Lighting > Extension Cords
    - Stage Rental > Projectors
  - > Fences > Portable Generators
  - > Tables > Heaters

## Programming

The programming of a festival is largely the most important part as it is your audience's largest touchpoint. It is how the audience interacts with the festival; it is what attract your audience. Ultimately, the biggest criterion for selecting programming is suitability.

- > Does your programming reflect your vision, mission and mandate?
- Is it something you want to be involved with?
- > Be sure to take into account what type of interactions you want at your festival. For example, are you trying to evoke emotion or entertain your audience?
- > Do you want to encourage discussion, or mixing and mingling?
- > Select the programming and schedule with your audience in mind.
- > Is it family-orientated and therefore taking place during the day, or are you looking for a rager with audiences participating late into the night?

Artist Relations

Booking Your Artists

Booking your favourite artist can be a daunting task, especially if you don't have all the money in the world.

For festival organizers on a shoestring budget you will want to reach out to local talent in order to fill your festival with entertainment.

A good way to organize talent in your local area is to put out a Call For Submissions via social media.

Artists are the backbone of your festival. Artists can mean anyone in a performance role such as musicians, painters, dancers, or actors. Without artists your festival is nothing but a space for people to congregate. But how do you get artists to come and play at your festival?

This process can be a difficult task if you have never put on a festival before. Building a relationship with your artists is a sure-fire way to attract talent to come to your festival and have them return if you want to put on your festival again in the future. The following section describes areas that you need to consider in order to secure your festival with artists.

**Cultivating Grassroots Artists** 

Local artists are your friends when putting on a festival for the first time. Local artists will be there to help you put on the best show, because it is definitely in their best interest that the festival goes well. The festival itself is a reflection of the artists that you engage so make sure that you have a local presence to build your content. Below you can find a few tips that can help you cultivate local artists in the pursuit of a successful festival.

Put out a call for submissions on your social media platforms in order to spread the word.

Go to other festivals and events prepared with business cards to give out to local performers. Building relationships is a crucial in securing local talent for your festival.

Keep yourself informed as to who the up and comers are and start conversations with them any way you can.



media Comm

#### **Unions**

When you have to book your artists you need to know if they are a part of an artist's union. Unions are set in place in order to ensure that the artist gets paid a fair market amount, set out by the specific union you are dealing with. For links to more information about agreements, check out the TAF Guide References Page.



Canadian Actors' Equity Association (CAEA):

Canadian Actors' Equity Association provides a single detailed document in order to access



Le Front Des Artistes Canadiens)

If you are interested in securing visual artists for your festival find out if they are a part of CARFAC.

CARFAC has a minimum fee schedule citing that "artists, like professionals in other fields, should be paid for their work."

The visual artist fee schedule is located through the CARCC (Canadian Artists Representation Copyright Collective) website.

- For specific information related to festivals you will want to scroll down to Section A.1.5 – Performance Presentation Fees.
- If you are having visual artists create work in public please refer to section A.1.8 -Creation of a Work in Public.

performers for your festival. CARFAC (Canadian Artist Representation/ All actors that are a part of this union need to read and complete the festival policy form in order to allow live performers enter your

> CAEA defines performers as the following while in a festival setting:

- Full or partial theatre
- Dance

festival.

- Opera productions
- Improvisational performance
- Busking
- Scene studies

As festival organizers, you need to ensure that if you are programming the entertainment, in regards to the type of performer or performance, as stated above, ensure you are following the rules governed by CAEA.

If you are overseeing the performances created underneath your festival, ensure that those organizing the performers are adhering to the rules and regulations governed by CAEA.



#### Contracts

In order to secure talent for your upcoming festival it is advisable to draw up contracts. This holds talent liable and ensures that everyone is clear regarding their responsibilities.

If your potential artist is more established, you can always speak to their management. They will have these contracts for you to sign.

This is also done to mitigate risk associated with performers backing out of your festival at the last minute.

If payment for your performers is required, a contract will help you secure your legal obligations in writing.

Consulting legal counsel for your contracts is advised; however there are many resources available online to help you with drawing up a contract by yourself. (Check out the References sections for one example!)

- This particular festival entertainment agreement lays out dates, locations, times, performance descriptions as well as price.
- Without a formal written contract you may be faced with legal challenges in the
- future so make sure you have one drawn up so that all parties understand what is
- expected.



Unless you're having

a next-level Matrix event, your festival has to happen somewhere. A venue for a festival has to hit the sweet spot for you: right place, right products, right price. Not every venue is perfect for every festival, but so long as you keep a few things in mind when looking for a venue, you can make the best decision possible for your festival!

## Contacting a Venue

When you see a place that you think might be perfect for your festival, be internet bold! Creep their website and social media (if they have any): Do they have pictures of events like yours on there? What's their web presence like? Are these people being torched on Yelp for, say, screaming and throwing cake at their employees and customers? All this internet stalking has a side advantage: you will generally be able to find contact information for a booking agent on one or more of these platforms.

While we do live in a golden digital age, don't be afraid to call them up! It's easier to get a fast and decisive answer to a question on the phone or in person than to wait on email. That being said: If it's not written down, it didn't really happen.

## Tips for Contacting a Venue

For bars, clubs, and restaurants, don't go during peak hours without first connecting with the manager. Showing up unexpectedly to a bar at 10pm on a Friday asking to talk to the manager about an event is not going to endear you to that venue- be considerate!

Captain Obvious: Call them and ask when a manager/booker will be at work. See if the person has a work email, and shoot them a message if they do.

Be specific, but flexible. Come with your ideas about what you want your festival to be, and what you need for it to succeed. Come with possible dates and times that you'd like to put on the festival. Come with a solid plan, but don't be afraid to modify that plan [woah, that's a serious life lesson too.]

Permits, Contracts, and More (See Also By-laws + Permits)

We will be discussing permits in much greater detail later, but they are always important to remember when viewing a potential venue.

