

No Fest For The Weary:

Leverage's
**No-Nonsense Guide
to Festival Planning**

If you're here, chances are you dream of launching a festival that brings together a community of people around a shared love: music, art, culture, food - you name it. You aren't taking this lightly. You've already done some research and know that planning a festival is no small task. It requires tremendous time, sacrifice, money, labor, and organization. *This guide will help you take your festival from a pipe dream to reality.*

Every event has unique needs, but within this guide is the framework for planning and launching a festival your audience will want to attend. We'll cover:

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Establishing Your Vision

Create a Roadmap

When planning a festival, like any other event, it's essential to establish the who, what, when, where, and how. Use this list of questions to begin your roadmap.

WHO

- Who is your target audience and demographic?
- Who or what will be the featured attraction?
- What are the event highlights and additional entertainment or vendors?
- Who are your food and beverage vendors?
- Who do you need on your team to execute your vision?

WHAT

- What is your festival's name?
- What is your festival's theme (e.g., culture, music, food, film, community, etc.)?
- What is your weather back-up plan (if outdoors)?
- What is your festival budget?

WHEN

- When will the festival take place?
- When (what times) will the festival open and close?

WHERE

- Where will the event take place?
- Where will patrons, volunteers, vendors park?
- Where is funding coming from?
- Do you need festival sponsors?

HOW

- How will patrons buy tickets?
- How will patrons enter the grounds (e.g., gate, security check, etc.)?
- How are you measuring the success of your festival?

This roadmap is your starting point. Add details to it, remove details from it, whatever you need to do to make it your own and be fully prepared for the journey ahead.

Goal Setting

Now that those questions are answered, you must address one last big question: Why? Determining your “why” identifies the soul of your festival. The goals you set now will continue to guide your festival down the line - for better or worse. The goals should be both achievable and measurable. Whether it is selling a certain number of tickets or booking a major headliner, choosing the right goals and KPIs will keep your festival’s vision on track throughout the planning process.

S pecific - A goal is specific when you can concretely describe it to others.

M easurable - You need to be able to tell when you’ve accomplished it.

A ttainable - It can’t be a pipe dream or something unrealizable.

R elevant - A goal is relevant when it references your values.

T imely - Goals are not open-ended. They have dates attached.

Support Team

Ask any longstanding festival runner: your core team, or committee, is one of the most critical factors in the success of an event. Assemble a multifaceted team of committed and connected folks who share your passion. Stretch your circle! You’ll want people from all walks of life with various strengths, such as fundraising, event planning, construction, customer service, and communications. In addition to standard positions - president/chair, vice president/chair, secretary, and treasurer. Here are a few other positions you may want to consider for your festival board or committee:

Volunteer Lead: Responsible for finding, scheduling, managing, and stewarding festival volunteers.

Sit & Security Lead: In charge of maintaining the festival venue and coordinating security teams.

Hospitality Lead: Handles backstage accommodations for staff, entertainers, vendors, and others.

Vendor Lead: Coordinator and point-of-contact for all vendors; responsible for vendor load-in/out.

Entertainment Lead: Researches, books, and communicates with musicians or other entertainers.

Navigating Public Health & Safety *Due Diligence*

At the onset of your festival planning, research local health and safety requirements and inform yourself of any mandates and ordinances in place. Contact the local public health office and set up a meeting to review your ideas, concerns, and questions. Get event insurance; many vendors and entertainers won't work with you unless your event is insured, and you don't want to risk going without it anyway.

Above & Beyond:

Think of your most memorable festival experience. What stands out? Successful festivals aren't successful because they secure the biggest talent or spend the most money. Though those factors are important, successful festivals succeed because they prioritize people. Your patrons are in your care so long as they're on festival grounds. Your prerogative and responsibility as an event organizer is to go above and beyond to ensure their safety.

Here are a few other tips to consider:

- Having medical staff on site is an excellent way to protect guests in the event of an incident.
- Post a list of prohibited items at bag checks before attendees enter the gate.
- Some event planners opt for heightened security with metal detectors to minimize risk.

