



YOUR GUIDE TO CREATING A SUCCESSFUL

OpenStack Days

EVENT

OpenStack Days Guide

Are you planning to host an OpenStack Days event and wondering where to start? If so, this guide can help you get started and gain valuable insights from the OpenStack Days organisers who have gone before you!

Table of Contents

- Overview
- Where to Start
- Event-plan Strategy
- Organisational Management Process
- Event Branding
- Post-Plan Organisation
- Summary

Overview

So, you have ideas around organising your first OpenStack Days event but you have questions about:

- Where to start
- How to finance the event
- Exactly how much funding you really need
- Who will provide this funding, do you need sponsors
- When do you need the funding
- How will you find speakers
- Where should you host the event
- Pulling it all together

You say to yourself, “Gosh I have never done something like this before, I don’t know any speakers, I don’t have a marketing or events background, what if nobody turns up or even worse everyone turns up and my speakers don’t ... ” Right? Well rest assured, we have all had similar questions, fears and doubts, and now, having completed our first OpenStack Days event in our local countries, we are delighted that we have taken that first step – and believe us, you will be too!

This official OpenStack Foundation best practices guide booklet is not written to overwhelm you, the potential organiser, by providing you with copious amount of information on how to prepare the perfect OpenStack Days event. And even if this was our original goal, we would fail miserably, quite simply because there is no such thing as the PERFECT OpenStack Days event.

Each event brings with it its own local theme, culture, creativity and diversity. Yes, there are Foundation policies and guidelines and some standards you will need to follow, but this certainly does not, and should not, stop you from creating your own event with local personality, energy, and cultural influence.

So what does this guide booklet aim to provide?

- Quite simply, we want it to serve as a useful tool of best practices to help you get started
- To provide you with the specific guidelines, advice, and recommendations to help you manage the many tasks that you will need to complete before, during and after your event

- To help you create your own system to help you manage your OpenStack Day(s) to ensure it runs smoothly and is successful
- To share our experiences and some of the tools and resources we used, and where possible, to offer our recommendations for improvements you can make based on the experiences of our own events

It is worth mentioning that this guide booklet is NOT aimed at a marketing or Public Relations team who already have a lot of professional experience organising technical and educational events. This guide booklet is aimed at those of you who, like us, have limited or no experience with organising such events.

We hope this will encourage you to take the opportunity to organise your first OpenStack Days event in your region or country.

Where to Start?

First, get in touch with your local OpenStack user group and community ambassador to see if there are already events happening and how you can get plugged in. You can reference the list of user groups and ambassadors to find one near you.

(<https://groups.openstack.org/>)

OpenStack Days can require quite a bit of work to organize (one month before the event it can take more than 4 hours from your work day), so it's ideal for you to create a committee of people, that would include local user group leaders, to help you organize and collaborate across organizations, leverage existing local infrastructure, good topics to cover, local speakers and and potential sponsors.

Next, review the event [guidelines](#). OpenStack Days are non-commercial events and are expected to run in accordance with the spirit of the community. This means making reasonable efforts to open the events to anyone in the community who wants to help organize, attend, or sponsor, regardless of affiliation. It also means avoiding sales pitches and focusing on visionary, educational and user-driven content.

The OpenStack Foundation helps support OpenStack Days events with support resources, funding, speakers, content, and promotion. Once you have reviewed the guidelines, please contact events@openstack.org to get started.

OpenStack Foundation Event Policy and Guidelines

The OpenStack Foundation is here to support you as the organizer of your local OpenStack Days event. The Foundation has defined specific event policies and guidelines. This is an excellent place to start, so please read the Code of Conduct, OpenStack Privacy Policy page and the OpenStack Event Policy carefully before you begin. There are important guidelines around the use of the official OpenStack Days logo and branding. This is important to understand before you embark on your planning.

OpenStack Policy and Agreement Form

Official Guidelines located in the OpenStack Day Tool Kit

https://www.openstack.org/community/events/openstackdays#tab=host_tab

Code of Conduct

<https://www.openstack.org/legal/community-code-of-conduct/>

OpenStack Event Policy

<http://www.openstack.org/brand/event-policy/>

OpenStack Privacy Policy

<https://www.openstack.org/privacy/>

All this information is on the OpenStack Days webpages

https://www.openstack.org/community/events/openstackdays#tab=host_tab

Define Your Event Objectives

It is also a good idea to define your goals and objectives for your event. Examples of such objectives might be:

- Bring new members and individuals into the OpenStack community
- Support the open source and cloud community in your local region
- Raise interest in new technologies, and provide students with education on those technologies.
- Reach a specific vertical or target audience
- Create a local OpenStack MeetUp or End User group
- Collaborate with vendors on new technologies supported by the community
- Promote and attract potential customers who are interested in deploying open source solutions in their companies

By having goals and objectives, it helps keep you focused.

Assemble Your Team



As they say, no man is an island, and this is very true when organising an OpenStack Days event in your country or region. You will indeed get great support from the OpenStack Foundation in terms of guidance around what to consider, some advice around sponsorship, required marketing materials, access to some speakers via the Speakers Bureau tool (<https://www.openstack.org/community/speakers>), etc., but you will be the ultimate organiser of your event and you will certainly need a team of committed individuals to help you manage and execute on all aspects of the event.

We suggest that you develop an Advisory Board, which is a core team of volunteers. Be sure to include your OpenStack Ambassador and leaders of your local User Groups as part of your advisory board/team. We found that 5 to 8 people works well, but at certain times throughout the planning and executing stages, it is essential to have additional people to call on, for example, when assembling and distributing swag, when managing ticket entry, planning the schedule, recruiting speakers and sponsors, and operations on the day of the event. Be sure to include 1-2 people that have marketing and/or event experience, and also include someone with financial experience to help with your event budget.

Our advice is to get this advisory team in place as early as possible and begin to define roles and responsibilities for each member of this team.

Alternatively, you could decide to use an event management company. If you decide to choose to use an outside event management company, the OpenStack Foundation Events team would be happy to review the proposal and offer some suggestions and/or recommendations. However, this guide book only covers the recommendations when you choose to self-manage this part of the process.

Define your team's roles and responsibilities

OK so you have assembled your advisory team and you are ready to kick things off. It is recommended and a good practice to define roles and responsibilities for everyone on your team:

- Who will manage and oversee the budget
- Who will source your finance, including sponsors
- Who will manage the invoices and accounts payable process
- Who will oversee the CFP process and selection of presentations
- Who will source venues and liaise with the venue's management to organise the event setup, meals, rooms, payment, etc.