Liquor License/Special Occasion Permit

For a lot of events and venues, alcohol sales can be a key part of revenue (duh.) So, it's important to know: Is the venue licensed? What restrictions, if any, does the venue have on their license? (For instance, are they allowed to serve alcohol at all-ages events? Are alcohol sales and consumption limited to a certain area of the venue-- like a beer garden?)

If the venue has chosen not to sell alcohol or does not have a license (for instance, a public park), and you're hoping to do so at your event, DO NOT FEAR. This does not have to be a dealbreaker if you love everything else about the venue. Ask if they will permit you to have a Special Occasion Permit (SOP), which the LCBO/AGCO can issue for specific events that would allow you the sale and consumption of alcohol. On the other hand, this will definitely involve extra work, time, and of course, money: you may be required to pay for the application for an SOP, as well as other incidental costs (like fencing off an area of the venue, or hiring additional security.)

## Capacity

Every venue will have a capacity designated by the City of Toronto, and most will have it posted. But don't rely on signage: ask the venue directly what their capacity is. If you only intend to use part of a space (for instance, in a club where you can separate the bar area from the dance floor), ask what the capacity is for that part of the space. Go with your gut on this: if a venue's manager (or booker, or whomever you have been told to speak with) is unclear on their capacity, or seem wishy-washy to you about it, it is a definite red flag-- capacity is a standard question that they should know the answer to almost immediately.

Though ticket sales will be discussed in greater detail elsewhere in TAF, a quick note about capacity and the number of tickets available:

- > A common rookie mistake is forgetting to consider the festival staff, yourself, any volunteers you may have, and any extraneous people to be part of the capacity of the venue. A good rule to remember: if you are a person in a venue, you are counted as part of the capacity.
- A good organizer will never sell out the entire capacity of a venue, but will instead reserve a certain number of tickets for comps, guests, benefactors, and even latecomers. While it may feel weird, don't be afraid to hold some back (you don't have to tell anyone outside of the festival management-- you can just do it!)

### Rentals

First things first:

A VERBAL CONTRACT MEANS NOTHING.

Even if you begin a conversation over the phone, or in person, always ALWAYS ensure that your conversation is followed up with a written contract. These don't have to be complicated documents full of legalese-- just make sure that whatever you have discussed with the booking agent is reflected on the contract.

Be sure to check in about their policies on payment and cancellation.

- > Do they require payment in advance, in a specific manner?
- > When is the last possible date for you to cancel?
- > Is there a cancellation penalty?

### PRO TIP 2:

The biggest mistake you can make when signing one of these contracts is to not ask questions when you have them.

#### Location

No one likes to be inconvenienced, so unless isolation is part of the brand that you are pushing hard with your festival, always consider your target demographic when picking a venue.

- > Is your chosen venue easily accessible from public transit, or is driving/biking required?
- > By choosing this venue, are you limiting your target demographic in some way?

Accessibility (See Also Accessibility)

Accessibility should always be on your mind.

- > Is your event in a venue that every member of the public can easily enter and exit?
- > Are there washrooms that are usable by audience members with disabilities?
- > Can mobility devices easily access the venue?

The facts of life are that not all venues will be 100% accessible for everyone. However, when you are using a venue with such limits, you need to tell all potential audience members (generally completed during your marketing campaign.)

#### PRO TIP:

Your rental fee may
be waived if bar
sales (alcohol sales)
exceed the total
cost of the rental
fee. If your festival
is geared towards
alcohol sales (for
instance, a music
festival) ask your
potential venue if
that's a
possibility!

Weather

Unless you're a member of the X-Men, weather is pretty uncontrollable. This is especially pertinent for outdoor events, though it can factor into your indoor festivals as well! You'll find that, with outdoor events, the question is the same across the seasons: is there some sort of contingency and back-up built into your festival's design to mitigate whatever the sky is throwing at you? The most important thing to keep in mind when dealing with weather and festivals is safety: safety of your staff, visitors, and venue (among many, many other things.)



Snow Plan

- If your festival is snowdependent, what will you do if there's no snow?
- > Is it going to be safe for everyone to arrive and leave?
- Are walkways cleared and safe to use?
- > How has accessibility been impacted by snow?

### Cold Plan

- > if you're outside, do you have a tent, or an area of your venue that is partially covered?
- > if you're outside, does your festival need portable heaters (if not for the general audience, then at least for the performers)?
- > Have you informed the audience to bundle up?

Heat Plan

This is a huge concern in the summer months, when outdoor events are frequent.

- > If you're outside, do you have a tent, or an area of your venue that is partially covered?
- > Does your audience/staff/ volunteers have access to water (either via fountains, via bottled water being sold or provided, etc) or other hydration stations?

Rain Plan

Rain, while unpleasant, is not necessarily a deal-breaker!

- if you're outside, do you have a tent, or an area of your venue that is partially covered?
- does rain impact accessibility/safety of your venue in any fashion?
- will rain impact the ability of your audience to find your venue?

volunteers and staff are on-hand to ensure a smooth and orderly exit.

Extreme Weather

like thunderstorms,

When faced with weather

hurricanes, and of course,

the dreaded thundersnow,

you should have only one

reaction: Shut. It. Down.

Using your sound

have in place, inform the

audience that you have to

shut down for the safety

◆ f everyone

Direct audience

the exits (or, if

vou're lucky, to

an indoor space

make sure your

nearby), and

members to

nvolved.

system or whatever

address system you

- Turn off all power, protect any electronics you can't move inside with tarps, garbage bags and your hopes and dreams.
- Remember that you are not the only event to be shut down by extreme weather
- See Also Emergency Management

2

## Venues

## Other Venue Considerations

How many people are you intending to have?

