



How to Organize a Birding or Nature Festival

by Nancy S. Millar

A step-by-step organizational manual
for promoting and implementing a
birding or nature festival in your community

Distributed by:
American Birding Association
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INTRODUCTION

Organizing and hosting a birding or nature festival, if done properly, is a huge undertaking. It is tiring and can be almost overwhelming. But it is also fun and incredibly satisfying. Making a difference in one's community is what we all want to do, and if you can have an economic impact *and* help the conservation cause at the same time, it can be one of the most rewarding moments in a lifetime... and one of the most memorable.

A festival can be an amazingly effective way of shaking up a community—of awakening it to the value- and potential of nature tourism. I know. I've seen it work more than once. A festival—if organized well and publi-

cized effectively—can turn things around in your city or county, too.

This text will explain, step by step, how to organize and host a nature festival in your community. It will list necessary partnerships and steps for planning and organizing the event, as well as pitfalls to avoid. It will also offer tried and true techniques for organizing, for working with volunteers, and for getting community buy-in.

This system works. Many festivals throughout the nation have used this framework, customizing as they went, to host successful festivals. Your community can, too.

Nancy Millar



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1

THE VITAL FIRST STEPS

GATHERING YOUR CORE VOLUNTEERS

The first thing you must do, once you have determined that you do indeed want to proceed with the festival, is to assemble a group of people who may be interested in working on the project. Speak with someone involved with a nearby refuge or State Park, an environmental organization, a birding group, a well-known birder in the community. Ask for the names of a dozen or so people who may be willing to help. Come up with a few people you know who are good organizers and marketers. Include a couple of people who are community leaders, also. These people can be your community liaisons, or can suggest someone who might be good for that role.

You must have expert advice on birding sites and certain elements of the festival organization. Without it, you may come up with a lovely festival, but one that has no attractiveness to birders at all. Not every birder will be a good organizer, and not every organizer will know anything about birds. And organizers and birders may not be well placed in the community or know the ins and outs of marketing. It is imperative to have *birders, organizers, marketers, and community liaisons*, represented in your core group. All four elements are vital to the successful implementation of your festival.

FINDING A NICHE

Not all areas are naturals for a general birding or nature festival. Some parts of the country are well known for migratory birds or a large number of indigenous species. Others have a specific species that frequents the region. Ascertain, with the assistance of a local birding authority or two, the most



reasonable attraction your area has and play on that strength. Do not try to force a non-existent strength. Birders and other naturalists won't fall for it.

COVERING THE FUNDAMENTALS

Pulling a festival together will take a lot of people. We've all seen events that had one person doing all the work. As capable a worker as that one person may be, an event cannot be as good as it would be with a dozen people really committed to it. So use the strengths and passions of other- from the beginning.

Start by calling your people together to discuss the fundamentals of the festival. Discuss the strengths and weaknesses of your area. What time of year is best? What elements should be included in the festival? What is the purpose (mission) of the festival? What is a realistic time frame to shoot for? Who is your target- advanced, intermediate or beginning birders? What other major

regional or national events may conflict with your timing or your marketing focus?

- Be realistic in your answers. Don't allow people to sway the group with what they think should be, rather than what really is.
- Once these questions are answered honestly, you have something to go on. You can then question the individuals in this group about their preferences as far as responsibilities.
- Ask for suggestions of others to fill in the gaps.
- Don't be surprised if several people are willing to come to a meeting or two, but do not want to take on the responsibilities of an entire committee. That's OK. Their input can still be very valuable.
- Stay organized. Nothing can kill enthusiasm for a good idea like a lack of organization.
- Assign responsibilities to the group. This will obviously spread the workload, but will also be likely to help keep interest high.

COMPILING THE FESTIVAL NOTEBOOK

At this point, it is time to put together your Festival Notebook. The notebook is a compilation of all committee responsibilities, a listing of volunteers' addresses and telephone numbers, the festival's mission statement and goals, meeting minutes, and all collateral pieces and other information as it is gathered and developed. Each committee chair should have one. New information should be handed out regularly so that the Notebooks are always up to date. The table of contents may read something like this:

- I. Mission Statement and Goals
- II. Budget
- III. List of Volunteers and Staff
- IV. Individual committee responsibilities, time lines and collateral pieces
- V. Meeting Minutes
- VI. Notes



2

SELLING THE CONCEPT TO YOUR CITY, COUNTY, BOARD

KEY PLAYERS

A vital first step is to garner the financial and emotional support of key individuals and organizations in your community. Any one person or group can institute a birding festival- with the support of the community. **Sell key players in the community on the economic impact such a festival can have, and your battle is half won.**

Selling the concept of a nature festival to your locale's chamber of commerce, convention and visitors' bureau or top governmental leaders will be an easier task today than it was even three or four years ago. There is a wealth of information available that proves the significant economic benefit of nature festivals. With the growing interest throughout the continent in nature tourism, there are few people involved in the economic progress of an area who have not heard stories about successes in other communities from such events.

SELL THE ECONOMICS

The key to garnering the vital support of your city, board, and others who will provide volunteers and critical resources, is selling them on the financial value of the project. This is of paramount importance! Sell them on the economic impact of the hundreds or thousands of tourists who will be pouring into your community. Sell them on short term and long term benefits.

