

Hosting an OpenStack Day Event

Suggested Activity Timeline and Recommendations

8-9 MONTHS IN ADVANCE:

- **Begin to Plan for your event**
 - Notify the OpenStack Foundation of your plans and intention to host an OpenStack Days event by sending an email to events@openstack.org
 - Identify your goals and objectives for hosting this event that would include the size of your event (# of attendees, # of sponsors, # of tracks and speaking sessions, etc.)
 - Name of your event: OpenStack Days XX=Location (e.g. OpenStack Days Sydney or OpenStack Days Australia) This name will be used on the website and in all outbound communications. Decide if you want your logo to be city or country specific: OpenStack Days Canada or OpenStack Days Montreal
 - Select a date or dates for your event. Your event can be one-day or two-days. It can include various tracks, upstream training, sponsor exhibit area, VIP event, happy hour, etc. If this is your first event, we recommend you start with a one-day event
 - Begin to recruit members for your OpenStack Day Advisory Board or Steering Committee. This team should be at least 4 individuals from 4 different companies or organizations
 - Create a high-level list activities and owners
 - Maintain an action item and to-do list
- **Guidelines, ToolKit, and Support**
 - Be sure to review the OpenStack Days tool kit here: <https://www.openstack.org/community/events/openstackdays>
 - Once approved, the OpenStack Foundation will assign a person to support you and your event
 - Review the OpenStack Foundation event guidelines. Here is the link: <https://www.openstack.org/brand/event-policy/>
 - We also suggest that you look for a volunteer that has marketing and/or event expertise to help you organize your event. Some organizers have decided to hire an event coordinator for this purpose.
 - Your sponsors and advisory board must be open to any company - including the organizer company's competitors
- **Select and Reserve a Venue:**
 - Look for a venue where you can have a reception area for registrations, a room dedicated for keynote presentations and one break out room.
 - This way you can run 2 event tracks; use the break out room for demonstrations, trainings or workshops.

- You can also consider hosting the OpenStack Days event at a company's corporate campus as long as it does not prevent any of that company's competitors from sponsoring or speaking at the event or attending it.
- For first time events, we suggest you consider starting with a maximum of 200 attendees. For a second-year event you can look to have 300-500 attendees.
- **Official OpenStack Days Event Agreement form:**
 - We are asking all of our OSD event organizers to review, complete and sign the Official OpenStack Day Agreement. This agreement form will be sent to you once you have been assigned a person to support you and your event.
 - A minimum of three sponsor companies are required before any event promotion or planning can begin. We would expect that you would have a minimum of four sponsoring companies for the event overall. Once you have confirmed these sponsors, then you can complete the OSD Agreement form and submit it to the OpenStack Foundation
 - The OpenStack Foundation will contribute \$5,000 USD to those OpenStack Day events that have met all of the requirements on the agreement form.

6-7 MONTHS IN ADVANCE:

- **Budget**
 - Prepare a preliminary budget (sponsorships, attendee fees, venue costs, hotel room blocks, catering, signage, graphics, promotion, etc.)
- **Define Roles and Responsibilities:**
 - Create an advisory team to help organize your event and to define roles and responsibilities
 - Be sure to invite your OpenStack Ambassador as a planning member of your event
 - Be sure to extend an invitation and include your local OpenStack User and MeetUp Groups
- **Keynote Speakers:**
 - Identify potential keynote speakers that will help attract both attendees and sponsors
 - Then determine the plan to reach out and get confirmations
- **Identify possible sponsors:**
 - Create a target list of possible sponsors to contact and determine how you plan to reach out to them
- **OpenStack Days logo and digital branding kit**
 - The Foundation will create a customized logo and a set of digital assets for your event. Once you have confirmed your date and location then notify your foundation staff person so your customized digital assets can be created
 - This kit will contain your OpenStack Day logo. We are happy to work with you to provide any additional graphics and signage. Just let your support person know