- > This is often the time to consider cold-hard truths. Yes, your festival of experimental yodallet (that's yodellers who are also ballet dancers) is awesome.
- > But who will realistically be reached, interested, available, and able to invest time and money into attending your event (yodallet ain't cheap!)?
- > Balance these truths about your festival with the capacity of the venue you are considering. Is the venue an acceptable size, given the kind of festival you are running? Is it too big, too small?



How much power is available (number of breakers, sockets, etc), and is it enough for the festival you have planned?

Venue managers should know this!

What day of the week is it?

- > Just as prices go up at least 20% percent if you're booking things for a wedding, so to do prices fluctuate depending on the day(s) of the week you intend to have hold your festival.
- This doesn't mean you don't have to change your planned days, but it's worth looking into whether holding it on off-days (Mon-Wed) is cheaper in the long run.

Do you have to pay for additional staffing (security, technicians, bartenders, etc)? In most rental contracts, the venue will supply a certain amount of people for your event-- bars will typically supply one or more bartenders/servers, a few security guards, and maybe a doorperson/coat check. Other times, these costs will be outside of the contract, but you will be required to pay the venue directly individuals based on your event type and size (outside of the costs of the contract.) If you are clear and direct about the scope of your festival, most venues will be able to provide you with a solid idea of how much it will cost you (and the ones you really want to work with will put it in writing.) A couple of things to keep in mind:

### Security

- > Ensure that the venue's security team is licensed, and that all members of their security team carries their license while onduty (Ontario issues licenses that can apply to both security guards AND private investigators. Seriously, you could have, like, Veronica Mars on your security team).
- Ask if their security team is mixed gender, and if so, if you can have team members of multiple genders work your festival.
- If it's an event that has alcohol at it, definitely don't ask your friends or family to act as security for your festival (unless they are licensed Veronica Mars-security guards.)Yes, even Steve, who's 6 foot 7 and could probably beat all of the American Gladiators at once. Just trust me: you do not want to deal with the aftermath of Steve and your mom trying to remove drunken hecklers from your festival.
- > Security guards are generally hired by the hour for a minimum of four hours (this varies wildly from place to place)

#### Bartenders/Servers

- > Licensed venues will typically include one server as part of a standard contract.
- > Ontario requires anyone who serve alcohol as a profession to be licensed with SmartServe. Make sure that this venue is up to snuff on that one. If you are providing your own servers/bartenders, same rules apply!
- Like security teams, additional bartenders and servers are generally hired by the hour for a minimum of six hours (though, again, this number can vary!)

### **Technicians**

- This is an area a lot of people forget, and venues generally do not cover costs. If you have any technical (lights, sound, projection, a portable stage, etc) needs beyond, say, plugging in an iPod to their in-house system, you will probably need at least one technician.
- > Technicians are generally paid by the hour for a minimum of 4 hours, though they can also be paid by a flat-rate or day-rate if your festival is happening over a longer period of time (which might be cheaper for you in the long-term.) Don't be afraid to ask if there is an alternative pay scale to hourly!

## By-laws + Permits

Planning your festival requires an extensive amount of planning and discussion with the City of Toronto. After planning your programming you need to consider everyone else that lives and works in the area around your chosen venue.

## **Noise Permits + Exemptions**

Noise, as defined by the City of Toronto Municipal Code, Chapter 591, is unwanted sound. Noise by-laws are extremely important if you are going to consider putting on your own festival in the Greater Toronto Area. From public parks to city streets there are going to be people everywhere; people that may or may not be interested in your festival. You need to understand the area you plan to put your festival on, and who is impacted by the noise. When you are planning a festival, you may need to apply for a noise exemption permit. Here are a few points to consider when deciding if your festival needs one:



- Sound emitted from any equipment shall not exceed an Equivalent Sound Level of 85 dBA when measured 20 metres from the source over a five-minute period.
  - Note: dBA is essentially the measurement of how loud a sound is.
  - A great comparison guide for dBA levels can be found in the References!
  - To compare 85dB is the same as if you were inside a car and could hear the city traffic.
- If you are bringing in large speakers in the pursuit of playing loud music you will need the noise exemption permit.
- Picking your venue is crucial when thinking about noise violations. Most areas whether they are residential or commercial have a large population of people that are not attending your event. You have to think about who is affected by the noise at all times.
- If you exceed the noise limit and do not have a permit, you will be shut down.

## Completing Your Application

To complete your noise exemption application you need the following information:

- Your name, address and phone number
- Date, time and location of your festival
- Predicted number of attendees
- Site plan

How much does a noise exemption permit cost?

As of 2015, the cost of your permit costs a total of \$100.

Where do I apply for a noise exemption permit?

- You can submit your noise exemption permit at the ML&S (Municipal Licensing & Standards) district office.
- For information on which district you are in, you can call 311, or you can check out this handy map.

## **Alcohol/SOP Permits**

If you are including the sale and consumption of alcohol on your festival grounds you have to understand that it is a risk that needs your full attention. Understanding who is at your festival and how alcohol may fit in is incredibly important in all points of the planning process. Alcohol at your events can cause you a headache and you need to be informed about the do's and don'ts.

Do I need a permit to sell alcohol at a festival?

- The short answer is Yes.
- The long answer is Yes.



## Things To Consider

- > Serving alcohol at a festival is a great way to earn revenue.
- > Legal drinking age in Ontario is 19.
- > If you are allowing alcohol to be consumed throughout your festival grounds, you need to make sure you are checking for ID. It would be a good idea to hire extra security.
- > With alcohol comes safety issues such as injury and debauchery can and will happen, so make sure you have properly trained staff in order to keep an eye on things.
- > Servers must be Smart Serve certified.
- > Your volunteers and staff need to be trained properly in order to serve alcohol to anyone. You are legally responsible for any illegal consumption of alcohol on the premises.
- > The easiest way to ensure that alcohol is only consumed by those of age is to have a separate area that only those with proper government identification can access.
- > These 19+ areas must be sectioned off and a security guard must be stationed in order to prevent those without identification from getting in.
- > Once identification has been checked you can stamp people's hands to validate anyone who has provided the necessary identification.

