



## Festival/Event Checklist

*Note: the state laws regarding almost every item on this checklist are inherently unique for each state. It is vital that legal counsel be sought to clarify the legality of each step as you plan your event.*

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## Most Festivals are Awful

In her article, “Why? An Introduction to Festival Planning”, Hope Tschopik Schneider, credited with producing one of Los Angeles’ most important festivals, The Olympic Arts Festival in 1984, most eloquently explains the festival experience:

“Festivals are not necessarily “good” things nor are they always very good parties or great communal celebrations. Indeed, most festivals are awful. They present local artists under bad performance conditions, on temporary stages, using rented sound systems. This to a bemused audience unsure of who is performing, who sit in the sun on rented folding chairs with children who are uncomfortable and restless, surrounded by a sea of people who are milling about, looking for food, shopping amidst assembled street fare items, inhaling the delicate smell of fried food mingled with the even more exotic fragrance of porta-potty chemicals.” ...

I do think it is possible to create a Festival, a festival of value, distinction and purpose. To do so requires real integrity of purpose (WHY?), real definition and intimate understanding of its audience (FOR WHOM?), a real commitment to the uniqueness and quality of the artists to be presented (WHAT?), and a real sense of the magic of place (WHERE?). It also requires enormous hard work in both planning and implementation. In essence, because a festival is a series of one-time, unique events with new combinations of people, there is no room for error and no time for refinement. It takes enormous resources to do a festival well, either in the form of a highly motivated and involved community or in the form of large sponsorship/funding commitments. Festivals, once the definition of who, what and why is set, are exercises in precise technical and production planning. There are endless details to run down and nail to the floor. There are fundraising, accounting and cash flow problems to solve. There are production problems to solve. There are audience amenity problems to solve. There are public assemblage and flow problems to solve. There are political problems to solve. There are huge marketing and public relations problems to solve.

Festivals, no matter how small or community based, require a staff of vision, expertise and commitment, an ace technical crew, brilliant marketing and real dollars, up front.”

You can read more about festival planning in the excellent free online festival handbook, “[About Festivals](#),” produced by Los Angeles Department of Cultural Affairs. It’s not beer festival specific, but this Adobe pdf document is a compilation of articles from various contributing editors, including Schneider, with some fantastic insights into the myriad of considerations surrounding successful festival execution.

Many guilds successfully partner with outside organizations to put on their major fundraising events. This is an outstanding way to minimize upfront costs, liability, and resources. Advanced guilds nationwide have wonderful events that are organized almost entirely by the guild director, but building these events has been a process of years, or in some cases, multiple decades of experience. Those incredible guild sponsored festivals come at the cost of many hard-learned lessons. Indeed, event partners and/or sponsors are key to developing a successful event for guilds both new and veterans to the event planning process. Recruit committee members from groups whose goals are compatible with those of your festival. Consider promoters already producing your local well-established beer festivals, 501(c)3/6 state Not for Profit Corporations, representatives from arts councils, farm market associations, civic organizations, colleges and universities, and state and local departments of tourism or agriculture.



Event partners or sponsors add experience and expertise, often assisting with up front funding, and offer fundamental connections for the venue, food, porta-potties, musicians, and volunteers. They can strengthen your credibility, generate publicity, and donate goods and services for the event. It's vital the organizing team clearly define the roles and responsibilities, physically and financially, of each participating organization to help the committee work effectively and stay on track throughout the process.

More resources for special events: <http://nonprofit.about.com/od/fundraising/a/specialevents.htm>

Guild sponsored events are not a way to raise a lot of money immediately. They can be a part of your strategic plan to cultivate future fundraising, and to boost the profile of craft beer in your community. Eventually, after spending a lot of money, learning what works and what doesn't in the state, and the careful construction of a strong event program, festivals commonly become guilds' number one income source. Unfortunately, one bad event raises all levels of red flags for craft breweries and our highly regulated industry. Events involving alcohol of any type MUST be consciously planned and executed with the utmost competence, or the results could be detrimental.

