

# **POST MORTEM**

**2022 Fall Festival**

**Prepared for: The Hunt Club Community Association Board of  
Directors**

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Contents

- Introduction ..... 3
- Key Dates ..... 4
- Project Launch..... 5
  - Raison D’Etre..... 5
  - Blueprint ..... 5
  - The Vision..... 5
  - The Cutting Room Floor ..... 6
  - Key Performance Indicators..... 7
- Documentation ..... 8
- Analysis ..... 9
  - Fundraising/Sponsorship ..... 9
  - It Takes Two to Tango, Partner ..... 9
  - Who Manages the Managers? ..... 10
  - Now to the Main Event..... 11
  - Food For Thought ..... 11
  - Conclusion..... 12
- Recommendations ..... 13

## Introduction

This Post Mortem was written with the intention of reviewing the Hunt Club Community Association's 2022 Fall Festival. The purpose is to highlight for future Fall Festival Teams what 2022 organizers believe went well and also where improvements could be made.

It is acknowledged that there were conflicts between members of the Fall Festival Team and the HCCA Board in organizing the 2022 event. The specifics of those conflicts are not reflected in this report, as the details are not relevant to examining the Fall Festival, its successes, and its shortcomings for future organizers. Further, many of the recommendations here within should alleviate those issues by creating clear lines of communication, defining project planning/timelines, and identifying roles and responsibilities.

This document was authored by Matt Page. Contributions were provided by Fall Festival Team members, John Sankey and Peter Foulger. Lynette Joseph-Sankey was the Project Lead for the Fall Festival 2022 and, while provided a copy of the Post Mortem, has decided to neither support nor dissent the contents outlined here within.

Thank you for taking the time to read and consider.

## Key Dates

Held September 17, 2022 from 11am – 4pm @ the Hunt Club – Riverside Park Community Centre

- Fall Festival Team was formed, comprised of Lynette Joseph-Sankey and Matt Page, in December 2021 w/ the blessing of the HCCA
- Fall Festival Partner Meetings
  - March 2022
    - Attending Representatives: HCCA, RPCA, SEOCHC, City of Ottawa, Councillor Brockington's Office
  - May 2022
    - Attending Representative: HCCA, SEOCHC, City of Ottawa, Councillor Brockington's Office
- Fall Festival Updates to HCCA Board made at monthly meetings (Jan – May)
- Fall Festival Team confirms festival logistics
  - Location
  - Tents/Stage/Sound Rentals
  - Vendors/Participants/Volunteers/Dignitaries
  - Seek Funding from Community
  - Advertising/Marketing
- Emergency Fall Festival / HCCA Board Meeting in August 2022
- Fall Festival on September 17, 2022
- Volunteer Thank You Lunch on September 24, 2022
- Close Out meeting, wrapping of expenses, and Board e-vote in October 2022
- Post Mortem in November 2022

## Project Launch

### Raison D’Etre

After two years of a pandemic, closures, restrictions, and separation from family, friends, and neighbours, the departing HCCA Board impressed upon the new HCCA Board the importance of reinstating the Fall Festival, if possible.

The new Board, while significantly smaller than its predecessor, felt up to the task, and began work in earnest on the 2022 iteration of the Fall Festival in December 2021. Two members, later bolstered by a third, volunteered to undertake the challenge with the blessing of the HCCA.

The reason: Celebrate Our Community

### Blueprint

Prior to designing and planning the 2022 Fall Festival, the Fall Festival Team (FFT) obtained a binder, outlining the previous iteration(s) of the Fall Festival, from its prior organizers. This previous festival outlined in the binder provided was exceptionally well organized and funded by a \$9,000 grant from the City of Ottawa. It acted as the starting point for the FFT’s planning.

The FFT, wanting to revive the Fall Festival, set itself about organizing a Festival that would surpass that of its predecessors. With no grant available to it, the FFT instead set itself to meeting the funding requirements through other strategies:

- Form strong partnerships with peer groups and likeminded organizations; and
- Seek fundraising/sponsorship from community members, local leaders, and local businesses.

Based on the information provided by the previous organizers, the fundraising goal of \$9000 was targeted by the FFT. With this goal in mind, the FFT began designing the foundation for the Fall Festival that would inspire supporters, volunteers, and sponsors.