## When can I start selling alcohol at my festival?

- > Alcohol serving laws are the same for everyone across Ontario.
- > Everyday of the week you can only serve from 11:00 am to 2:00 a.m the following day.
- > The only exception to this rule is on New Year's Eve where you can serve until 3:00 am.

## How do I get an alcohol permit for my festival?

- > To acquire your alcohol permit you must apply through the Alcohol and Gaming Commission of Ontario.
- > Your festival most likely falls under the Public Events category, and therefore you must apply for an alcohol permit in order to sell or serve alcohol at your festival. You can also advertise and use alcohol as a source of revenue.
- > Your team must apply at an LCBO SOP (Special Occasion Permit) service store at a minimum
  - of 30 days prior to your festival. We suggest doing it earlier however as you do not want your festival to be dry when you open the doors.
  - > Outdoor festivals require more time than indoor festivals and you need to inform more people about your festival. Specifically, you will need to inform the city, police, and the fire and health departments in order to complete a successful alcohol permit.
  - > For outdoor festivals you must inform the above parties at least 30 days before your festival if you are expecting less than 5000 people to attend your event.
  - > If you are expecting more than 5000 people, you will need to allow for at least 60 days prior to your festival.
  - > When serving alcohol, or any food and drink, you will most likely require portable washrooms. Make sure that they are sanitary and placed in an accessible location



### **Food Vendor Permits**

While applying to get a food vendor permit, you have to follow Toronto Public Health guidelines. The main reason you have to jump through all these hoops is in the name of safety. Food safety must be an integral portion of your festival. Providing food for sale or for free is no different. The following information is listed on the City of Toronto website and must be followed in the name of Food Safety at your festival.

- Must complete and submit the Special Event Temporary Food Establishment Organizer Package to start the process.
- Provide each food vendor with a copy of the Special Event Temporary Food Establishment Vendor Package
- Collect completed vendor applications (three components)
  - Part 1 Special Event Temporary Food Establishment Application (For Vendor)
  - Part 2 Special Event Vendor Information Sheet listing the type of food being offered
  - Part 3 Special Event Vendor Booth (Layout)
- Forward all completed vendor forms to Toronto Public Health at least three weeks prior to the event.
- Notify Toronto Public Health of any significant changes to the original application.



#### Movie Presentation Permits

You might be thinking that screening The Avengers is what will put your festival over the edge of Pretty Good into the land of AMAZING (and you would be right-- it's an instant classic!) Keep in mind, however, that you can't just go around screening movies for an audience. For a public presentation, you must pay a licensing fee in order to show most kinds of movies (the exception being, of course, a film festival where people submit their own work.) License holders in Canada (Audio Ciné Films being a large one) will quote you based on your organization size, the kind of audience and event you have, and what kind of admission you are charging, among other criteria. If you're looking to sleuth out more information about Copyright and film presentation, you should check out the Copyright Board of Canada.

## **SOCAN**

#### **SOCAN**

The Society of Composers, Authors and Music Publishers of Canada (which, inexplicably, is shortened to SOCAN) requires the paid licensing of composers and music publishers in a variety of commercial settings, from festivals, to concerts, to (not making this up) parade floats playing music. Their commercial licenses can even extend to artists performing their own music live (seriously.) Their licensing scenarios are quite vast, and sometimes arbitrary, so it's recommended you look over their website to see if any of their scenarios align with your festival activities. For what it's worth, licenses for small events are not generally super expensive and typical run under \$100.

## Re:Sound

Re:Sound is similar to SOCAN, but artists and music creators are covered under Re:Sound, rather than composers and publishers. Their licensing scenarios are also large, but quite a bit more in-depth on their website. Most licensing scenarios for live events typically run under



Any plan that has ever been made is only as good as the back-up plan to that plan. If that sounds confusing, congratulations, and welcome to Risk Management.

## Contingency Planning

Whenever you create a festival, you need to think that everything that could go wrong with your plan, will go wrong. There should be no amount of planning done without thinking of what is your Plan B. All risks need to be assessed and you must make a separate plan that addressed all the possible risk outcomes as stated above. Things go wrong so build a contingency plan into your original plan.

## **Contingency Planning**

Mour

. a course of action to be followed if a preferred plan fails or an existing situation changes.
2. A plan or procedure that will take effect if an emergency occurs; emergency plan.

## **Emergency Management**

How do you react under pressure? There is only one rule of emergency management:



## Don't. Panic.

Remember that the only major concern during an emergency is the safety of every single person at your event. Nothing else matters. Have a clear plan to deal with a variety of circumstances. If this is your first time planning contingencies, a good way to think about it is "IF, THEN, WHAT?" and fill in the fill in the blanks. MOST IMPORTANTLY, when you have completed your contingency planning, relay the relevant information to your front-line staff and volunteers. They are your eyes and ears for the festival, and they will mostly likely be the first people on scene in an emergency situation.

Fire + Other Things to Evacuate
In case of fire (fire alarm or anything requiring vacating the premises),

- > Stop the event, Drop what you're doing, and Roll everyone out of there.
- > As the event organizer, it is your responsibility to ensure that all of your audience members as well as your staff members are in a safe space.
- > During or after the Roll out phase, call 911, and follow any instructions they have. Do a head count of your staff and volunteers to confirm they have left.
- > Liaise with the venue personnel.
- When emergency crews arrive, follow all of their instructions.

### Injury + Major Health Emergencies

- > Try to have at least one member of staff with First Aid and CPR training (and you should have it too!)
- > Use Common Sense. You probably don't need to call 911 for a sprained ankle; you probably should for a broken one.
- > If it is safe to do so, move the injured person out of the main event space and into a more private area.
- > Try to get as detailed an account of the events leading up to the incident as possible. Was the injury an accident, or as a result of something that happened during your festival? Is the festival or the venue in some way responsible for this?
- > It may seems calculating, but as an event planner, you need to know what has happened (from the injured person's perspective) in order to assist him or her, and also to plan any adjustments or next steps for your event.

