Event Planning for Geeks

John Labovitz

Who are we?

- Audrey Eschright
- Christie Koehler
- Sherri Montgomery

We organize…

- Conferences (Open Source Bridge)
- Unconferences (BarCamp Portland, WhereCampPDX)
- Open source code sprints
- Workshops
- Ignite
- Potlucks and socials
- and more!

We want to teach you...

How to get started planning your own event, in your own community, and where to find resources for learning more.

Reid Beels

What kind of event do you want to have?

- Conference
- Unconference
- Code Sprint
- Hackathon
- Workshop

Assemble and organize your team

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Find a venue for your event

Ankur Naik

Raise money

Possible sources of income:

- Contributions from individuals
    - put a contribute link on your website
    - allow people to contribute during registration
    - be transparent about your expenses
- Contributions from companies
    - ask your community for contacts
    - focus on supporting the community
    - be creative about your offerings: logo placement, job listings, mentions in email newsletters, recognition during event, videos, etc.
    - don't let the sponsors boss you around
- Registration fees
    - free events are great—cost is not a barrier to attending
    - but some events really ought to have a registration fee
- Grants

Pay for things

Option 1: Have contributors pay vendors directly:

- Pros: Requires no setup. Sponsors know exactly what their money is going towards.
- Cons: can be logistically difficult. Hard to pool smaller contributions to pay for expensive things.

Pay for things

Option 2: Have contributors pay individuals on your planning team directly and then have those people pay for things.

- Pros: Requires no setup.
- Cons: Can be difficult to track and is easy to abuse.

Pay for things

Option 3: Use an existing organization for fiscal sponsorship.

- Pros: Possible increase in contributions from 501c(x) status, ability to leverage existing organizational experience, an entity to write checks to and from.
- Cons: A financial overhead of 15-20% is not unusual, possible lack of control, poor execution if the fiscal sponsor is inexperienced or unqualified.

Pay for things

Option 4: Start your own company or non-profit.

- Pros: Control, transparency of process. Setting up a company is easier.
- Cons: It's a lot of work and responsibility. And it takes time.

Pay for things

Some other caveats:

Don't represent yourself as being able to take tax-deductible donations if you are not eligible according to the IRS. Make sure you sign up for a regular business account with PayPal and Google Checkout, etc., and avoid using the words "donation" or "donate" on your website and other materials.

Recruit and manage your volunteers

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Set the event format and schedule

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Solicit talks or session ideas

- Simple options: unconferences and hackathons often gather ideas on a wiki page or a mailing list
- Many conferences use some kind of software to manage this process
- We wrote an open source conference proposals and scheduling system called OpenConferenceWare that can handle everything from single-evening Ignite events to full multi-day conferences

Make sure the right people will show up

This can be done for free or cheap

- Write a reusable announcement
- Cross-post everywhere
- Get the whole team involved
- Ask for help from willing partners— relevant bloggers, user group leaders, mailing list moderators
- Postcards, flyers, and stickers are nice if you have funds

Aaron Hockley

Register the attendees (ticket sales and more)

- Depending on the size of your event, anything from a simple webform to an online service like Eventbrite can work
- If you sell tickets, you'll need decide how to handle payments
- Plan for on-site volunteers to check people in and hand out badges/nametags
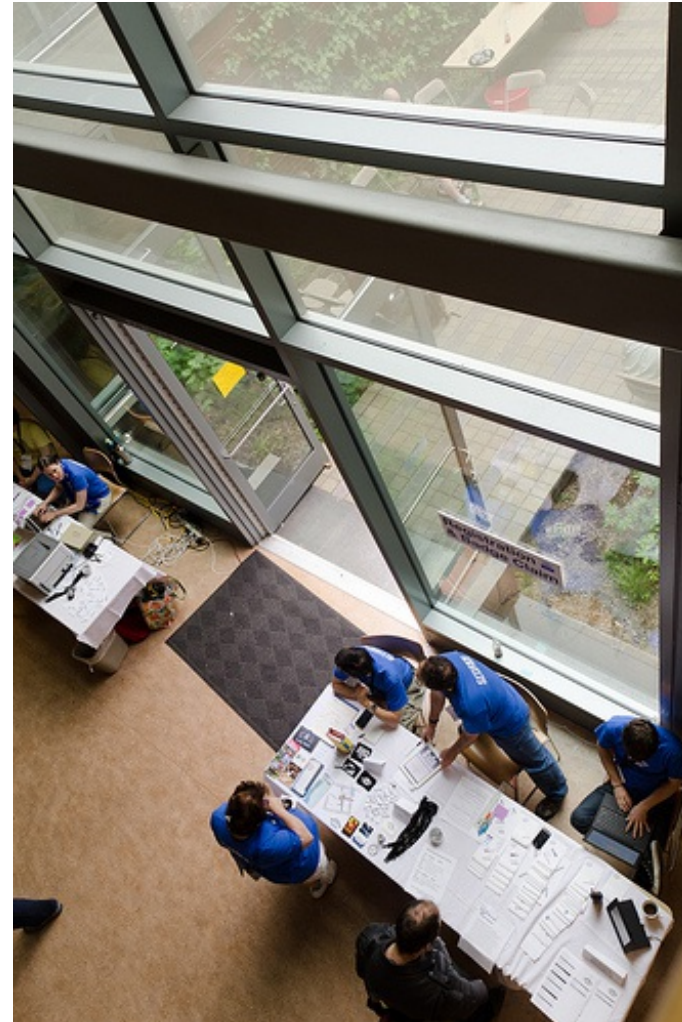
Get insurance (when you need it), deal with liability, and respond when things go wrong

Audrey Eschright

Design and purchase event materials

- Stickers, pins, t-shirts, scarves
- Event supplies: paper, pens, signage

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Communicate with attendees

- Your site: set up a blog
- Twitter and other social media
- Emails: just don't send too many

Paul Fenwick

Arrange for wifi, food, A/V, power, and more

- Your venue may provide these
- Or you could need to contract with outside vendors
    - Consider your budget and the needs of your participants
    - Make sure the vendor is familiar with the space (schedule walkthroughs)
    - Document contact info
    - Get it all in writing

Manage the on-site venue logistics fun

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Keep it safe, fun, and welcoming: codes of conduct, after parties, and considerations for serving alcohol

Unfortunately, the default in open source is not for events to be open, welcoming and safe for everyone.

If you want your event to be different from that status quo, you'll need to actively work to make it different. Here are some tips for doing so:

- Adopt a code of conduct: see http://citizencodeofconduct.org
- Be mindful when/how you provide alcohol
- Be available for feedback
- Be responsive to incidents
- Recognize positive behavior along with the negative
- Be radically inclusive: food, t-shirts and environment matter

Continue on

Keep the momentum once your first event is over

- Gather feedback from attendees
- Make sure you can contact everyone: collect email addresses, set up a mailing list
- Schedule a retrospective for your team
- It's never too early to start planning the next event

Find out more

We started an event planning handbook at

http://stumptownsyndicate.org/wiki

Questions?

Reid Beels

Thank you!

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