We've created a basic checklist of best practices through the collaboration of our award winning events team and leaders from guilds nationwide that put on major fundraising festivals. There are books out there on putting on successful festivals and events. This document is not meant to be all-encompassing in details, but is intended to be a basic starting point for your consideration in putting on a brewers guild event that elevates craft beer in your state, shines positive light on your guild's brand, and promotes the guild's craft brewery member businesses.

## Get Organized

A good alphabetical list of file folders:

Advertising	Glasses	Press Conference	Taxes
Bands	Hotels	Press Releases	Tents
Bathrooms	Insurance	Production	Tickets
Breweries & Brands	Layout/Site Plan	Production Co.	Vendors (Food & Retail)
Brochure	Letterhead	Registration	VIP's
Budget	Letters	Security	Volunteers
Capacity Calculation	Logo	Signage	Website
Charity	Marketing	SLA	Will Call
Distributors	Media Plan	Social Media	Wrist Bands
Fact Sheet	Personnel (A-Team)	Sound & Stage	
Festival Overview	Poster	Staffing Co.	



## Pre-Event Venue Planning Logistics

- ✓ Secure venue and dates
- ✓ Public or private property?

From Jeff in WI; “We have found that having a municipal partner, in particular one with funds available for promotion has been a key to our success, and is the first thing we procure when starting a new festival.

I also believe the choice of venue is important. Something with a draw factor on its own is good.”

- ✓ Avoid other large established events and holidays
- ✓ Permits – special event/celebration/festival, fire permits for cooking demos, catering, etc. Guild nonprofit pulling permits, or brewery, or other?

Brian in Texas says “Your state’s Alcoholic Beverage Commission is the first step in the planning of a festival. Getting their buy-in is critical. I bring an experienced alcohol lawyer with me EVERY TIME, just in case.”

- ✓ Capacity of venue
- ✓ Security – Police/Paid Security/Volunteers
- ✓ Catering/Food options – on-site services only? Food trucks?
- ✓ Insurance - see below
- ✓ Bathrooms – are there enough? Porta Potties – multiple day event requires a refresh. Hand sanitizers. This portopottie site that helps calculate # of portopotties needed – <http://unitedsiteservices.com/uses-and-planning/special-events/planning-tool>

## Insurance Logistics

- ✓ Your guild board members should already be protected with Directors and Officers Insurance or "D&O". D&O policies vary greatly between companies. From David K in New York: “I believe the most comprehensive coverage is offered by Chubb Specialty Insurance (CSI). They offer a \$1,000,000 per occurrence and \$1,000,000 aggregate policy with a \$2,500 per claim deductible. Expect to pay around \$2,000 per year for this policy -- it's worth every cent.”
- ✓ If the space is at/near a brewpub, sometimes the in-effect liability insurance covers the festival as well as day-to-day operations.
- ✓ General liability and liquor liability (GL & LL) input from David K:
  - “Event Policies again vary depending on the company. There are a number of insurance companies that specialize in Event Policies. You may want to look into Philadelphia Insurance Company and K&K Insurance Group for a quote. They both offer solid coverage forms.”



- “I would recommend an annual policy whereby you can add events if needed. You will need "General Liability" and "Liquor Liability" coverage. The standard limit is \$1,000,000 and the policy allows you to have 3 additional insureds at no additional cost. There will be additional premium required for additional insured beyond 3.”
- “Try to limit the additional insured to property owners and municipalities.”
- “Those companies that you hire for services (ie: port-a-potties, etc.) should add your organization on their policy as an additional insured.”
- “I would also highly recommending obtaining certificates of insurance adding your organization as an additional insured from all food and non-beer vendors. Your GL & LL policy will cover the brewery participants so no need for anything from them.”
- “Other coverages that are important to festivals include:
  1. Damage to Rented Premises - standard limit is \$300,000
  2. Medical Expenses - standard limit is \$5,000 but you can negotiate a higher amount with some carriers
  3. Any Auto - this protect you from ANY vehicle involved in your event and
  4. Excess Liability or an Umbrella - I like to have \$5,000,000 in coverage when I do an event (\$1,000,000 policy + \$4,000,000 Umbrella). Plan on \$1,000 in premium for every \$1,000,000 in coverage.”
- “Costs - GL and LL policy depends on the number of attendees and the market (whether soft or hard). Right now the market is still a bit soft but there are rumors of it hardening soon. Plan on paying roughly \$1,500 for a 3,000 to 5,000 person event.”
- ✓ Additional insurance to cover weather?
  - Paul K in Nebraska: “Even though they are rain-or-shine events, there are things that don’t go so well in a torrential downpour / high winds etc. It isn’t very expensive considering it’s only against your base expenses (not any ticket reimbursements etc.) so in the scheme of things, it doesn’t hurt to have it.”
  - Eric B in Michigan: “We used to consider the use of “Rain Insurance” for our rain, snow, or shine Beer Festivals...but once we were fortunate enough to call our events “sell-outs” prior to the day-of, it wasn’t an issue anymore! I will say that bad weather in one of our first events could have KILLED our finances since we fund all Guild operations by our Festivals, so I wouldn’t rule out weather insurance as an option.”