Fights + Other Things that Bros do

- Especially at events where alcohol is served, fights are not an unlikely thing to occur.
- This is where having security comes in handy: people trained to break up fights and limit injury!
- If you don't have security and a fight breaks out, separate the fighters if you feel comfortable doing so, and/or if it escalates, call 911. And, because you can't be present 100% of the time, make sure that your staff and volunteers know that too.

## **Limiting Liability**

Liability, in the context of festivals, is about protecting yourself, your staff and your festival from litigation. Limiting liability can seem callous and also complicated, and also we are not lawyers here at TAF, so here are just a few (non-legally-binding) tips to help minimize your liability.

Disclaimer: If you follow these steps and still get sued, again, we are not lawyers here at TAF Guide. We suggest talking with your friendly neighbourhood Judge Judy for more (actual) legal advice.

- > Contracts. (yes, again.) Having signed contracts for as much of your event as possible can massively protect your festival. Following the directions of contracts is also a great way to keep from getting sued.
- > Know, and follow, the rules. You should know the laws, bylaws, and regulations that apply to your festival and make sure you are complying with them.
- > Contingency and Emergency planning. The creation, communication, and (if necessary) execution of emergency planning can head off so many potentially huge problems.
- > Exercise Common Sense.
- > Assume that not everyone will exercise the same Common Sense, and provide clearly articulated rules, regulations, and suggestions (yes, you too can have a "You Must Be This Tall To Ride The Ride" sign of your very own.)
- > If the worst does come to pass, Apologize. If you made a mistake, and you can admit it, you should. Quick action, acknowledgement of error, and a commitment to change can go a long way to mitigating legal and personal problems.



## Marketing + Social Media

Marketing can be the biggest challenge in creating a successful festival. Marketing is the only way for your audience to discover how awesome your festival is going to be.

Marketing tactics and techniques may vary depending on your audience but it is important to present a consistent image of your event, no matter the marketing channel. A minimum of two months of marketing is highly recommended for smaller festivals, meaning your marketing calendar should involve at least two months worth of content.

One of the best ways to start thinking about marketing is to determine your people, aka your audience. Defining your client will allow you to customize and develop a marketing plan that will be effective and perhaps have a competitive edge. Everything you say in your marketing should be reflective of your mission and who you are.

In the early stages of festival marketing plans, you will want to take into consideration the 5 P's of Marketing:

Product - The product you are marketing. In this case, product would refer to your festival.

Place- Where is the product sold? Where does the service (festival) take place? Does your location correlate with your audience?

Promotion- What means are you using to advertise? How are you letting people know that your festival exists? What platforms are you using to create a dialogue between you and your audience?

**P**rice- How much money are you charging your patrons? This will be determined by your budget and what you feel is appropriate for your audience.

People- Who makes up your staff? Who is your audience? How will they interact? Be sure to uphold customer service standards.

## There are four key elements to a successful marketing campaign

Energy, an Accessible Platform, a Strong Hook and Sharp Focus.

You will find that there is an element of research involved in the creation of a successful marketing plan. Each element of research has the potential to significantly impact your outcomes and provide invaluable insight. A thorough understanding of each of the following sections will help you determine which marketing strategies will work best for your festival.

> Market Analysis

This ties back to the idea of planning your festival to not overlap with any other events

- Consumer Research
- > Promotion Studies

How do you line up against your competition, and what are they doing that you can improve on?

Performance Evaluation

Not only can you measure the effectiveness of your marketing through the success of your event but also through many post mortem evaluations (See Also Post-Festival Protocols)

## Programmatic vs. Authentic Marketing

Programmatic marketing refers to the details of your event.

- > Name, theme and logo of event
- > Date and day of the week
- > Org name
- > Menu
- > Price
- > Deadlines
- > Address
- > Schedule
- > Event manager's name address and number
- > Accurate set of directions

Authentic Marketing is more so the creation of your brand. This type of marketing will define your values, which will in turn create an emotional investment from your audience. Authentic marketing is designed to connect with an audience, often directly. It is about building a conversation with your audience, in a manner that reflects both who your audience is, and what your organization or event is trying to be. In the digital age, social media has increasingly become an arena where authentic marketing thrives.

## Word of Mouth Marketing

Word of mouth marketing is an invaluable form of promotion. Contrary to popular belief word of mouth marketing is an outcome of hard work and does not necessarily happen naturally. Stakeholders, who are made up of both people on the inside of your festival and on the outside are great prospects for spreading the word. For example, volunteers, donors, publicity outlets etc. Feel free to exploit your team, even provide them with a press kit, so they have the information handy.

#### **Press Kits Should Include**

- **Cover letter**
- Press release
- **Event fact sheet**
- **Organization brochure**
- **Graphics**
- Tickets and posters



## Media Mailing Lists

To help get the word out for your festival you can send out your PSA or Press Release to various media lists. Press Releases should be an enticing piece of writing that provides all the relevant information regarding your festival, encompassed by:

- Who
- What
- Where
- Why
- > When

PRO TIP: Send out your press releases to various media contacts on a weekday afternoon so they will appear at the top of their inbox come morning. NEVER send out a press release on a Friday as it will get buried in their inbox and likely never seen. Finding media contacts can be daunting, but most information can be found on their respective websites. 45

## Social Media + Digital Marketing

Digital marketing is a large component of your marketing plan and can be tricky because it entails everything from online advertisements to social media. In this section, we will focus on social media marketing, as it is the most attainable way to promote a festival for emerging artists.