- **OpenStack Day Website**
 - Begin to work on creating the web page for the event. Your webpage must include the OpenStack Days logo, event date and location, about your event, sponsors, sponsor packages and how to sign up, sponsorship agreement form, list of speakers, advisory board, program schedule, registration page, event details, venue location and direction, etc.
 - Formstack (<https://www.formstack.com>) seems to be an easy application to use to create your webpage
 - Please be sure to send the link to your event website to your OpenStack Foundation support team for feedback, review, and approval
 - Once you have your website live, notify your support person so your event can be added to the OpenStack Days webpage on the OpenStack Foundation website

- **Attendee Registration Fee:**
 - Decide on the number of desired attendees, and if they will be paying a fee, if yes, what is the amount. The Foundation recommends that you charge less than \$100
 - You can also consider offering promotions, such as early bird pricing, special pricing for students, diversity promotion, etc.

- **Sponsorship Prospectus and Agreement:**
 - Begin to create your sponsorship prospectus that includes different sponsorship levels, costs and benefits. There could also be some in-kind sponsorship levels in addition to incidental sponsorships for lanyards, coffee, water, meals...etc.
 - This should also include your event date and venue location
 - Be sure to create a sponsorship agreement form that your sponsors are required sign to confirm their sponsorship

- **Recruit and Confirm Speakers:**
 - Work with your advisory team to create a list of targeted keynote speakers
 - Leverage your OpenStack Ambassador and local community and meetup groups
 - Leverage the OpenStack Speakers Bureau to recruit new speakers to your event.
 - Consider including 1-2 End Users as well.
 - Here is the link to the Foundations speakers bureau tool:
<https://www.openstack.org/community/speakers/>

- **StackerSwag**
 - For ideas please review the OpenStack Day tool kit on the OpenStack days website
 - Also feel free to contact your foundation representative for any other recommendations

- **Event Signage**
 - Determine any signage that will be needed for the event, for example: sponsor logo signage, welcome signage in the registration area, track signage, etc.

These graphics can be created by the Foundation if needed. We will create high-resolution graphic files so you can easily have them printed locally

- **Confirm Catering and costs with venue**
 - We have found that sometimes this may be the most expensive part of running an event
 - Some venues will offer a complimentary charge for a venue if you meet their food and beverage requirements
- **WIFI terms and conditions**
 - Confirm with the venue their WIFI access to ensure you have enough bandwidth to support all attendees at the event
 - Here's a helpful Bandwidth calculator:
http://www.psav.com/bandwidth_estimator/
 - All attendees will have high bandwidth requirements
- **Consider hiring a professional Photographer (optional)**
- **You may consider hiring a Videographer (optional)**
- **Be sure to confirm if there are any extra labor costs**
- **Be sure to send your invoices to Sponsors**

4-6 MONTHS IN ADVANCE:

- **Call for Presentations**
 - Prepare and distribute your Call for Presentations
 - Consider creating a theme for your event that will help to identify the specific content you are looking for
 - Begin to collect speaker bios, headshots, session abstracts
 - Consider recruiting Customer/End User speakers for your event
 - Work with your Foundation support person to help identify some names for you to contact
 - Begin to organize your Review Team that will evaluate each submission and to decide which submissions are selected. It is up to your team to create a fair and open review and selection process.
- **OSD Website**
 - Continue to **update your website** with new sponsors, keynote speakers and distinguished speakers.
- **OSD Agenda**
 - Begin to finalize and publish your agenda
 - Consider creating 1-2 main themes for your event
- **Walkthrough venue**
 - Determine needs for A/V, signage, projection, wireless network connection, etc.
- **Create template for name badges**
 - Suggestion: It is nice to include the sponsor logos on the name badges

- **Create event registration page**
 - We suggest you use Eventbrite to create your registration page.
 - Note: Eventbrite will not release the funds collected for your event until 5 days after the event.
 - So you will need to plan for this in your event budget
 - Be sure to add in the Foundation demographic questions to your registration page
 - Be sure to include the privacy policy on your registration page
 - Please consider adding events@openstack.org as an administrator