- Who will organise the design, printing, delivery and setup of your marketing material
- Who will organise sound and video on the day
- Who will define the program, final agenda, and select the speakers
- Who will organise and manage the website
- Who will secure the URL for the website
- Who will manage the social media process

As you can see from this initial and non-comprehensive list, there are many different things to organise that will require very different skillsets. Our advice is to take the time to do this planning upfront and to define what activities need to happen when, and who will be responsible for these. It will inevitably lead to a smoother road ahead.

Agree On Your Date

One of the first things you should undertake before you start your event planning and execution is to agree on a date or dates for your event with the OpenStack Foundation. This will ensure that your event is not happening at the same time as any other OpenStack events or key industry events. This is important because the OpenStack Foundation team may want to arrange travel itineraries around the different OpenStack Days events around the world and your agreed-upon date might influence these plans.

Securing a date early is also important when it comes to branding your event, which is covered in the next section. As the date is also a key component to getting your message out into the community, almost everything in your planning and delivery relies on having this finalized early in the process.

The optimal amount of time that you should give to planning your event is around 8 months prior to your event date. So, it is important to confirm with the OpenStack Foundation as soon as you decide that you want to plan an OpenStack Days event.

Another consideration is if you plan to have a 1 or a 2-day event, and what activities might take place on each day. For example, day 1 could be educational and perhaps the second day could be more technical, technical training / upstream training and technical presentations. We have more information later in this guide booklet around what activities you should undertake 8 months prior to the event.

Official OpenStack Policy and Guidelines Agreement form

After confirming your event date, you should request an official OpenStack Day Agreement form from the OpenStack Foundation. Please take into account you will need to have at least 3 sponsors committed to support your event before you can sign the official OpenStack Day Agreement Form.

Branding Your Event

There are a few areas you will need to consider in terms of branding your event, and one of these is around how you can achieve consistent branding across all your external touch points (e.g. website, social media sites, the event itself, promotional sites, swag, etc.)

Thankfully, the OpenStack Foundation helps out here by providing some images and logo templates for twitter, facebook, signage, pull-up banners, website, etc. which, of course, will make your job a lot of easier. After deciding on a date with the OpenStack Foundation, one of the next things to do is to request your logos and branding kit for your event from your OpenStack Foundation support person. This will provide you the branding foundation before you start working with a website designer and/or a graphic design house.

Other things you should consider early:

- Who will create your website
- Who will manage the design and printing of your marketing material
- Who will setup and manage your social media sites
- Note: if there is anybody in your company or on your team that can do these things, then you should consider whether you have the budget to outsource and also who on the team will coordinate all these activities.

Define an Estimated Budget

Although you won't know exactly what costs you will have at the early stage of your planning, it is good to define an estimated budget. This will help you define the strategy you will need to source the funds and will help you achieve a high-level plan around how many sponsors you will need to sponsor the event and at what cost levels.

Then you will need to pull together an appropriate Sponsorship Prospectus package to help cover your costs. Since this is an open community event, the OpenStack Foundation requires that you to offer sponsorship packages to any company, especially if they are located in the region/country of your event.

Event-plan Strategy

Organization and Process Consideration

Registration Tickets

Why should we sell tickets? One aspect is to help with budget but the other benefit is that you receive a stronger commitment from your registered attendees. Normally when you charge to attend an event, you can approximate about a 5-10 % no-show rate; however, with free events the show rate can be up to 50%.

The Foundation strongly recommends that the price for attendee tickets should be less than the local currency equivalent of \$100 USD. Your registration fee should be similar to other tickets at OpenStack Days events in other countries in your region. So, contact the other organizers or check their website to verify how much they are charging. You can also consider offering Early Bird tickets for attendees. Early Bird tickets allow you to offer a discount to those who register early and the offer of these tickets should be rescinded no later than one month before the event. Another idea could be to offer discounts for students and possibly 1-day tickets if you are hosting a 2-day event.

Tip: Promote the Early Birds tickets on social media and in emails to attract more people to buy tickets with the early discount.

The Eventbrite system is a really great tool for managing your OpenStack Days event. It is easy to use and has a lot of intuitive features for managing your ticket sales, attendee lists, refunds, reminder emails etc. There are two important things to note:

(1) If you have no experience with accounting and invoices, check everything with your accounting department. It is important that you are compliant with tax and accounting regulations in your country (such as exchange rate, due dates, company's ID and other mandatory requirements which must be included in invoices or tax documents).

(2) Make sure to ask for information about the attendee's - name, company, title, state, country, and email addresses. Please note that per the OpenStack Foundation privacy policies, the Foundation prohibits sharing the attendee information with sponsors, other event participants, and 3rd parties. Please be sure to reference the below policy statement and link on your registration page:

“Personal information gathered by the OpenStack Foundation is handled in accordance with the Foundation’s Privacy Policy and is used for internal purposes only. The OpenStack Privacy Policy is available at <http://www.openstack.org/privacy>.”

In order for the Foundation to capture demographics from all of the OpenStack Day events around the world - please be sure to include this question below as part of your registration requirements:

What is your current Organizational Role at your company?

- Business Development
- CEO, Executive Leadership
- CIO/CTO
- Cloud Application Developer
- Cloud Architect
- Engineering
- IT Manager
- Marketing/Events
- OpenStack User / Operator
- Operations / SysAdmin
- Product Strategy or Product Management
- Sales
- SysAdmin
- Upstream Developer
- Other, please specify

All of this information can be very useful when organising your registration desk and badges, e.g. you can organize by company and to understand the demographics of your audience.

You can also use Eventbrite also for issuing free tickets. The Eventbrite tool allows you to either issue a free ticket directly or to generate special codes which can then be sent to speakers or special guests. Another option to consider is if you want to offer discounts to students, minorities, women, etc.

You will need a secure place where you receive money from your ticket sales and/or sponsorship. We recommend you setup a PayPal account to manage your financial transactions for simplicity and security. PayPal accounts are also easily synchronized with the Eventbrite tool.

NOTE: Paypal does charge a transaction fee however, so be careful to factor this into your pricing strategy and overall budget.

Budget

There are many costs associated with running an OpenStack Days event and it is good to understand upfront what budget you will need. Some of the many costs include website, conference room fees, internet, catering, technical staff, marketing (swag), video production, etc. A budget list helps you control your spending and effectively manage your income and expenses. Take into consideration your financial limits when you start planning the conference and keep your budget updated each week to be able estimate how much money is available for presumed and/or additional expenses.