## Beer Logistics

- ✓ To limit number of samples or offer unlimited pours? Some states cannot offer an unlimited number of samples for an entry fee, but can offer additional samples for sale on top of the samples that come with admission.
- ✓ Does state law require sample tokens/tickets?
- ✓ Sample sizes – how many ounces? How big is the glass?
- ✓ Buying the beer from members, members donating beer, check swaps – what’s the law?



- ✓ Host distributor where the beer can land and competition beers can be inventoried?
- ✓ Transportation and logistics of getting the beer to the event
- ✓ Managing laws regarding out of state breweries - temporary registration needed for beers not normally sold in the state?
- ✓ Important note: some states prohibit brewpubs from distributing their beer to events.

## Beer Calculations

Overestimate amount needed, but not by too much....don't want a lot of beer left over, but don't want to run out.

From the Brewers Association Events Committee, this is a guide and not a rule...

$$\# \text{ of minutes the event is open [round up]} \times \text{pour size} \times [\approx 2 \text{ to } 10] \text{ pours per minute}^* =$$

$$\# \text{ of ounces of beer each brewery should bring.}$$

\*The number of ounces being poured per minute varies depending on the event. At SAVOR, for instance, the idea is to have a conversation with the brewery owner or brewer pouring at the table and to sample the food pairing. So we estimate spending about 30 seconds with each person, or 2 pours per minute.

For example:

SAVOR is 4.5 hours = 270 minutes - round up to 300 minutes.

300 \* 2 ounces per pour \* 2 pours per minute for every minute of the event (spending a minimum 30 seconds with every person for 4.5 hours) = 1,200 ounces per session/12 ounces per bottle/24 bottles per case = 4.1 cases per session or draft equivalent.

128 ounces in a gallon

5.6 gallon keg = 716 ounces

15 gallon keg = 1,920 ounces

Breweries likely are not pouring every minute of the event, so the above allows for a bit of overage. If a brewery is drinking a lot of their own beer, this might be low so somewhere in the 4 - 6 case range is appropriate.

If a brewery knows that a beer is super popular and will be hit hard, send more...

For a more frenetic event, a brewery might be pouring 10 pours per minute (a pour every 6 seconds consistently for every minute of the festival).... In which case the amount of beer will be higher.

What type of event is it? Are you talking with the attendees about your beer?

A brewery ideally should not pour more than 20 pours per minute....less if the pour size is more than 2 ounces.



Doesn't really matter how many people are at the event... a brewery can only serve so much beer during the event hours. Of course taking into consideration how many other breweries are pouring and if the brewery is serving out of more than one side of a booth are all things to consider as well.

Another way of calculating beer quantities and more insights from Brian in Texas:

"For beer calculation, I use 32 to 40 oz per person. Multiply by the projected attendance (in my case, 5000) and you get ounces. I divide by 128 to get gallons and figure kegs from there."

"A Beer Captain is critical to make sure kegs are accounted for and no one is tapping a keg an hour before closing."