- Social media can be reflective of both authentic and programmatic marketing depending on the platform.
- For example, Twitter may be best used for authentic marketing whereas Facebook can support all the programmatic details of your festival. Timing is extremely important in the creation of social media marketing.
- You want to post your information at high traffic times to reach a bigger audience. Information regarding this is ever changing and can be easily found on the web.
- It has been said that it is best to post to Facebook between 10am and 4 pm Monday through Thursday.
- It may help to think about the nature of the platform: is it time sensitive like Twitter? Ór, can you boost posts like on Facebook?
- Much like traditional marketing, the creation of a calendar is the best way to outline and plan for the on-going marketing of your event. You will be able to coordinate who is in charge of every portion in a fair and equal way as well as the ability to ensure that every platform is getting an appropriate about of attention and a variety of postings.



## TIP: Check out social media scheduling tools like HootSuite or Tweetdeck

Choosing your social media platforms requires you to assess your audience demographics. Check out the chart below for more info!



**Platforms** 



Facebook



**Twitter** 



YouTube



Instagram



Vine



Pinterest



Snapchat



Tumblr



LinkedIn

## Best Uses for Digital Marketing

- > Highlighting contents from multiple platforms; "shareable" content (videos, image packages); a more professional, formal tone
- > Informal conversations; integration with Vine; participating in outreach through searchable topics
- Hosting longer-form videos, commercials/previews.
- > Image and short-video hosting; allows for informal conversation much like Twitter; showing a more human (but a still polished) element
- > 6-second video, less about traditional marketing, and more about brand-building (can you distill brand ideas into 6-seconds?)
- > Discipline specific tags and photos; more overtly consumer-based
- > Similar to Vine, but a more private conversation through photos and videos with your audience
- > Beautiful photos, so many gifs, short posts
- > Creating contacts with professionals and seeking out specific professional demographics



Bahman / Wikimedia Commons

### Social Media Platforms: Dont's

We don't need to highlight the many, many (many, many) social media failures by companies big and small. Social Media is a peculiar beast, and it can be pretty nuanced, but here are some general rules when it comes to things you should be avoiding on social media:

- > If there is a popular or trending topic, see why it is BEFORE inserting yourself into the conversation
- > Do not repeat the same canned answers to any question tweets; if nothing else, everyone can see them and they look supremely lazy
- > Do not create a social media account for your event unless you have a solid use for that account in the context of your marketing campaign.
- > Be careful about who you follow, friend, and favorite, even if they follow, favorite and want to friend you.
- > Don't forget that this is not your personal account. Social media lets festivals and organizations be more relaxed and even funny. But remember that a core professionalism should always inform how you present and interact with people online, and respect your festival and audience by maintaining that professionalism.

Operations- the OCD sister to planning your festival. Many things about operations are often overlooked, but are very necessary for

## Operations

the core of any event to go forward. Operations refers to the nuts and bolts of an event, the practical parts like "who's bringing the artwork?", "how are we transporting this 100-pound statue?", and "wait, we need a PA system?" Obviously, it is a huge, huge subject, and TAF is going to cover a few of the many topics surrounding Operations.

## Permits/Contracts/Agreements

We've talked about about permits, contracts, and agreements throughout the TAF Guide. From an Operations standpoint, all of these have two big jobs: 1) to exist, and 2) to be on hand in case anything goes sideways.

- > As the Event Organizer, you should keep copies of every single contract and invoice that is sent your way (which is just an excellent business practice), but specifically, keep them close before, during, and after your festival.
- > Should you have a smartphone, laptop, or other portable device (even something as fancy as a clipboard) to keep all of your contracts together and with you, you will have a quick reference point in case of dispute with suppliers, the venue, or anyone else who dares question your ALMIGHTY WORD.
- > These written words are your lifeline and your hammer: you can argue with people who are not living up to their end of the contract much more efficiently if you're not saying "I'm pretty sure it says..." and instead pointing to a written agreement.



## Management Structure

If you've ever worked on a group project for school, then you know that managing all of your work together can be difficult. The same is true for, well, pretty much everything else in life. That's why it's not only important to split up your work, but also to clearly lay out who does what. In business, it's called an organizational chart (or orgchart for fancy people.) Everyone else can call it the management structure, as we will do in this section. To be clear, this is just one way to run a festival, and it may not be the way that you run yours. However, this is a model that has been successful for us!

- Decide who will be your Head Organizer. This might be easy, if there's only 2-3 of you planning the festival. Who is a clear leader or head organizer for your festival? This person is the living embodiment of "the buck stops here." They are calm, rational, and are able to see the big picture of any situation. This should also be the leader in an emergency situation.
  - Once you have decided who your Head Organizer is, allow them to fill that role with whatever meaning they like. This doesn't mean allowing them to walk all over you, or send you out for coffee, or otherwise go all The Devil Wears Prada on you. What it means is supporting and respecting their leadership role, and working together to the best of your ability.
    - > Centralize your tasks for each person. If you need to rent from a number of sources, have one person act as the contact for all of them. If you have volunteers, choose one person to manage them. If you're working with an agent or a union, have one person facilitate that conversation.
      - > This doesn't mean that there cannot be crosscollaboration or conversation between individuals and across departments. But it does clearly define responsibilities and roles so people know what is within their own purview.
    - > Write down or draw a "chain of command" based on the previous two steps. Indicate where roles are within an organization and how they relate to one another.
      - > This can be awkward, as people will ascribe meaning to roles based on where they fit within a chart like this. Just know that every single role on your chart should be useful in its own right: if there's not a good reason to have a role in organization, don't put it in there!

## Logistics

Often forgotten during planning, logistics is a crucial aspect of operations. Logistics is the fancy way to say, "how the hell is this getting to/getting set up at the venue?" The job for planning logistics will expand and contract with the scope of the festival, so it's important to keep practicalities in mind when planning out logistics. Questions to consider when building a plan for logistics:

- > When are we allowed in the venue? when are we required to leave?
- > How much time is needed to prepare the space before the event?
- When are rented materials arriving? Is a team member picking them up?
- Do we have a licensed driver?
- Do we have a car/rental/truck?
- > How many people do we have to set up? How many to tear down?