The Blueprint:

- Make the Fall Festival inclusive and representative, as best as possible, for ALL members of the community;
- Make the Fall Festival free and accessible, as best a possible, for ALL members of the community;
- Make the Fall Festival fun, as best a possible, with activities/events/attractions exciting for all members of the community;
- Make the Fall Festival a way to Celebrate Our Community, by featuring local artists, vendors, musicians, etc.; and
- Make sure the Fall Festival can run rain or shine on the scheduled date.

With these guidelines, the FFT was confident that it could design, plan, organize, and execute a fully-funded, fully volunteer staffed, and well attended Fall Festival.

### The Vision

Early in the planning phase, the FFT engaged with the RPCA, the Community Centre staff, the South-East Ottawa Community Health Centre, and Councillor Brockington’s office with the aim of forging strong

bonds and sharing the organization workload. Our goal was to divide and conquer the tasks and to generate more interest in attendance, volunteering, and sponsorship. A number of exciting and fruitful conversations lead to some great ideas in this initial planning stage. Unfortunately, the RPCA support dwindled, the SEOCHC was unable to provide any funding, and Councillor Brockington's office involvement was necessarily limited due to the election blackout.

Nonetheless, the FFT forged ahead.

As planning continued, the FFT was determined to invite high-quality, inclusive, and representative artists/vendors/organizations to attend the Fall Festival. In order to attract these vendors to the festival, which would run rain or shine, it was determined that providing tents for each station would allow us to attract the very best. Further, members of the FFT, on nearly a weekly basis, spent innumerable hours travelling to and attending local fairs and festivals across the city to seek out and invite artists/vendors/organizations; having a tented stall was a major attraction for many of these artists/vendors/organizations. Additionally, the musicians that performed were delighted by the stage and its size, setting them above the crowd.

For the community kids and youth, there were a vast array of ideas (from bouncy castles to petting zoos, sporting events to arts and crafts), with the FFT settling on face painting, free cookies, cotton candy, an ice cream truck, fire truck, and basketball with the Carleton Ravens.

To give the festival an air of importance, the FFT invited local dignitaries, which included the Mayor, MP, MPP, and City Councillor to attend.

Lastly, the aim was to execute the festival a zero cost to the HCCA and have the entire event funded through sponsors.

### The Cutting Room Floor

Before moving on to the Key Performance Indicators, here is a quick list of items that were discussed in the planning phase that did not, for one reason or another, make it into the final plan but that could be useful for future planners:

- Dignitaries:
  - Highlight/celebrate local "unsung heroes";
  - Invite local sports teams/celebrities to promote/sign autographs/speak;
- Kids
  - Bouncy Castle
  - Petting Zoo
  - Reading Corner
  - Magician
  - Monkey Rock (Riverside Park music company)
  - Crafts or Painting w/ local artists
- Food
  - Cultural features

## Key Performance Indicators

To understand if the Fall Festival was objectively a success, the FFT would look at the following indicators:

- Did we raise enough money to cover the costs of the event? Did we leave a surplus?
- Did we form strong partnerships to share the workload and encourage community involvement?
- Did we have enough volunteers to properly staff and run the Fall Festival?
- Was the Fall Festival well attended and was the feedback from participants, volunteers, and attendees positive?
- Was the Fall Festival a positive event for the community?

The analysis of these KPIs will be discussed in detail in the *Analysis* section of this document.

## Documentation

Documentation has not been included in this document for the sake of brevity and the fact that much of it is hardcopy.

Should anything specific be requested/required, the FFT will ensure to make it available to the HCCA.

Possible Documents to include:

- Fall Festival Flyer
- Sponsorship Package
- Communications Strategy/Content
- Budget



## Analysis

### Fundraising/Sponsorship

Before wading into this discussion, it should be noted that the fundraising efforts of the FFT are some of the most ambitious and successful efforts ever performed under the HCCA banner. At the end of the day, over \$7000 was raised, and over \$1000 was left as a surplus for the HCCA to fund future Fall Festivals. This is an undeniable success, and the efforts must be applauded.

Now, to the methodology.

The FFT was confident that it could raise the necessary funds to execute a festival of the size and scope outlined in *The Vision*. To do so, it would need to plan and fundraise in parallel, which meant that, at times, it had promised payments for which it did not yet have promised funding. It was a methodology that was most certainly not for the weak of heart, and could be seen as, arguably, too risky for a community association.

That said, the HCCA should not throw the baby out with the bath water. This methodology can be successful - it has been proven - but it needs more checks, better reporting, and strict timelines. Fundraising while planning, at least until a Fall Festival surplus is well established, will likely be a reality for the event for the near future.