"I put a limit on the number of different beers they can bring, just to make it fair to everyone. **I ask for a max of four brands.** I also ask specifically for seasonal, one-offs and new releases (really important). And I do the rotating tap schedule, where we tap a firkin (usually) every 30 minutes at a different brewery's booth. This keeps it fresh and interesting though out the day (beer nerds are notorious for arriving early but I want to make it fun for the latter half of the day too)."

## Volunteer Management Logistics

Volunteers and vendors are your most important assets; treat them well.

- ✓ Recruitment
  - Recruitment of volunteers from already existing volunteer databases, sponsors, clearing houses, guild (enthusiast) membership, etc.
- ✓ Scheduling. Confirmation of volunteer days/shifts.
- ✓ Placement
  - Structure individual areas & staffing
  - Structure day of event staffing
- ✓ Training
  - Design volunteer handbook, emails, manual
  - Training prior to event
  - On-site training
  - Make sure all know where the bucket/mop is
- ✓ On-Site Supervision. Provide additional on-site volunteer coordinator for event days.
- ✓ Evaluation
  - Post-event survey
  - Debrief/conference with supervisor to eliminate disorderly volunteers for next year.
- ✓ Recognition
  - Shirts, hats, name tags, on site food and beverages, thank you gift, thank you note, recognition party, etc.



## Miscellaneous Logistics

- ✓ Festival glass orders – glass or plastic? Sample size? Include guild logo? To date stamp or not to date stamp?
- ✓ Ticket sales, printing, shipping – outlets? Paper or paperless? Bounce-back coupons for sponsorship?
- ✓ Brewer’s badges/credentials; unique each year; alphabetized & stored securely. Separate check in entrance.
- ✓ VIP hour? This is an excellent Enthusiast/ Allied Trade Member benefit!
- ✓ Sustainability issues → see more below.
- ✓ Commemorative merchandise orders for sale items → see more below.
- ✓ Competition logistics – this will be a whole different document altogether. Not included in this rendition.
- ✓ Music/bands, AV sound and lights.

From Brian in Texas: “MAKE CRAFT BEER THE FOCUS throughout. I hear so many planners worrying about bands and other similar 'accessories' that it makes me wonder why they don't just focus on the beer and brewers. I have bands but they all play for free (actually beer and food).”

- ✓ Walkie-talkies: a must if the event is in an area where you're unsure of cell coverage. Keep in mind when 3,000 attendees are tweeting about the beer they're drinking, the cell service can get pretty bogged down.
- ✓ Host hotel contracts
- ✓ Hotel reservations for staff, judges, VIPS and handling multiple changes
- ✓ Sponsorship sales and fulfillment
- ✓ Work with local public transit agency to give them a heads up on increased traffic and try to promote on train itself?
- ✓ Online presence:
  - Website: marketing information on tickets, special events, website updates, volunteer recruitment and information
  - Social Media – Facebook, Twitter, etc
  - Selling tickets online?
  - Age-gate the site!
- ✓ Print promotions – flyers, posters, coasters, postcards, community and daily newspapers (calendar listings and/or advertisements). Distribution of print products?
- ✓ Promotions on TV and radio – donating tickets to your local college radio station can earn you thousands of free advertising dollars! If you can get a station to advertise and promote your festival for a month in exchange for a booth at the fest, you will save marketing dollars and reach new audiences simultaneously.





- ✓ Brewers' Registration
  - Logistics/sign-up forms online and regulations guide in print form
  - Determining the categories/tiers for booths/registration
  - Clear communication to brewers as to what is required of them. Also how many pourers are permitted? (No you don't need passes for 30 folks to pour two styles!)
- ✓ Brewers' dinner the night before? An excellent opportunity for Allied Trade/Associate membership sponsorship dollars! Read more on our [Guilds Dues & Membership](#) page.