More often than not, logistics ends up being expressed in Timelines and timetables for events. Just think, all those times you weren't just looking at your high school timetable, you were looking at a LOGISTICS table. (mindbloooowwwwwn)

## Rentals/Suppliers

Unless you are Tony Stark, chances are you will need to rent something within the course of your festival. There are a many rental companies throughout the GTA, and we aren't Google, so instead, here are some tips for renting:

- > Some suppliers have their price lists and images/descriptions online, but plenty more do not.
- > Do they charge delivery/pick up fees? Do you have the capacity (both time and effort) to pick up the rented material yourself and save a few dollars?
- > When you compare rental rates, see if companies have hourly/daily/weekly rates.
- > If it's possible, go visit the supplier, and see the equipment you're going to be renting. Often, it will not be until you see something that you have questions about.
- > Are you a student? If so, do they have student rates for booking?
- > Most places will not charge you to make a booking, unless you back out really late. Look at their terms and conditions before signing anything.



## Audience Relations

The visitor experience should be paramount in your mind when planning your festival - you worked so hard to get people to attend your festival, so make sure they feel welcomed, can get around easily, know where they're going, and have a great experience.

### **Customer Service**

You want to give your visitors everything they could possibly want to know about coming to your festival. Here's what to include on your website as early as possible:

- > Ticket information: when they go on sale, prices, where to get them, and if there are any special rates for students, seniors, or groups
- > Ticket policies: do you allow exchanges, or refunds? What are the late entry and re-entry policies?
- > Location: maps, car and bike parking information, closest TTC routes
- > Event maps and lay-outs: show where the stages are, where the food and drink stations are, and where the washrooms are
- > The time of your event: when doors/gates/venues are open, and when they close
- > Food and drink policies: Can visitors bring in their own? Or just water bottles?
- > If children are allowed at your event, include any pertinent information about childrens' activities
- > Weather conditions: Will you cancel your festival due to inclement weather, or is there an alternate venue you will use?
- > Accessibility information: are all of your venues fully accessible?
- > Contact information: Have a general e-mail address posted, or a feedback form, so visitors can get in touch with you.

## Way-finding

At any sort of festival, there are often many different things going on - often at once, sometimes at different venues. You may know the set-up like the back of your hand (hey, you just spent months planning it!) but you must look at your festival with fresh eyes, so you can find out what a visitor's experience will be like.

- > Signage is of the utmost importance are there signs leading up to your venue, and Is the entrance visible?
- > If there are different lines (let's say, one for picking up tickets and one for buying tickets), are they well labelled?

Make sure there are enough staff and volunteers at every location to give out helpful information, like where the washrooms are, how to buy drink tickets, and when the first artist is performing. This is where it's important to have all staff and volunteers well-trained with the pertinent information needed at that location.

## Accessibility

Ontario recently passed the Accessibility for Ontarians with Disabilities Act, whose purpose is to benefit all Ontarians by developing, implementing, and enforcing accessibility standards in order to achieve accessibility for people with disabilities of any kind. It aims to give people with disabilities great customer service. Keep this in mind when choosing a venue, and make sure to have an accessibility policy in place for your festival. The policy will cover things such as:

- > Making sure your location is accessible to anyone with a wheelchair or mobility device
- > Allowing support animals into your festival
- > Having large-print maps or programs available
- > Allowing someone with a disability a complimentary ticket for their support person

Disabilities can be visible or invisible. Never assume a visitor can or cannot do something. One of your visitors may have a mental health disability, or a visually-impaired visitor walking with a cane may still have some vision. A simple "How can I help you" is the best way to communicate, as it allows your visitors to let you know the best way they can be served.

## Complaints Equity + Diversity

No matter how hard you try, you'll probably hear complaints throughout the festival. You can't please everyone - which is why it's so important to be transparent and state any rules and regulations beforehand. This way you can manage visitors' expectations.

It's best to have a clear chain of command when dealing with complaints. For volunteers, they should never (or very rarely) have to deal with a conflict. They may not have all the information they would need to help, and frankly, they're not volunteering their time to get yelled at. Make sure they know who to refer visitors to, and how to contact them. Maybe it's a member of the Front of House staff, or one of the festival managers. Decide in advance what kind of conflicts should be sent up the chain, and who has the power to resolve different conflicts.

Here are some conflict resolution tips if you have an angry visitor:

- Let them have their say people often just want to have the time to talk and get their point across.
- Keep your voice low and calm. They will feel silly continuing to yell and hopefully lower their voice to match yours.
- Try to separate yourselves from other employees and visitors so you can focus on the conflict.
- Repeat back to them what you understood the issue to be. Often people will get frustrated because they don't believe they've been heard, so clarifying the issue will help get everyone on the same page and bring the conversation back to the main point.
- Let them know you understand their anger and empathize with them, making sure to stay neutral. It's hard not to get upset and take it personally, but it can aggravate the situation.

Jona Stuart / Wikimedia Commons

- Don't assign blame on anyone or anything, just focus on coming up with a resolution.
- Apologize, and say something like, "Let's see what we can do to resolve this issue for you" and come up with possible solutions.
- Thank them at the end for their feedback. Whether people are complaining about ticket prices, long line-ups, expensive parking, too few washrooms, or the choice of artists, it may be useful for planning your next festival.

Toronto is said to be the most culturally diverse city in the world, but you wouldn't always know it to look at the performing arts landscape. Often marginalized communities are left out of mainstream events, and highlighted only during specific cultural festivals. In a festival setting there are multiple performances and artists, so there should be lots of opportunities to feature diverse performers and art forms. Take advantage of Toronto's vibrant, multicultural scene, while expanding your audience at the same time. Don't know where to start? There are toolkits available to help you engage different audiences, such as the toolkit from Cultural Pluralism in the Arts Movement Ontario (CPAMO), which is available in the References!