So, how can we make it work? Briefly:

- Outline a reasonable but aggressive Budget/Fundraising goal for the project;
- Clearly indicate who CAN and CANNOT be reimbursed for the project;
- Outline what constitutes a sponsorship by which spending can be offset;
- Outline clear dates/gates for fundraising markers; and
- Track all Expenses/Sponsors in an accessible way to the Project Team and required HCCA Board Members.

Obviously, there is likely more involved in the fleshing out the methodology, but the above should give a good foundation for successfully using this strategy going forward.

Additionally, the HCCA should have a fundraising committee that is active year round to help fund these events, build partnerships with local businesses, jump on exciting opportunities with funding already available, and ensure that the HCCA is not with its hat out at the last minute, but is instead proactive in its fundraising activities.

### It Takes Two to Tango, Partner

Perhaps the most disappointing and rewarding part of the Fall Festival was the partnerships lost and won. The FFT from the HCCA has hoped to develop a strong relationship with the RPCA and, while the latter attended the first partner meeting, they did not attend the second one, and then stopped answering email altogether. Honestly, it is a mystery as to why they chose not to engage, as there did seem to be excitement in the first meeting. They need to be a strong ally, and there must be something about the relationship that requires repair.

It would certainly be a goal that the HCCA should undertake.

The initial response of the SEOCHC was also disappointing. The organization had previously funded less expensive versions of the Fall Festival, so when they indicated that they would not be able to offer any monetary support, it was a definite blow to the FFT, and the main impetus for the FFT's determination to fund the festival through its own fundraising efforts. While, in the end, no monetary contribution was made by the SEOCHC, they did help organize the distribution of COVID-19 test by Ottawa Public Health and their Youth Basketball Program's participation alongside the Carleton Ravens Men's basketball program.

Establishing a relationship with the Carleton Ravens was a major undertaking that proved to be hugely successful, and one that should be maintained.

The collaboration with the City of Ottawa and Community Centre staff was critical to the success of the Fall Festival. The team from the City and Community Centre were exceptionally helpful on the day of and leading up to the event and accommodating of the FFT needs in planning, setup and teardown of the event. The HCCA has a wonderful ally in the Community Centre staff.

Councillor Brockington's office was a wealth of information in helping the FFT reach out to members of the community for support, sponsorship, donations, materials, advertising, event planning, etc. Andrew Sutton is another key ally that the HCCA should value. As previously mentioned, Councillor Brockington's office was limited in its support due to the election blackout period, but the help they were able to provide was greatly rewarding.

Lastly, the HCCA itself was a steward of Fall Festival funds, but did not contribute any money towards the event (although it did offer a contingency fund). Many volunteers for the event came from the HCCA ranks, and their efforts on the day of the event should be recognized and celebrated, as their participation allowed for the realization of the FFT's vision for the Fall Festival.

Overall, the FFT did receive help, but mostly on the periphery of the planning, and it received zero help from partners with regards to funding/sponsorship. The FFT, in the beginning, expected that it would be a more collaborative exercise, and, as partners stepped down/back, the FFT resolved to manage the planning and funding of the event on its own.

### Who Manages the Managers?

Without a doubt, the biggest issue regarding the 2022 Fall Festival revolved around the projects management, reporting, and budgeting.

Upon receiving approval to commence planning, the FFT reporting on planning, budget, costs, fundraising/sponsorship, or schedule was limited. cursory updates were provided at monthly meetings, but little substance was provided as to the details or specifics.

In hindsight, the FFT could have been more proactive in disclosure and reporting to the HCCA Board. That said, the HCCA must also shoulder some of the responsibility in how events around the Fall Festival unfolded.

The people that make up the HCCA Board and its membership are people that come from all walks of life, with a pot-pourri of talents and experiences. The one thing they all share is a desire to do what they believe is best for their community. What "best for the community" means and how it is accomplished will not always be shared by all, and their approach will be shaped by those talents and experiences.

Project Management and Accounting are very particular skillsets that not everyone possesses, and the HCCA Board should not presume that everyone who undertakes a project in the HCCA will know how to properly document, report, and present in a timely manner. HCCA Board oversight is essential, but it is incumbent on the HCCA to provide the project teams with the templates, guidelines, and tools required to meet the Board's expectations, else you leave them to their own devices, and they may not have any to offer.

