Event Playbook

There are currently two types of official Apache events - ApacheCon, and Apache Roadshows. The following playbook describes what is involved in running these events, and MUST be followed by anyone wishing to run one of these events.

This page is a work in progress, and will replace https://events.apache.org/about/apachecon/playbook.html

References:

- planners@ refers to the semi-private email list planners@apachecon.com
- fundraising@ refers to the foundation-private email list of fundraising@apachecon.com
- sponsor@ refers to the semi-private email list sponsor@apachecon.com
- concom@ refers to the foundation-private email list of concom@apache.org

Step Zero: Before you get started

- Plan ahead
  - Roadshows MUST be announced/posted on the apachecon.com site with prospectus at least six months in advance
  - ApacheCons MUST be announced before the end of the previous calendar year's
- Obtain permission
  - Obtain permission from the VP Conferences to use the `ApacheCon` or `Apache Roadshow` name by contacting planners@
  - Review the Event Branding Policy and secure permission for any events not produced directly by the ASF or its contracted producer(s).
  - If you are an Apache PMC running your own event, please review the policy to ensure you're presenting the best face for ASF brands.
- Subscribe to the planners@ and sponsor@ lists
- Create a budget for the event
  - A good starting point is the Roadshow budget list template
  - Post the budget to the planners@apachecon.com list for review and approval
  - This must be done before the event is approved, and thus must happen **at least** six months before the date of the event.
- Plan for fundraising
  - Understand the event sponsorship sales process and decide how sales will be handled
    - Start with a ping to fundraising@ - the committee will walk you through the process
  - Identify an Event Sponsor Ambassador for the event separate from the event chair and inform fundraising@
    - **Note:** Contact with all Foundation sponsors MUST be coordinated through fundraising@
    - Be responsive to sponsor queries in a timely, professional manner
    - Provide proactive updates as noted in the Event Sponsor Ambassador document
    - Ensure sponsors are engaged with event planning teams for logistics (expo/booth set-up and tear-down details, shipping information, etc.)
  - Create a sponsorship prospectus
    - Follow the TEMPLATE format created by ASF Conferences
    - Delineate offerings and benefits to the sponsors as well as tell the story of The ASF (cannot be a simple "menu")
    - Ensure the packages offered meet production budget needs
    - Be approved by ASF Fundraising by VP Fundraising on planners@ or fundraising@
    - Set the contact to be sponsor@ list

Pre-event planning

- Select date(s) and location of the event. See Location Considerations
  - Coordinate these dates with planners@ to avoid schedule overlaps (at least six months between events)
- Going live
  - Publish event website with event information a minimum of **six months** before the event date with the sponsorship prospectus
  - Notify members@, commiters@ and all dev@ and users@ lists of an upcoming event.
  - **Note:** There are special procedures for committers@ and dev/users@ addresses
  - Notify all PMCs that there is space available for project summits and see if they can provide curated content by deadline. Work from scarcity (i.e, "only four rooms available!") rather than making this appear to be a wide-open venue into which people can wander later.
- Execute Marketing Plan
- Recruit/Identify Track Chairs
- Call for Presentations
- Talk Selection
- Schedule announcement
- Educational outreach
  - Identify local universities
  - Reach out to Computer Science or Information Systems department
  - Make posters and offer a free ticket in exchange for printing, posting them up
- User group outreach
  - Identify local usergroups/meetups
  - Offer reg code for these groups
  - Get local contact to attend meetups and promote the event

The Event

- Hackathon
- Social Media
- Announcements
- Social Gatherings

Post-event tasks

- Post-event survey
- Post any video, audio recorded
- Request slides from all speakers. Post on schedule website
- Post-event report sent to planners@apachecon.com
- Sponsor ambassador must follow up with all sponsors as noted in the Event Sponsor Ambassador document