## Merchandise Logistics

- ✓ Staffing/cash registers/set up/bags?
- ✓ T-shirts for volunteers & staff?
- ✓ From Jerry G in Arizona: "Our guild has done t-shirts and hats for several years. We have them on our website (usually) but don't sell that many. We might sell 70 or 80 shirts and a few hats at our beer festival with attendance in the 3000 to 4000 range. We don't worry too much about left over stock as we use it for promotions, and we usually cover costs with the sales at the festivals. We pretty much just look at it as marketing rather than a profit center."
- ✓ From Chris G in New Mexico: "I personally do not like to put dates on anything, ever... glasses, t-shirts, etc... I feel it makes things difficult to unload. I would also agree that you take baby-steps and be sure you test the waters with smaller orders. Any of the national t-shirt companies will send you a sample of any shirt, blank of course, but if you have a question about a shirt they will ship you a sample free of charge."
- ✓ Also from Chris G: "I have dabbled with another idea for your festivals that you may want to explore. We have had live screen-printing at our events in the past, where the t-shirt is made right there on site. It becomes an attraction, as people like to see how things are made, and it means we don't need to order a ton of shirts and pray they all sell. This just-in-time solution can be a fun addition to your even, if you can find the right partner."
- ✓ From Laura M in Minnesota: "Instead of us doing a merchandise sales booth at our 3 beer fests – we have a retail group that now comes in with their nicely designed booth and all sorts of merch - they staff it and deal with everything including leftovers - and we get a small percent of sales for doing nothing but putting up a tent and some tables for them."
- ✓ From Eric B in Michigan: "We sell a fair amount of Guild branded merchandise in Michigan but it does not have the strong appeal that brewery logo merchandise has. Because of that we are fairly cautious about what we produce. It doesn't take much dead inventory sitting in your garage to make you wonder what the heck happened."

We offer merch at our festivals that is festival specific (limited quantities of t-shirts and hats) as well as stock items from our web store like water bottles, hats, sweatshirts, bottle openers, stickers and such. The stock items are not festival specific and we carry those in inventory for the web store.

We do our best to sell out of the festival specific items fairly early in the day during the festival but sometimes end up with t-shirts left over. We have sold these in the past at the next years' festival at a discounted rate and we found people would actually wait until the next year in hopes of getting the shirt at the low price and that would tend to impact sales



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of the current years' shirt (bad spiral to start). Now we use any leftover merch from festivals to give away promotionally or sometimes we will sell a leftover shirt at the next years' festival for \$5 or \$10 with the purchase of the current shirt.”

## Onsite Logistics

- ✓ Kegs and/or Bottles – jockey boxes, bus tubs
- ✓ Dump buckets
- ✓ Tapping equipment maintenance and upgrades
- ✓ Drinking water stations
- ✓ Set up and the dreaded tear down
- ✓ Signage/decorator
- ✓ Entrance gauntlet/line formation and plan to keep it safe
- ✓ Logistics of entrance to the festival for ticket holders and brewers/media/others with badges
- ✓ ID check – volunteer/off duty police on site?
- ✓ Working with the decorator to get the signage hung and the booths set up
- ✓ Pitcher rental – we rent all the available pitchers in Denver for the GABF festival – about 3,000 plus we have an inventory of our own
- ✓ Setting up a media room with internet access
- ✓ Catering details – food on site helps to promote more responsible drinking. Make sure the food vendors are experienced with big festivals and bring enough servings. Food trucks? Are they legal?
- ✓ Security logistics/planning (we have 3 levels – guest service volunteers + a paid security company + Denver police, all overseen by our Security Director)
- ✓ Depending on the size and nature of the festival, you may want to consider hiring an EMT or having a First Aid tent, table, or area.
- ✓ Procedures in place for dealing with over-served folks

## Ice. And More ICE!

- ✓ And back up ice on call.
- ✓ Consideration must be made for indoors vs outdoors/ winter vs summer, etc...
- ✓ Ice stats – we used 272,000 lbs (136 tons) of ice in 2012 at GABF. With 2774 beers on the floor, that's an average of about 100 lbs of ice per each beer over 3 days (4 sessions). We keep the kegs in ice/melted water overnight, then drain the tubs and re-ice at the beginning of each session.
- ✓ Ice math: GABF ice amounts average out to about 25 lbs of ice per beer/per four hour session.



- ✓ Since we have a mix of kegs and bottles, it varies – bottled beers don't usually need as much ice in the bus tub as kegs need PLUS the beers all come off refrigerated trailers, so they are cold to start.
- ✓ You could estimate 30 – 50 lbs of ice per beer for each 4 hour session.