## **Tools for Meaningful Diversity**

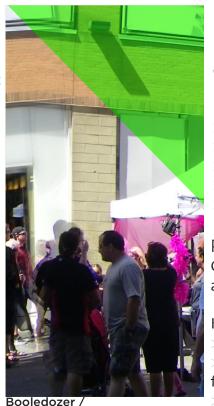
- Place a high priority on including equity and diversity throughout the festival planning process, including in the planning committee and all policies and procedures
- Do your research: Use Statscan data to find out about the diverse make-up of your neighbourhood
- Look into partnerships with local community groups. Are you a student or recent grad? Your school's cultural clubs may be a good place to start
- Discuss and be aware of possible challenges to diverse artists in becoming involved in your festival
- Admit what you don't know: Talk to multicultural leaders in your neighbourhood to get ideas on how to plan your festival to be more inclusive
- Putting out a request for artists on your website? Clearly state that your festival welcomes people of all backgrounds
- Think about using the common languages spoken in your neighbourhood in your marketing, and on your website.

Congratulations my friend, you have made it through your first festival planning experience! But your work is not done just yet. In the precious time after your festival wraps you can learn a lot about what worked and what didn't and where you can improve in the future.

Throughout the planning and execution of your festivals you will have likely created a mass of documents detailing the venues used, the contacts made etc. After the festival has finished you may want to go back and review the documents you have created and create a debrief meeting. Please ensure to include whatever staff and volunteers you have in this process as everyone's experience may be different but each piece of input will be valuable for the future. You may ask yourself, why bother? Here is why...

- Learn from successes/mistakes
- Funders increasingly request this type of information
- Understand, verify or increase impact
- Improve delivery mechanisms for marketing
- Verify what you think you're already doing
- Produce data or verify results for future promotions
- Produce valid comparisons
- Fully examine and describe what you and your team found to be most effective

## Post-Festival Protocols



Wikimedia Commons

### PROJECT MANAGEMENT EVALUATIONS (PME)

Examines the how of project delivery, following the festival. Conducted by project team and other stakeholders as an objective view of the event's successes and failures.

#### **Key Questions:**

- Was project delivered on time and budget?
- Were risks identified and addressed?
- How effective were project communications?
- How did everyone work together?
- Was change managed well?

## PROJECT IMPACT EVALUATION (PIE) Outcome measurement of results not activities, following the festival.

#### **Key Questions**

- What good does it accomplish?
- Are we doing the right activities to facilitate desired outcomes?
- Provides focus for program work via clear definition of outcomes
- Assess progress and direct future initiatives
- Information for improvement
- Motivator for staff
- Recruitment tools for volunteers
- Successful positioning (additional promotion and support)

#### PROJECT DELIVERABLES (PDE)

**3 Tools for Solid Evaluation** 

Examines quality of deliverables via comparison against standards (internal or external best practices)

## **Key Questions**

- How were the program goals established
- Was the process effective?
- What is status of progress/achievement?
- Does staff have adequate resources/money/ equipment?
- How should priorities be changed?
- How should time lines be changed?
- How should goals be changed?

service delivered, for example how many productions you featured in your Theatre Festival. Here is a list of areas and examples you may find helpful in doing your post festival evaluation.

It may help to understand the difference between project outcomes versus project outputs.

Project outcomes refers to the benefits or changes for participants that you made during or

after their involvement with the festival. Whereas outputs refers to the number of units of

- Financial accountability
- Program outputs (delivered)
- Adherence to standards of Quality and Service

Participant related

- measures (surveys, polls, numbers of complaints)
- Satisfaction

Don't forget to plan yourself, your team, and your volunteers a sweet wrap party to celebrate your festival!



## SWOT Analysis Template | Sample Risk Management Form

Strength	Weakness	Risk	Probability (Likely/ Unlikely)	Risk Level (Low/Med/ High)	Effect	Action Type
		e.g Fire	Unlikely	High	> Major Safety/ Injury concern > Damage to property	<ul><li>Distribute fire plan to staff</li><li>Discuss fire plan with venue</li></ul>
Opportunities	Threat					
		_				



## Sample Budget Outline

#### PROPOSED ACTUAL \$ \$ REVENUE Earned Revenue Box Office/Admissions # of Tickets Ticket Price Proposed Sales (final report only) Actual Sales and commissions Specify Fees / Guarantees Specify or attach explanatory note Other earned revenue Total Earned Revenue Private Sector Revenue Individual donations Corporate donations Corporate sponsorship List name and amount Foundation grants and donations Fundraising events Specify or attach explanatory note Other private sector revenue Total Private Sector Revenue Government Revenue OAC grant request/amount Name fund or agencies. Pending Confirme Other Ontario provincial Federal

Total Government Revenue

**TOTAL REVENU** 

Municipal

revenue

Other government

## Adapted from the Ontario Arts Council's Budget Form

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## Sample Marketing Calendar



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## References Section

Below, you'll find references for TAF Guide's work, and some next steps for research. There is lots of overlap throughout the sections, so resources are only mentioned once!

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## Programming

- > CAEA (Canadian Actors' Equity Association) CAEA Festival Policy
- > CARFAC (Canadian Artists Representation Le Front Des Artistes Canadiens)
- > CARFAC Canadian Artists Representation Copyright Collective Information about using visual artists work in festivals
- > Sample Booking Agreement

### Venue

City of Toronto Parks Rental Info

## Bylaws + Policies

- > Audio Ciné Films
- > Alcohol and Gaming Commission of Ontario Alcohol Permits and Rules
- > AGCO Special Occasion Permit Application
- > City of Toronto DineSafe Information about Special Event Food Regulations
  - > Food Vendor Application Form
  - Special Event Temporary Food Establishment Vendor Package
  - > Special Event Temporary Food Establishment Organizer Package
- > <u>City of Toronto Ward Profiles City of Toronto</u>
- > Galen Carol Audio dB Reference Guide

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> Contingency Plan Dictionary Definition

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