It is always good practice to factor in a contingency fund to the overall budget. Normally your income should be 10% higher than your planned costs. Unexpected expenses can and do occur and you will need to pay them. So if your calculated overall cost is 30,000, you should typically plan for 33,000 or more. Table 1 below shows a sample budget template and Table 2 shows an example of a budget.

Some tips below when preparing, securing and managing your budget:

- Plan on covering most of the expenses through sponsorships so that ticket prices can be kept to a minimum. Allocate some budget for scholarships / discounts (see below).
- Secure a couple of lead (“Headline”) sponsors that will give both you and the other sponsors confidence about the event. The OpenStack Foundation also requires you to have two lead sponsors before they sign up.
- Be prepared to pay some percentage of venue fees/advances as payments from most of the large sponsors could take more than 30/45 days to come through.
- Enabling some kind of online payment (like PayPal or Bill.com) is definitely worth it, even though you may need to pay surcharge fees. This allows sponsors to pay directly instead of going through a time consuming procurement process.
- Please consider providing discounts to underrepresented minorities (gender, race), the disabled, students and fellow OSD organizers. Check out our [Diversity Scholarships](#).

Table 1: Cost Budget Sample

Items	Price per Item	Amount	Unit	Discount	Total Price	Total
Conference hall 1						
Conference hall 2						
Other rooms						
Furniture						
Subtotal Rent						
Sounds & Lighting Production						
Technical staff						
Photos						
Videos						
Internet						
moderátor						
Eventbrite fee						
Subtotal other costs						
Beverages						
Food						
Hostesses						
Transport						
Subtotal catering						
Notes						
Pens						
Stickers						
Sunglasses						
T-shirts						
Banners						
Textile bags						
Badges						
Etc...						
Subtotal swag						
Total price						

Source: own example of cost budget

Sponsor type	Sponsors	Amount	Qty	Total income	Invoice issued	Due date	Billing date
Organizer		€1 000,00	1	€1 000,00	YES	29.5.2016	25.5.2016
General Partner	AAA Company	€1 000,00	1	€1 000,00	YES	28.5.2016	25.5.2016
Premium Partner	XX Company	€500,00	1	€500,00	YES	28.5.2016	20.5.2016
Premium Partner	YY Company	€500,00	1	€500,00	YES	30.5.2016	
Premium Partner	ZZ Company	€500,00	1	€500,00	YES	30.5.2016	
Partner	ABC Company	€100,00	1	€100,00	YES	15.5.2016	16.5.2016
Partner	CDE Company	€100,00	1	€100,00	YES	28.5.2016	28.5.2016
Partner	EFG Company	€100,00	1	€100,00	YES	15.5.2016	15.5.2016
Partner	GHI Company	€100,00	1	€100,00	YES	15.5.2016	
Partner	JKL Company	€100,00	1	€100,00			
Other	Ticket		120	€1 200,00			
Total Sum				€4 200,00			

Table 2: Income Budget

Source: own example of income budget

Identify and Establish Partnerships & Sponsors

When your budget plan is complete, next is to decide how many sponsors you will need and the different levels of sponsorships needed to fund your event. You could offer different levels of sponsorship, e.g. Gold, Platinum or Silver, or you could offer just one type of sponsorship package for all. It is up to you how you create your sponsorship package and what you want to offer in it. There may be interest from international companies to sponsor local OpenStack Day events, so you are not only bound to finding local sponsorships. Please note that due to the OpenStack Foundation's privacy policy, you can not offer the registration list as part of the sponsorship packages. It is up to each sponsor to gather leads from the OpenStack Days event.

There are several types of incentives, which can help attract your sponsors, including pre and post event activities, in addition to specific on-site promotions. Your targeted sponsors should be aware of all the promotional opportunities that your sponsorship package offers. This will increase the value of sponsorship packages and can attract more potential companies.

Some ideas to offer your targeted sponsors:

- Sponsor logos included in all marketing materials (website, email campaign, social media, advertising slides to be displayed on the screens inside the conference room, video from the event posted at official website)
- Headline designation that includes all sponsor logos at official swag (t-shirts, pens, attendee bags, etc.)
- Logo displayed on all event signage

- Booth space in the venue - if you are offering to have booths at your event
- Sponsor's swag and brochures included in welcome package
- Educational presentation on the main stage (not a sales pitch)
- Free tickets for Sponsor's Partners/Customers
- Invitation to pre or post event Networking Party or event to host a Networking event
- Media coverage and consider looking for Media partners as sponsors

Most organisers create powerpoint slides to capture the details of their sponsorship package(s). You should request some sample packages offered from previous organisers through the OpenStack Foundation or you can find some examples on the OpenStack.org OpenStack Days webpage. Click on the following link for more details:

https://www.openstack.org/community/events/openstackdays#tab=host_tab

You should also prepare a “Sponsor Application Agreement Form” which clearly defines the policies and requirements of the Sponsors as well as the Organizers. The document should consist of personal/company details, payment and invoicing terms, sponsorship details, a link to code of conduct / or event policy rules. The document should be signed by both the organiser and the sponsor and should be considered a legally binding document.

Website

Launching your OpenStack Day website.

Having a website is a great way to advertise details of your OpenStack Day to your target audience and to advertise who your sponsors are. The website should be in English even if your native language is not English. Our advice is to consider making the website bilingual to cater for all.

The website is really important. It is usually the first point of contact/reference for potential sponsors and possible attendees. A [user-friendly](#), well-organised web site will give the first impression of what your event will be like and you will have a better chance of converting your browsers into event attendees.