In this instance, limited data was offered by the FFT while oversight by the HCCA was not requested until four-weeks before the event. Both parties should accept their accountability, and having a clearly defined, HCCA approved Project Management model would have avoided this issue altogether.

As a strong suggestion, the HCCA should be acknowledging a Project Leader for each project who is permitted to make quick, timely decisions, as a committee/voting approach to all decisions is not realistic nor beneficial to projects at the size and scope of the Fall Festival. Once a project is approved, the HCCA Board's role should be limited to oversight, and the Board should not be involved in the day-to-day activities/decisions of the project team. With a designated Project Leader, defined project documentation, and clearly established reporting requirements, the HCCA should have all the oversight it requires while allowing the project team to enact and implement its vision unencumbered, as often quick, timely decisions need to be made without meeting or debate.

As a model, the Get Growing Program run by Barb Shea is a shining example from which the HCCA could develop its Project Management requirements. Others in the membership could likely offer insights, and it should become a primary focus of the HCCA to develop its model before moving forward with future projects.

### Now to the Main Event

While mostly anecdotal, the general consensus was that the 2022 Fall Festival event was a major success. It is estimated that 600-1000 people were in attendance throughout the day, the feedback delivered in person by attendees, volunteers, artists/vendors, dignitaries, and members of the HCCA (including the board) was vastly positive, and the FFT feels that it met all of its KPIs related to the event.

Of course, there are always ways to improve. A non-exhaustive list of suggestions for next year include:

- Moving the stage to make the music a more integral part of the festivities, as artists felt secluded from the majority of the festival goers;
- Improving scheduling/highlighting for different events/activities;
- Working volunteers in shifts; and
- Involving more local artists/musician/vendors/cuisine specific to Hunt Club.

Overall, the day of the Fall Festival was a success, and can be a model for future events.

### Food For Thought

On Sept 24, 2022, a lunch was held to thank the volunteers that participated in the Fall Festival. This list of volunteers included those that helped either before and during the event any unpaid musicians / artists that participated, and the FFT. In all, this list included 35-40 people. An email was sent out to nearly all volunteers two days prior to the lunch.

Only 16 of the 35-40 people eligible for the lunch attended, while food was purchased from a local eatery to accommodate maximum attendance. The cost for the volunteer lunch was roughly \$1000. For the record, it should be noted that there was more than enough money pledged from sponsors to cover this expense and still leave a surplus.

Considering the above, it is fair to say that the volunteer lunch, while thoughtful and beautifully run, was not an effective use of festival funds. This is not to say that a volunteer lunch was not good option for recognizing volunteer efforts, but that improvements its planning and execution could have ensured a better cost/benefit outcome. Namely, an accurate RSVP collected a week or two prior to the lunch would allow for a better estimate on costing and ensure that the budget reflected the attendance.

A suggestion that arose in some discussions post-festival was that the HCCA should hold a lunch to thank all of its volunteers for the year and not just the Fall Festival volunteers, as this would be more inclusive and respectful to all of those that lend their time to the Association.

### Conclusion

Let's again, please, acknowledge that the Fall Festival as an event was a success. It was attended by hundreds of people from all over the Hunt Club community, entertained young and old, highlighted our community and community association, and left the HCCA with a surplus going forward to next year.

A review of the matters around the Fall Festival clearly shows that there is room for improvement. The HCCA needs to provide its project teams clear schedules, requirements, and tools to guide them in providing the necessary and timely information needed for proper project oversight. Project teams need to be detailed and forthright in their information sharing. Partnerships need to be better cultivated and maintained so that projects are more collaborative and inclusive. Both the HCCA and Project Team members need to have a willingness to find faults and devise, share, and implement improvements.

There is a lot to be learned from this project, if everyone involved is willing to listen, learn, and respect everyone at the table. It is my hope that this document can act as a least a jumping off point for that learning and improvement to take place.

## Recommendations

This section aims to quickly provide the key takeaways from this document.

1. The HCCA needs to develop a Project Management model (equipped with requirements, templates, timelines, budgeting, etc.) to provide project teams;
2. The HCCA needs to establish Committees to handle event planning, communications, partnerships, sponsorship/funding, so that the day-to-day activities don't fall to the overall Board of Directors and to allow for more involvement from the membership;
3. The HCCA needs to examine ways to proactively increase its funding/sponsorship and partnerships with local businesses and like-minded organizations, thus setting the table for more collaborative project/events in the future; and
4. The HCCA should explore standardized ways to thank and recognize volunteers.