- **Event Promotion**
 - Identify the ways you would like to promote your event
 - Consider issuing a Press Release to promote your keynote speakers. Please note there is a Press Kit on the OpenStack Day Tool kit. And the Foundation needs to review and approve any OSD press release before it is distributed over the wire
 - The OpenStack Foundation will also help to promote your event via social media, email blasts to community list and digital advertisements
 - Contact local colleges and/or universities, offer special early bird discounts, promote via local OpenStack Meetup groups
 - Plan to leverage your vendors to help socialize the event via social media, announcements, etc.
 - There's an OpenStack Community Slack - where you can add your RSS feeds for your meetups and info about your events have private channels for attendees to chat etc. You can get an auto-invite here: <http://openstackcommunityinvites.herokuapp.com/>
 - There's also a Facebook group where you can let the community know about your events, CFPs, sponsorships and more: <https://www.facebook.com/groups/637144716425889/>
 - Brief sponsors regarding their booth details, benefits, promotion, what to provide in terms of materials and signage

- **Social Media**
 - Create a dedicated **twitter hash tag** for event and be sure to let your Foundation support person know.
 - The Foundation will use social media communications to help promote your event via tweets, digital Google Display ads, and Facebook ads and direct people back to your OSD webpage

2-4 MONTHS IN ADVANCE:

- Track registrations on Eventbrite, Meetup, and/or other registration page
- Determine who will be at the registration desk to check people in.
 - We suggest you have dedicated 2-3 people available to register attendees in the morning to ensure a quick registration process
- Giveaway items should be received and prepped for distribution.
 - Determine how and where you will hand giveaways – you will need at least 2

people dedicated to do this

- Brief speakers and send out master plan
- Continue promoting event via social media, MeetUp announcements, direct email, email to the OpenStack Community lists, LinkedIn ads, etc.
- Finalize arrangements with all vendors, including venue, catering, material suppliers
- Follow-up with Sponsors who haven't paid their invoice yet
- Decide if you would like to hand out surveys to attendees to get feedback, if yes, create a simple survey to get speaker effectiveness, overall event rating, comments what to include/do better next time, etc.

1-2 MONTHS IN ADVANCE:

- Finalize signage and printing requirements
- Track registrations to ensure you are on target
- Finalize any last minute sponsor requests – possibly add in the option to purchase a lead scanner for your sponsors
- Review your budget
- Work with sponsors regarding their speaking session – to ensure this is not a product/sales pitch but a presentation that speaks to the development of OpenStack Cloud Software

2-4 WEEKS BEFORE YOUR EVENT:

- Be sure to check with your Foundation representative to provide you with the latest version of the OpenStack Foundation slide deck that should be used during the welcome/registration and break time slots
- Confirm guest count with catering
- Suggestion: Print guest-list in alphabetical order by first name
- Print name badges in advance
- Suggestion to develop and print your onsite attendee survey in order to get feedback on the event, speakers, suggestions for next time, etc. Perhaps have them turn in their completed survey in order to pick up their OpenStack Day give swag
- Make sure all materials (agendas, event signage, collateral) are printed and ready

ON THE DAY OF YOUR EVENT:

- Set up clear directional signage throughout venue
- Check: A/V setup, lighting, wireless network, etc.
- Put up the floor plan for booths
- Set up video live stream (recommended but optional)
- Set up your registration table/area
- Brief volunteers and sponsors - help with set-up
- Brief your photographer and video person, if applicable
- Plan to post live tweets during event – include event hash tag and photos

POST EVENT:

- Retrieve photos from Photographer

- Send a few event photos to your foundation support person
- Post photos on Flickr & event website. Share with the post videos on the OpenStack Foundation YouTube channel: <https://www.youtube.com/user/OpenStackFoundation>
- Send the complete registration list to your Foundation support person
- Send in your responses to the demographic question to your Foundation support person
- Send thank you emails to speakers, sponsors and participants
- Collect all needed invoices and process for payment
- Determine planning for your next OpenStack Days event