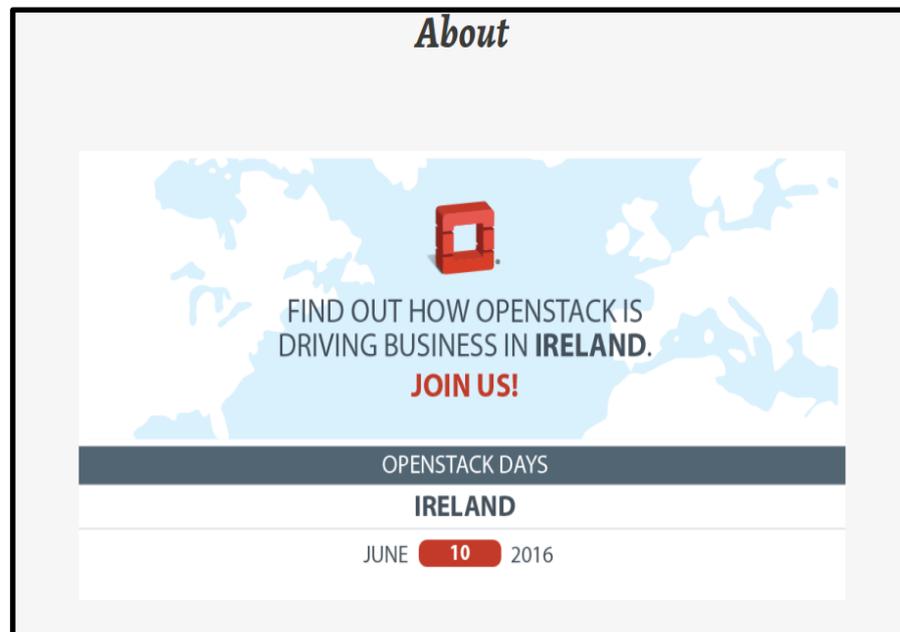
“Make the website user-friendly and intuitive”

One of the first things you need to do is register your domain name for your website. Please check with the OpenStack Foundation before you purchase this url to be sure it is consistent with the OpenStack Foundation policy and guidelines. In most cases, you will need to pay for the rights to use this URL, and it will need to be renewed each year. When choosing the

domain name, please consider something easy to remember and intuitive. You can look at other OpenStack Day websites for reference.

Below are a number of important things that should be included on your website to help and make it attractive and informative:

- What is an OpenStack Day event
- Details about the event: dates, location, hotel information, agenda, speakers, etc.
- Why the conference is being organized
- Information about the open source community
- The target audience
- Highlight your advisory committee members showing the community support and to ensure this is not seen as a vendor-specific event, but an OpenStack community event.



Source: <https://openstackdayireland.com/>

OpenStack Days Ireland, 10. Jun 2016, Dublin

We are delighted to announce the first ever official OpenStack Days Ireland event which will take place on the 10th June 2016 in [the Marker Hotel, Dublin, Ireland](#) on the 10th June 2016. OpenStack Days are conference-style events that typically happen once per year in a particular region and attract speakers locally and from all over the world.

This is a great opportunity to meet the OpenStack foundation chief executive, industry leaders, end users and active community contributors/core dev's and share learnings.

To secure your seat at the first OpenStack Days Ireland event, [click on the following link to register](#). Please note there is a cover charge of 55 EUR which includes your event pass, a sit down lunch in the fabulous Brasserie restaurant, The Marker Hotel, refreshments throughout the day, the first OpenStack Ireland Event T-Shirt and automatic entry to have a chance to win one of many fabulous spot prizes. Don't delay - book now as places are limited and you really don't want to miss out!

Source: <https://openstackdayireland.com/>

- Call for Presenters & Sponsors
 - 2 very important keys aspects of any good event: One is the quality of speakers and two are the sponsors which are reputable and recognised as leaders in the OpenStack community.
 - You are encouraged to find end-user speakers to tell their story about how and why they have implemented OpenStack, or contributors to OpenStack code, PTLs or other OpenStack user group leaders.
 - You should plan to announce your Call for Presentations at least 3 months in advance of your event. It is a good idea to decide on a theme for your event and to post this on the website and in the CFP announcement. This will ensure you have submissions that align with your theme.
 - Be sure you have a good and anonymous process in place for the review and selection from the submission to select the best possible speakers and topics for your event

- Recommendation of Hotels, Airbnb places
- Contact info for taxi services or Uber application, provide public transport information
- **Do not launch the website if you don't yet have a venue reserved**