Outlining a Budget & Funding *Money, Honey*



Putting on a great festival is not cheap. Luckily, there are ways to help offset costs. You can secure extra funding from corporate or private sponsors, look into local grant funding for community events, or secure a loan for your event. There will be unexpected costs along the way, so the more prepared you can be now, the better. **The following page contains a Festival Budgeting Tool to jumpstart festival budgeting.**

Festival Budgeting Tool

SITE

- Internet Access
- Festival Tents (Vendors, Production)
- Fencing
- Golf Carts
- Portable Restrooms
- VIP Bathroom Trailer
- Trash/Recycling Collection

TOTAL:

STAFF

- Security
- EMS Medical Services
- Site Manager
- Production Manager
- Volunteer Manager
- Marketing Manager
- Hospitality Line Manager
- Merchandise Manager
- Front Gate Ticketing Manager
- Labor Hands, Runners

TOTAL:

PRE-PRODUCTION COSTS

- Print, Postage, Other Mail
- Gas/Fuel
- Hotels, Accommodations for VIPs
- Runners/Transportation for VIPs

TOTAL:

ANNUAL OPERATIONS

- Business Registration and Fees
- Sales Taxes

TOTAL:

PRODUCTION

- Entertainment (Musicians, Performers)
- Stage & Facade Design Materials per Stage
- Sound & Lighting (Equipment, Staff, Rental)
- Production Generators
- Radios, Headsets Rental
- Stage Hands, Crew

TOTAL:

TICKETING

- Wristbands
- Backstage Lanyards
- Ticketing Fees
- Postage/Shipping
- Hard Ticket Stock (if printing tickets)

TOTAL:

MARKETING/PR

- Website Development
- Flyers/Posters, Design and Print
- Programs/Schedules/Maps
- Email Marketing
- Web Hosting, Email Hosting, and Domain
- Social Media Advertising
- Google Paid Search
- Misc. Graphic Design and Print
- Radio Ads
- Merchandise, Branded Items
- Signage/Other Banners

TOTAL:

GRAND TOTAL:

Securing a Venue

Your Happy Place

Booking a venue should be the first significant commitment you make. Once the venue is decided, the date secured, and the contract signed, you can move forward with all the other details of your festival. The chosen venue seriously impacts a festival's two most important influences: your budget and your vibe. Sure, it needs to accommodate the specifics of your event, but it should also complement your theme, align with your goals, and attract your desired audience.

Some things to consider:

1. Review the Contract:

Review the contract, gather your committee's feedback, and ask questions.

2. Max Capacity:

Does the venue have enough space for the anticipated number of guests? Overcrowding is not only unpleasant for guests, but can become a safety hazard.

3. Parking & Camping:

While these are highly dependent on the type and location of your festival, it's often overlooked. Keep your attendance goals and the max capacity of your venue in mind when evaluating space for parking and camping.

4. Don't Trust The Forecast:

If it's an outdoor venue, plan for all weather possibilities. In case of heavy rain, for example, you may consider providing tents or other structures to shelter under.

5. Go With The Flow:

Plot a rough idea of how you would lay out your festival within the space. Ensure there's enough space for food and beverage providers, vendors, and entertainment - plus an intuitive flow of foot traffic between all locations - without being too crowded.

6. Technology & Power:

What technology and electrical needs does your festival have? Is your venue up to the challenge? Understanding the capabilities and limitations of your venue is paramount.

7. Wayfinding:

What kind of signage will you need to design, produce, and hang prior to the festival? How will patrons find their way around the venue? What navigation tools will be the most helpful to not only patrons but vendors, entertainers, and volunteers as well? We have a solution for this in our Taking Care of Logistics Section!

Festiv-ALL

The most beautiful thing about festivals is that they unite people from all walks of life. No one should be excluded based on their physical, mental, or intellectual ability. Ask the venue coordinator for their ADA compliance or accessibility plan for the space. If they do not or cannot provide enough information, collaborate with your festival committee and local public health and safety office to develop a solid strategy.

Look into golf cart shuttles between parking areas and the main festival gate. Provide noise-canceling headphones for veterans and sensory sensitive patrons to rent from a centralized location on festival grounds. These empathetic investments above and beyond the required standard make a huge difference for so many individuals who often cannot attend festivals without them.