...Brewers never have enough ice...

## Sustainability Initiatives

The Michigan Brewers Guild takes a Zero Waste approach to planning their festivals. They consider every single thing that will be brought to the event, with a focus on eliminating anything that will eventually become garbage.

From Scott Graham, Guild Director: “The bulk of all festival waste is composted and reused locally. The key to success is working with local partners and volunteers to sort waste properly and to follow up with removal and disposal. Multiple recycle stations are placed throughout the festivals with clearly marked bins so everyone can contribute to effective sorting.”

At the Brewers Association, we work with Zero Hero and the Denver Convention Center to make sure compost and recyclables are being handled properly.

- ✓ We utilize a volunteer green team and a point person to oversee that the stream is kept clean
- ✓ For GABF, we work closely with Zero Hero and look to them to help us achieve our goal to produce a more sustainable event - <http://www.zeroheroevents.com/>
- ✓ Other sustainability considerations: wind credits, corn-based cups, décor, program, reduce/eliminate unnecessary promotional materials, recycled paper, no plastic water bottles, compostable food utensils, bulk condiments vs. mini packets (phase out disposables), have food vendors use recyclable or compostable items... etc...
- ✓ We offer 5 gallon water dispensers at multiple locations instead of plastic water bottles. It's vital to keep the attendees hydrated.
- ✓ There are some great resources and standards now for sustainable meetings:  
<http://www.conventionindustry.org/APEX/APEXASTM.aspx>

## Responsible Sampling

Have a Responsible Sampling policy and promote that.

- ✓ Consider placing some sort of [Savor the Flavor Responsibly](#) type stickers on every pouring table (facing the people pouring the beer) to remind pourers to stick with the designated pour amount or just to remind to sample responsibly.
- ✓ Promote a DD program.
- ✓ Consider partnering with a cab company to provide rides to those who should not be driving. Spending a few hundred dollars on cab vouchers might be money well spent.



## Post-Event Logistics

- ✓ Reviewing final bills for accuracy
- ✓ File all proper tax paperwork post-festival
- ✓ Thank yous
- ✓ Post event list of to dos for next year.

## Considerations for next time:

1. How do you measure the success of the event? Making money - especially in the 1st year - ought to be just one of many quantifiable measures for success.
  - ✓ Some guilds survey for ROI by formally surveying attendees with a few brief yes/no questions (anywhere along the engagement process - when buying tickets, when entering, during the event, post event, etc) about if they came from afar and stayed in a hotel, ate at a restaurant while in town, used public transportation, and/or otherwise utilized the city in ANY other way OTHER than just attending the brewfest.
  - ✓ Was the vibe at the festival a good one?
  - ✓ Ticket sales (did you sell out?)
  - ✓ Was the venue happy with the outcome?
  - ✓ Was the venue or some other nonprofit the recipient of some level of proceeds?)
  - ✓ How much publicity (earned and otherwise) was garnered? Were media and social media hits positive?
  - ✓ Did local businesses purchase ads for the program?
  - ✓ Was merchandise (promoting a local product!) sold?
  - ✓ Something near and dear to everyone's heart... were there enough portapotties?!
  - ✓ Was the event within budget?
  - ✓ Did the event shine a positive light, within the community, on beer and craft breweries?
  - ✓ Hopefully you can say there were few to no cited infractions... that's always a success!
2. If you were to be able to remove one element from the festival to make your life easier what would it be?
3. How can you make the festival more environmentally friendly?
4. Who are you most thankful for in regards to the event?
5. What do you enjoy or look forward to the most about the festival?
6. What is the thing that you wish the attendees knew or understood better?



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Special thanks to the BA Events Team and guild leaders nationwide for their contributions to this document.

If you have festival/event insights, and would like to make an addition to this guild resource, please send [Acacia](#) an email. Thank you in advance for any input you share!

[www.brewersassociation.org/guild/funding-a-guild/](http://www.brewersassociation.org/guild/funding-a-guild/)