Location



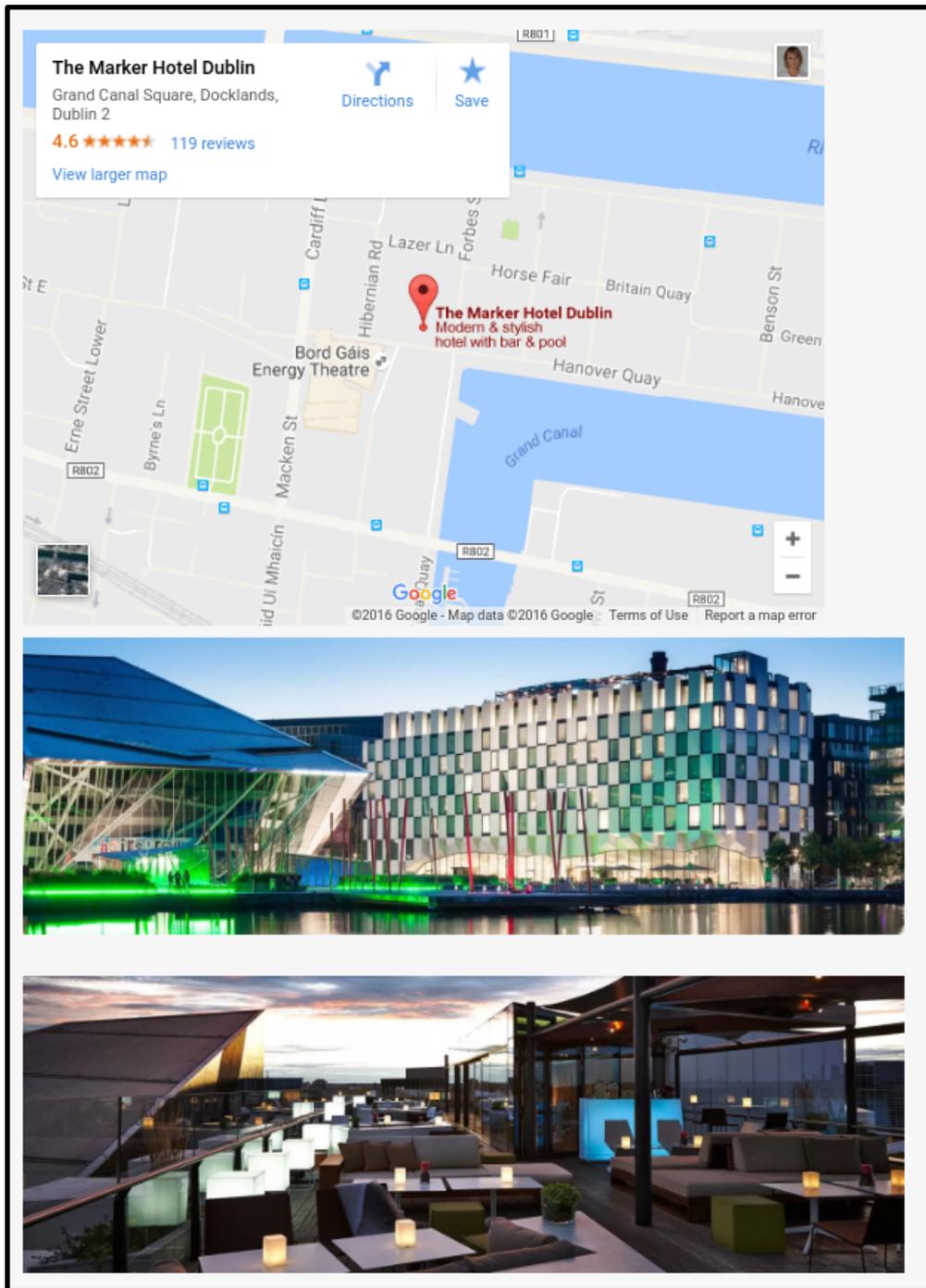
The Marker Hotel Dublin

Grand Canal Square, Docklands, Dublin 2

Calling all Open Stacker's - Join us in Dublin's newest, luxury design hotel, The Marker Hotel, in *the* heart of Dublin city's most vibrant new business and cultural quarter for the first EVER Open Stack Ireland Day - guaranteed to be a super event - don't miss out, places are limited and they are filling up FAST - register [here](#) to secure your spot!

Source: <https://openstackdayireland.com/>

- The location of the event and direction



- A detailed map of venue to provide more detailed information for your guests

- Link to the Ticket Purchase System
 - Use Eventbrite if you do not have any experience with another ticket system
www.eventbrite.com

OpenStack Day Ireland

Intel, Selected Green, Dell, Ammeon, Suse, Red Hat
Friday, 10 June 2016 from 08:00 to 17:30 (IST)
Docklands, Dublin

Ticket Information

TICKET TYPE	SALES END	PRICE	FEE	QUANTITY
Full access	Ended	€55.00	€0.00	Sold Out

Source: <https://openstackdayireland.com/>

- Speakers
 - Public photos, title and short bio of all speakers
- Sponsors
 - Split sponsors into category such as Platinum Sponsor, Gold Sponsor, Silver Sponsor, if required..
 - **Do not forget Media Sponsors**



THE NEW STACK

Source: <http://superuser.openstack.org/> Source: <http://thenewstack.io/>

- Schedule/Agenda
 - Schedule of presentations should be public when you have more than half the speaker slots filled. TIP: A really great tool for scheduling is SCHED. <https://sched.org/>

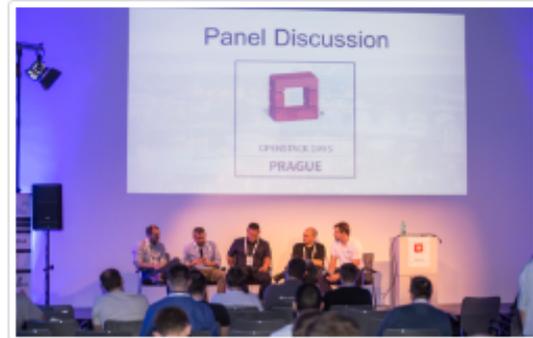
OPENSTACK DAY PRAGUE, 2016		
	About	Photos
	Videos	Location
	Schedule	Speakers
		Sponsors
<h2>Schedule</h2>		
Time	Track 1 (Auditorium)	Track 2 (Studio)
09:00 - 09:30	Registration + Coffee Break	
09:30 - 10:00	Keynote - Mark Collier (OpenStack Foundation), Adam Skotnický (tcp cloud)	
10:00 - 10:30	Bringing enterprise operations to OpenStack	
10:30 - 11:00	Build Private, Public and Hybrid Clouds with Contrail	
11:00 - 11:20	Coffee Break	
11:20 - 11:50	The Cloud Native Fallacy	
11:50 - 12:20	OpenStack built for your IT demands	
12:20 - 12:50	Application portability and effective orchestration across various platforms	
12:50 - 13:45	Lunch	
13:45 - 14:15	Contrail Networking	OpenStack On OpenStack: TripleO for scalable deployment and management
14:20 - 14:50	3 Years with OpenStack - Service Provider & Development	OpenStack in Kubernetes by OpenStack-Salt - Deep Dive
14:55 - 15:25	Using containers to create the World's fastest OpenStack	Mastering the OpenStack deployment
15:30 - 16:00	Best Practices for Load-Balancing-as-a-Service in OpenStack	Hardware pro OpenStack
16:05 - 16:35	OpenStack, a Paradigm Shift for a Load Balancing and Security DC Design	Digitalni transformace k automatizaci pomoci OpenStack
16:40 - 17:15	Panel Discussion - Jonathan Bryce, Adam Skotnický, Joseph Sandoval, Mark Baker, Marc Rapoport	
17:15 - 19:00	Networking Party	

Source: <http://openstackdayprague.eu/>

- After the event you will be asked by OpenStack Foundation support person to provide the following items
 - Your final registration list
 - The final number of attendees at the event
 - Any demographic and/or survey information collected
 - Any photos they can post on the OpenStack Days website
 - Any videos that can be posted to the OSD website
 - Videos for the OpenStack YouTube channel
 - Quotes from attendees that can be used on the website

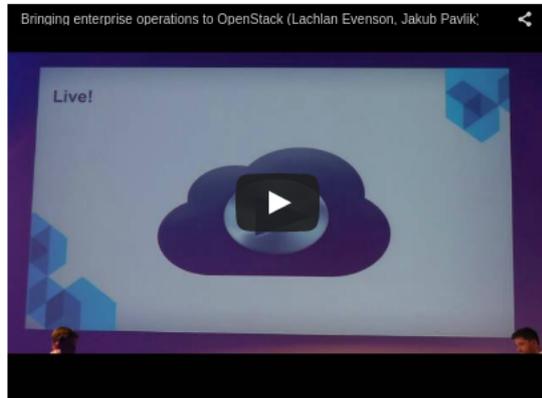
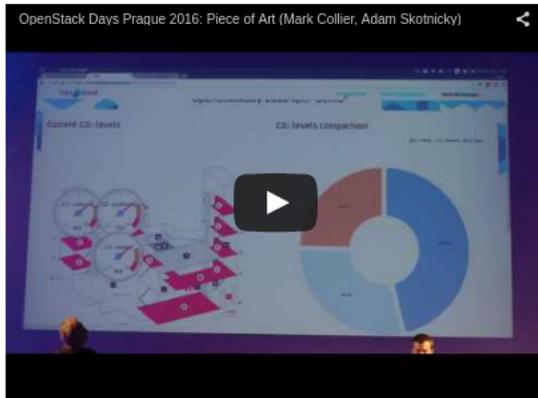
- Update your website with the event Videos of Presentations & Photos and any Quotes from attendees or sponsors
 - Record videos of presentations, upload them to your website and promote through social media. This is a great way to help attract people for your next OpenStack Day event. You can use a YouTube channel also or ask the OpenStack Foundation to upload the presentations and other videos to their official YouTube channel.