Creating a Marketing Plan

What's in Your Festival Marketing Lineup?

Your available resources - time, people, talent, money - will have a significant influence on what strategies you pursue. Be sure to build a marketing strategy that is realistic and attainable. As your festival evolves during its initial years, you might need to increase your efforts to match its growth. Collaborating with a knowledgeable marketing committee or team can elevate your festival from ordinary to extraordinary, making it the best it can be!

The Rookie

- Brand Identity Basics
- Social Media Engagement
- Local Press
- Free Community Calendars
- Word-of-Mouth

The Seasoned Pro

- Everything to the Left
- Hire a Creative Team
- Website Development
- Digital Ads
- Billboards
- Print Media
- Branded Swag

The Festival Master

- Everything to the Left
- TV and Radio
- Regional Advertising
- Exclusive Swag
- Assemble Street Crew
- Corporate Partnerships

Get Creative

There's a lot more to marketing a festival than meets the eye. It's time to rely on your creative intuition and think outside the box. You can offer social media contests and giveaways to garner hype around the event. Consider giving a few tickets to local media outlets to help drum up interest. Regional press outlets, community groups, and libraries may also be willing to spread the word. Approach local companies with the opportunity to sponsor (pay for) your marketing efforts in exchange for advertising at the festival.

Maximum Impact

Think intentionally about your target audiences (yes, you probably have more than one) and where they'd spend the most time. If you're trying to attract young adults, does spending money on magazines and print advertising makes sense? Or would allocating more of your budget to digital strategies be the wiser option? Likewise, if you're planning a music festival, you can bet on radio, Spotify, and social media advertising. When in doubt, focus on digital marketing rather than print. It's wise to invest in paying someone to build a website to show audiences your event is legitimate.

Decor & Signage

Entertainment is everything, but the atmosphere is important too! Wayfinding and directional signage are of the utmost importance. If budget allows, there are many ways to enhance a festival visually. Working consistently with a single trusted designer is a smart decision, as it builds better brand consistency and enhances the look and feel of the festival - especially from a patron experience perspective. Strategically placed banners establish your event's notoriety as guests enter and leave. Include sponsor logos on the signage too! You want your sponsors to feel like their investment is worth it. Consider engaging art exhibits you could arrange as an engaging attraction for guests en route to other locations. Sky's the limit.

A planned marketing strategy is the agent of success for your debut event. If you're just getting started, ***how your event makes people feel will be remembered much longer than how high your profits were.*** Stay true to your goals, and spend your marketing budget wisely.

Taking Care of Logistics

Let's Get Down to Business

There are many moving parts to consider in the scheme of festival planning. Consult your committee to ensure any blindspots are covered, but use this checklist to get started:

✔ **Schedule of Events**

Don't let your excitement for the day-of obscure you from planning a full event production schedule from load-in to load-out. Remember to build in some breathing room between the main attractions. Prepare an executive schedule for your committee and a more streamlined version for vendors, entertainers, and others.

✔ **Legalities**

You can contact a lawyer or legal writer for help with contracts, terms and conditions, ticket return policies, or any other legal documents. When taking on this much liability, even with an excellent event insurance policy in place, it's a good idea to establish a relationship with a legal team early in the process.

✔ **Ticket Sales**

Some festivals are free to attend, and some aren't. If you plan to sell tickets, you'll want to research ticket vendors before landing on one. Figure out when and how tickets will be sold. Even if your festival is free to enter, your attendees should go through some formal entry process - getting wristbanded, for example.

✔ **Tech & Internet Access**

Remember electrical needs during all phases of planning your event. How much power will food vendors need? Are you hiring tech crews to handle lighting and sound? Is internet access available? Is your festival in the middle of nowhere with barely any reception whatsoever? Plan accordingly.

✔ **Stay in Touch**

How will you, your committee, and your volunteer leads stay in touch throughout the day? Many festival teams use communication apps like Slack to stay connected throughout the festival. If internet or mobile reception is unavailable, you could rent radio headsets to wear throughout the day.