Photos



Source: <http://openstackdayprague.eu/>

Videos



[More videos](#)

Source: <http://openstackdayprague.eu/>

Please note: once you have created your website, please let your Foundation support person know so they can review the website and provide any suggestions before you publically launch it.

Organizational Management Process

The chapters above describe the process mainly from a financial and promotional point of view. Now let's focus on the individual activities that need to be complete in the months running up to the event. A GANTT Diagram is a useful way to help manage your schedule and keep track of minor tasks that you might otherwise forget.

“Use the technology around you as much as possible”

Activity at least 8 months before the event

When requesting a date from the OpenStack Foundation, there are a few considerations you should make:

- Check if there are any IT or other conferences in “your” region and choose the date which will not collide with these events
- Be informed about other OpenStack Days in your region
- Approve the date with OpenStack Foundation
- Register the date at openstack.org
- Consider creating a theme for your event

Before you start thinking about the venue you have to determine the size of event. The event size is determined according to the expected number of attendees. A small event includes 100 - 150 attendees; a medium/large event is described as an event with 150 - 500 attendees.

Now that you have the date and you know how big the event will be so you have to secure a venue. You should take your time selecting the right place for your OpenStack Days event.

3-5 months to go

There is not an exact time for when your website should be launched but the optimal time is usually 4 months before the conference. Launch the website with the following information:

- “About” the event
- Details about the venue
- Activate ticket system
- “Call for presentation” option
- Your lead sponsors
- Confirmed keynote presenters

- “Become a sponsor” option
- Be sure to consider adding Media partners as possible sponsors as well to help promote your event through their media channels. Once your website is up and running, it is a great time to ask companies to become your official sponsors of the upcoming OpenStack Days event. Securing sponsors can take some time so start early

The most important thing at OpenStack Days events is the quality of the presentations and speakers. The OpenStack Foundation can assist you with securing some speakers but you can also try to solicit speakers through your website via a contact form. The form for potential speakers should consist of:

- Proposed presentation title
- What is the general topic of the presentation (cloud security, compute, enterprise IT strategy, user stories, operation at OpenStack platform, etc.)
- Select the level of your presentation content (Beginner, Intermediate, Advanced)
- Presentation abstract
- Contact information (name, email, company)

Please do not forget to set up your website to ensure that all above mentioned points are mandatory to fill in. This information is crucial for the local OpenStack user group to select the best presentations. You should also promote the call for papers via social media and email.

Our recommendation is to prepare an automatic email response to everyone who submits a presentation with basic information about the deadline, decision period and date when they will be informed about the selection process results.

Four months before the event, you should also be looking at securing other vendors for your catering, sound & lighting production, videography etc.

It is important to trust your vendors.

“Before the OpenStack Days Prague I had no experience with catering companies. I have no idea what should I do first. So I asked the event manager of the venue for their recommendation on which catering company usually provides the food and beverage during the other events organized at this place. He recommended three companies. Then I checked the references asked for the price offer and chose the catering company that worked best for our OpenStack Day.”

If you decide to organize the event in a hotel then you do not have to outsource catering services. But please check the hotel to be sure the “cuisine” is to high standard in advance of booking.

All attendees most likely will have high network bandwidth requirements. Here's a helpful Bandwidth calculator: http://www.psav.com/bandwidth_estimator/ There are a few others out there if you'd like to compare/contrast. Please note that there might be an additional charge for WIFI.

1-3 months to go

Be sure to allow enough time to create and print all of your event signage. The OpenStack Foundation provides you with branding, including some signage templates that you can use. You will need signage at your event to highlight your sponsors, create some directional signage, signage for your main stage, etc.

You should start promoting your OpenStack Days event at least 3 months beforehand. Use Facebook, LinkedIn, Twitter, local community meet-ups, OpenStack community, OpenStack user groups, and other user groups in your location (for instance Kubernetes User Groups, Docker User Groups, etc.). Be sure to send 1-2 emails to your OpenStack User Groups' members as well as the marketing databases for your company with the event details. You can also provide your sponsors with a “promotion kit” that includes sample email messages, suggested tweets, important dates/milestones to remember, etc., along with guidance on event URLs, hashtags, etc.

This first promotion should attract attendees and should also try to make initial contact with potential sponsors, so make it exciting and professional from the onset. You should promote the event periodically after that. Promote interesting speakers, impressive presentations, share official logos or new swag. Promoting your event is fundamental in helping to make your event successful. The OpenStack Foundation will also support you in this effort with their own digital advertising on Facebook and LinkedIn, in addition to social media support via twitter.

Do not forget to choose and order your swag at this point. You can order you own or you can ask for swag from your sponsors, they are usually delighted with the opportunity to provide some branded swag items. For larger events, you can also include branding opportunities as sponsorship add-ons; e.g., badge lanyards, coffee cups and break stations can all be add-on sponsorships.

Please order more promotional items than the actual expected number of attendees. You should always assume unexpected attendees who might turn up on the day.



source: <http://openstackdayprague.eu/>

Please be careful with colors when printing - red is not always red :-). It is important to have the correct pantone palette to make the logo the same as the graphic template. Here are the official Pantone colors used by the OpenStack Foundation: 1797 (red) and 298 (blue).

Call for Presentations

Two months before the event is the best time for choosing the presentations of speakers who registered in "Call for Presentations". A committee that you have pulled together yourself should review all of the submissions. The committee should be an independent authority consisting of technical cloud engineers from your local user group (5 members is optimal). The committee has to define the process of approval. They have to take into consideration the following parameters when choosing a talk - technical level, topic of presentation, experience of speakers, etc. The rules have to be defined beforehand and should be approved by OpenStack Foundation. The committee should schedule the meeting and select the number of presentations. When the presentations are selected you should send the email to speakers to congratulate them and provide enough information to attend the event.

1 month to go...

Do not forget to:

1. Submit your invoice to the OpenStack Foundation for \$5,000 USD
2. Announce the end of early bird tickets. It should help attract more attendees before the standard price ticket kicks in.
3. Start to push the event through media sponsors.
4. Publish the information about the deadline of “call for presentations”.
5. Consider issuing a press release about your event to announce your sponsors and keynote presenters.

1 week to go...

The week before the event it is the optimal time to summarize all the tasks and to simulate the Day with your team. Step through all planned activities for your event - from the registration process in the morning to the panel discussion at the end of the Day. Take time with this activity and capture solid notes. It is crucially important for organizers to ensure everything is prepared and that no unexpected surprises will pop out.

Tip: Ask someone who is interested in this event to simulate the Day with you. Talk to him/her how the Day will run, what will happen hour by hour. It helps to realize what you might have forgotten, what you need to improve or to adjust.

The last week is the week for sending reminder emails. Prepare the email templates to send to speakers, sponsors, media sponsors and registered attendees and share important information with them. Below is an example email sent to speakers:

We're excited to have you speak at the Summit next week. Here's what you need to know!

Hello Summit Speaker!

We look forward to you speaking at the [OpenStack Summit in Austin](#), next week, April 25 - 29.

SESSION INFORMATION

Please take a moment to review the [Session Schedule](#) for your session date, time and room assignment and **verify that your name, title and company are accurate**. If your headshot and/or biography do not appear on the schedule or the information is incorrect in any way, you can update your info via <https://www.openstack.org/profile/speaker>.

Most sessions are 40 minutes long, with a 10-minute break between sessions. Hands-On Workshop sessions are 90 minutes long. Sponsor Demo Theater sessions are 20 minutes long. Please arrive to your session room at least 10 minutes prior to the start of your speaking slot and please be considerate of other speakers by ending your session on time.

BRING YOUR LAPTOP

As a reminder, you will present from your own computer so please come prepared with your VGA or DVI compatible laptop with your 16:9 presentations loaded and ready to present. If your laptop needs an adapter to connect via VGA or DVI (i.e. Macs require a dongle), please bring that as well. If you require another type of connection, have a demo, or will use more than one connected device, please notify your speaker manager immediately.

There is no conference presentation template, however we do ask that you begin your presentation with a title slide; include your session title, your name and title, as well as your company name.

ON-SITE CHECK IN

If you have not already registered, please do so now! **Your free speaker registration code expires TONIGHT, April 19 at 11:59pm PT (April 20 at 6:59 UTC).**

Onsite Registration Check-In is located in the ACC- Level 1- Solar Atrium (near corner of Trinity and 4th street) from 3:00 PM – 7:00 PM (15:00 – 19:00). Pick up your badge early and avoid the lines Monday morning! Registration will reopen on Monday morning at 7:00 AM (07:00) for those who arrive later.

View the [Map of the Summit campus](#).

Speaker Onsite Registration Check-In Hours:

4/24/2016 Sunday: 3:00-7:00pm (15:00- 19:00)
4/25/2016 Monday: 7:00am- 8:00pm (7:00- 20:00)
4/26/2016 Tuesday 8:00am-7:30pm (8:00- 19:30)
4/27/2016 Wednesday: 8:30am-6:30pm (8:30- 18:30)
4/28/2016 Thursday: 8:30am-6:30pm (8:30- 18:30)

Beth Nowak and Joe Schlick will be on-site Sunday April 24 - 29 to assist you. Our contact information is at the bottom of this email.

SCHEDULE/MOBILE APP

Build your Personal Summit Schedule within our Summit mobile app.

iOS and Android users download here: <https://www.openstack.org/summit/austin-2016/mobile-apps/>

The mobile app includes a "FEEDBACK" button on the description page for each individual session. This allows the attendees to provide speaker and session specific feedback - so please encourage the audience to provide feedback on your talk!

See you in Austin!!

Source: OpenStack Foundation

One of the last tasks is to prepare the ticket batches for registration. Be prepared for last minute ticket printing - it will happen as attendees change, cancel or sign up at the last minute. Do not forget to print your registration list for your team of helpers before the event, and also some blank batches - they will come in handy.

Don't forget to factor into your plans that the venue should be prepared at least the Day before the event.

Tip: Detailed information about the suggested activity timeline and recommendations can be found on the following link:

<https://www.openstack.org/assets/openstackdays/Activity-Timeline-April-2016.pdf>

Make the Event Attractive

There are many technical conferences each year organized all around the world. So you need a competitive advantage to make your OpenStack Days event memorable and an impressive community event. There are some basic recommendations that can make the event more successful.

1. Include a live demo in your program to carry the content and help keep people's interest.
2. Include a presentation by a member of the "Women of OpenStack" to add diversity to your speaker line-up.

Tip: We love the idea of organising a breakfast event for Women of OpenStack and remember it is not just for women - diversity includes all genders.

3. Each hotel will have a different venue capacity so it is important to find a venue that meets your needs. If there are no suitable hotels, you could be more creative and consider venues like town halls, museums, art galleries etc. An extraordinary venue can make the event impressive from the beginning you step foot inside the door. For example, organisers of the OpenStack Days Budapest 2016 chose a castle *Garde Bazaar* to host their event in Budapest. Or the OpenStack Day Nordics where they chose to host their event at the Stockholm Brewery - nice!



Source: <http://openstackceeday.com/>

4. Consider creating a video about your event. The OpenStack Days Nordics organizers did just that. You can find this [video](#) on the OpenStack YouTube channel and also on the OpenStack Days website.
5. People love swag. It connects people and bonds the community with good will and fun. Our secret tip is to create some special kind of swag, sunglasses, etc.



Source: <http://openstackdayprague.eu/>

Source:<https://www.openstack.org/assets/openstackdays/P1040070.JPG>

Post-Plan Organization

So your Day is over and you ask yourself how did it go? You would like to evaluate if your event met your original objectives. Here are some questions, which can help you to analyze the Day and check if it did fulfill your expectations. This type of event retrospective is very effective in identifying areas for improvement for the next year.