✔ **Restrooms & Respite**

If your venue has no bathrooms, you will need to work with a portable restroom vendor. Festival-goers are on their feet a lot. Keep restrooms clustered for convenience and strategically place benches, picnic tables, and other accommodations in areas near food vendors and shade.

✔ **Clean-up**

Make sure you have organized a well-staffed clean-up crew. Be prepared with enough trash bins, bags, sanitizer, and other supplies. The team should monitor the site regularly for the duration of the festival. If your festival is remote, remember that trash has to go somewhere.

✔ **Idiot Check**

At several points leading up to the event, take your map and production plan to the site with your committee. Going to the venue plan-in-hand helps you visualize what is to come. One last walk-through should occur the morning before the festival opens, with “runners” on standby to procure last-minute needs.

Assembling Your Team

All Hands on Deck

With a well-rounded expectation of your festival's ins and outs, now's the time to assess your volunteer and staffing needs. You may be working with an all-volunteer team while your festival is getting off the ground or if your festival is a charitable, nonprofit organization. People love to feel part of something big, and great volunteers are invaluable. Nonetheless, be prepared with extra help; there may be no-shows or team members who need to leave the premises early.

Invest in branded t-shirts with "volunteer" or "staff" across the back. (Pro-tip: If this is cost-prohibitive, find a corporate partner to sponsor your volunteer team! Add their single-color logo to the t-shirt design in exchange for their help covering the cost.) Be intentional with the color shirt you choose. If your volunteers wear black shirts, they'll blend in with the crowd - go bold. You may want to invest in other formal IDs for your team, such as lanyard badges or backstage passes.

A Bit Like Herding Cats

Your committee's volunteer lead will need to become familiar with a volunteer management system and train others so that everyone is on the same page. This system will include a master volunteer schedule, descriptions of roles and responsibilities, contact information, and any other relevant information. Post the volunteer opportunity on social media, volunteer website listings, and local bulletin boards. Use this volunteer sign-up form to gather initial information from your people - don't forget to customize it as you see fit!

Enjoying the Festival

*Take a step back. Take it all in.
You made it.*

Be Prepared

Nothing can sabotage an event quite like a lack of planning. Forethought prevents emergencies. Steer clear of disasters and keep your mind relatively stress-free by working out all the details beforehand. The day of your event should be spent watching everyone enjoy themselves and taking care of the necessities. Directing staff, answering questions, and putting out fires will consume most of your energy, so rest and soak it all up when you can.

Evaluation

Without being too self-critical, observe throughout the day how all the event components function. Take a deep breath and ride each wave - you've been on quite the journey. Diligently take notes throughout the festival, and make sure your committee is doing the same. Check in with your leads frequently and gather their feedback in real-time. Go back to your goals - how did you do? What worked, what didn't, and what do you want to do differently next year?

Post-Fest

In addition to informal chats with key stakeholders throughout the festival, schedule a formal post-festival debrief with your committee for the morning after your event wraps all final clean-up and load-out measures. Schedule an additional debrief 30-60 days after the event for your committee and volunteer leads; some space allows folks to collect and organize their thoughts fully. Remember: in many ways, running a festival is a year-round job. Plan to meet with your committee at several points throughout the year.

Thank You, Thank You Very Much

Last but not least, promptly thank sponsors, vendors, volunteers, and patrons for their contributions to the festival. A personal note mentioning the specific contributions of each sponsor is strongly recommended. You will want their sponsorship next year, so steward those relationships wisely. Have your vendor lead coordinate a proper thank you for the vendors. Consider throwing a volunteer-appreciation picnic before your next festival to drum up excitement and jumpstart volunteer registration. Lastly, thank your committee members personally and celebrate all you've accomplished on your journey together.

Now that you have a better understanding of the *journey ahead...*

At Leverage, our team works one-on-one with event organizers like you to personalize your branding, fulfill the needs of each unique event, and turn your vision into reality. We can help you promote your event through print media, digital ads, website development, branding, press and media, email campaigns and automations, and more. Contact us for a consult - we'd love to build something for you!

Check out other festivals and fundraisers we have worked with!



Get in Touch

hello@leverageadvice.com

616-935-7020