- Did the registration process go well?
- Did you reach your target audience?
- Were the speakers effective in delivering the content?
- Were you satisfied with your supplier selection (venue, catering, production, photographer, etc.)?
- Was there any feedback from the attendees? (Learn more in the text below)
- Did you exceed the budget and why?
- What worked well and what is necessary to improve?
- Did you face any barriers during the event?

“Keep in mind that just because the event is over it doesn’t mean that the work is done!”

Evaluation Process

Survey

The internal analysis of the event is always a good way to evaluate your event but it is important to capture the view from outside as well. This includes your audience, speakers and sponsors. They should have their own space to share their opinion. The easiest way to get their feedback is to issue a questionnaire electronically (via direct email or perhaps Survey Monkey <https://www.surveymonkey.com/>). It is nice to thank all your attendees and then ask them for their valued feedback.

Final Budget

Remember to pay everyone and ensure your sponsors pay on time also.

Attendees Analysis

If you used a smart application for your ticket system, the post-analysis will be the easy part. We would like to recommend Eventbrite Apps for your event. You can easily download the number of attendees if you used the application for check-in.

It takes only 15 minutes to verify the number of event attendees...we love Eventbrite!

Post-event Promotion

Add videos and photos to your website through the YouTube channel and promote through social media. Good presentations, which are shared among people who did not attend the event can have a positive impact and attract these people to attend the OpenStack Days next year.

Tip: Stream the video presentations immediately at website.

Prepare the press release and distribute it among your media partners with photos from the event. Interviews with speakers are an interesting kind of promotion as well.

Summary

Dear future organizers,

We really appreciate you reading this guide. This guide should encourage you and give you “drive” to start with your organizing. It can be fun. 😊 Our goal was to provide you with some instructions, links, and our experience which can be helpful as well as we are open to chat with you and discuss to support you in organizing your Day.

The last recommendation of this guide is: During the day of the event, find a moment for yourself. Stop for a while, look around and enjoy the feeling that you made something special because:

“Local OpenStack Days help create the world’s OpenStack community.”

We would appreciate your comments and suggestion about this guide to how to improve and make this booklet more helpful for the next organizers.

Finally, we would like to sincerely thank you the OpenStack Foundation for the useful comments, suggestions and engagement throughout the organizing process. Furthermore we would like to thank all of the other OpenStack Day organizers around the world for your contribution to the OpenStack Day community, and to the Czech and Ireland OpenStack Community for their support along the way. We also like to thank all participants of the OpenStack Days Ireland and OpenStack Days Prague who attended the event and helped to make our Days successful and memorable.

List of useful links

https://www.openstack.org/community/events/openstackdays#tab=host_tab

<https://www.openstack.org/legal/community-code-of-conduct/>

<http://www.openstack.org/brand/event-policy/>

<https://www.openstack.org/privacy/>

https://www.openstack.org/community/events/openstackdays#tab=about_tab

<https://www.eventbrite.com/>

<https://www.surveymonkey.com/home/>

<https://www.paypal.com/cz/webapps/mpp/merchant>

<http://mailchimp.com/>

<https://sched.org>

Check the OpenStack Days website to get the links to all of the OpenStack Days events around the world.

Here is a complete list of OpenStack Day events, organizers and contact information.

North America	Event Title	Organizer
	OpenStack Days Texas	Melvin Hillsman, info@openstackhouston.com
	OpenStack Days Silicon Valley	Rachael Renski, rrenski@mirantis.com
	OpenStack Days East	Frank Days, frank.days@tesora.com
	OpenStack Days Seattle	Sriram Subramanian, sriram@clouddon.com
	OpenStack Days Utah	Claron Twitchell, claront@gmail.com
EMEA		
	OpenStack Days Poland	Bartosz Niepsuj, bartosz.niepsuj@compendium.pl
	OpenStack Days Istanbul	Ahmet Turkgil, ahmetturkgil@gmail.com
	OpenStack Days Israel	Jeremy Hess, jeremy@gigaspace.com
	OpenStack Days Budapest	Marton Kiss, marton.kiss@gmail.com
	OpenStack Days Prague	Hana Sulcova, hana.sulcova@tcpcloud.eu
	OpenStack Days Ireland	Haidee McMahan, haidee.mcmahon@intel.com
	OpenStack Days Benelux	Ruud Harmsen, R.Harmsen@fairbanks.nl
	OpenStack Days Nordics	Özgür Bal, ozgur@citynetwork.se
	OpenStack Days Germany Enterprise Event	Ralph Dehner, dehner@b1-systems.de; Christian Berendt, christian@berendt.io
	OpenStack Days Germany, DACH	Christian Frank, chfrank-cgn@t-online.de
APAC		
	OpenStack Days Korea	Jaesuk Ahn, bluejay.ahn@gmail.com
	OpenStack Days Tokyo	Akihiro Hasegawa, hasegawa@bit-isle.co.jp
	OpenStack Days India	Kavit Munshi, kavit@aptira.com
	OpenStack Days Taiwan	Chris Huang chrishuang@mail.ihome.com.tw
	OpenStack Days China	Anni Lai, anni.Lai@huawei.com
	OpenStack Days Thailand	Abhisak Chulya, abhisak@nipa.co.th
Australasia/ANZ		
	OpenStack Days Australia	Jessica "Jess" Field jess@aptira.com
Central - South America		
	OpenStack Day - Security Event	David Chadwick, d.w.chadwick@kent.ac.uk
	OpenStack Days Mexico	Nadia Andrea Goncebat Isaack, ngoncebat@kionetworks.com
	OpenStack Days FISL	Marcelo Dieder, marcelodieder@gmail.com
	OpenStack Days SÃO PAULO	Marcelo Dieder, marcelodieder@gmail.com
	OpenStack Days Natal	Samuel De Medeiros Queiroz, samueldmq@hpe.com

Thank you to our contributors:

Haidee McMahon

SDN/NFV Orchestration Engineering Manager at Intel

OpenStack Day Ireland

[@haideemccaffrey](#)

haidee.mcmahon@intel.com

Hana Sulcova

Account Manager at Mirantis

OpenStack Day Prague

[@hanasulc](#)

hsulcova@mirantis.com

Denise Ridolfo

OpenStack Foundation

[@drridolfo](#)

denise@openstack.org

Frank Days

VP Marketing at Tesora

OpenStack Day East

[@tangyslice](#)

frank.days@tesora.com

David Van Everen

Head of Demand Generation

OpenStack Day Silicon Valley

dvaneveren@mirantis.com