Do your homework. Research the impact of nature tourism and birding in general. Gather information on other festivals. Talk to local national wildlife refuges, state parks,

local conservation organizations, the state departments of commerce and parks and wildlife, your local tourism arm. Find the facts and present them in a concise and organized way to the decision-makers in your community. If you can have an ally or two in the group already poised to support you, all the better. Bring in an expert if it will help.

BE PREPARED

As strange as it may seem, the more bells and whistles in your presentation, the more seriously you are apt to be taken.

- Prepare not only national and statewide economic information on birding and wildlife watching in general and nature festivals in particular, but on the potential economic impact locally.
- Base your projections on conservative estimates, and figure local retail sales tax, number of hotel room nights you expect to be sold, and anything else you can think of. There is still a faction out there that only snickers at the thought of birding having any significant impact in any way. Prove those people wrong with a top-notch presentation of your idea!
- *Ask for volunteers.* Having board members on your festival committee will go a long way in establishing the credibility of the project. Volunteers often tend to react more positively to other volunteers than to staff members alone.
- Do your research. Attend a festival or two to learn what to do and what not to do. You will learn a lot.

SOLICIT SUPPORT FROM YOUR CITY OR COUNTY

After you have the support, or at least the approval, of some key vital partners, ask for what you need. Do you need a building in which to hold the festival? Ask for it! Usually you would need to speak to your mayor or city manager, who can approve the use of public buildings -hopefully, for free. After all,

- : this project will be a tremendous benefit to
- : your community: it will bring in money and
- : positive publicity. You may also want to
- : consider schools, private buildings, or refuges
- : or parks.
- : Involve key community leaders for cred-
- : ibility and financial support. Find a local
- : expert. Speak to leaders individually if neces-
- : sary. Start with those already sensitive to the
- : issues.

3

VITAL PARTNERSHIPS

IDENTIFYING PARTNERS

Certain groups and individuals will be critical to the success of a festival. These will include a funding source or sources, an office support system and someone strong in marketing techniques. Ask for help and for contacts. Call a meeting of a number of these people, and solicit support. Then, ask questions about key government and business leaders to find some who are supportive of nature or conservation related topics. Solicit their support in speaking to those who you feel will be key to the success of the event.

If you are associated with a Chamber or CVB, find one or more key volunteers who will champion the idea among the others. Involve these people from the beginning so that they have a real proprietary interest in the project.

HOW TO SELL THEM ON THE FESTIVAL IDEA

Selling the various businesses and groups on the viability of the festival will increase the credibility of the event from the beginning as well as offer possible funding sources.

- : What you want to do is to elicit their
- : enthusiastic support.
- : Customize your approach to the groups'
- : primary interests, always playing to the con-
- : servative. Your credibility will be shot before
- : it is established with inflated, unsupportable
- : claims on tremendous economic benefits or
- : unbelievable environmental goals the first
- : year. Meeting or exceeding conservative
- : goals is much more impressive that falling far
- : short of inflated goals.
- : These groups and organizations could be
- : approached for support:
- : • Chamber/convention and visitors' bureau
- : (emphasize publicity value, economic
- : impact)
- : • Local environmental organizations (em-
- : phasize environmental value to commu-
- : nity)
- : • Media (emphasize economic impact)
- : • Local businesses (emphasize economic
- : impact or environmental impact, depend-
- : ing on circumstances)
- : • City government (emphasize economic
- : impact, positive publicity value)
- : • Volunteers (emphasize it all-and make it
- : fun)

4

THE IMPORTANCE OF THE MEDIA

COMMUNICATION WITH YOUR MEDIA

Perception is reality. If the local media reports that the festival is a good idea, and that it is a success, then that is what the public, sponsors and potential sponsors will believe.

- It is vital to establish an early and strong relationship with the local newspaper. Invite the editor out to lunch and explain the potential economic ramifications of the festival.
- Give him or her an overview of what you will be doing. Take along story ideas- the more unique the better- and requested dates for coverage.
- The ideal situation would be to get the editor or other well-placed employee to volunteer as a worker.

The importance of a good working relationship with the local media cannot be over emphasized. If the newspaper, radio, and television give attention to your event, it will not only receive invaluable exposure to potential attendees, but it will also add to the credibility of the festival for potential sponsors and other potential partners. The local media can make or break you, so make believers of the editor, the reporters, the photographer, the various section editors, the program directors, on-air jocks, everyone you can. Newspapers like to have their stories picked up by other papers, so help them come up with "hooks," or angles, which give the story a unique perspective and are therefore more likely to be circulated to other markets.

MEDIA CONFERENCES

A media conference can be a good way to announce the event to the public—but only if it is well organized. Here are some pointers:

- Be sure to have it well scripted, with preferably, more than one person speaking.
- If you have any speakers lined up or important attendees registered, all the better. Release their names.
- Have "ringers" in the audience to ask the questions you want to address: sponsors already signed on, anticipated economic impact, "more info" contacts, etc.
- Have media kits put together to hand out with the schedule of events and other pertinent information. Always include economic impact information and a contact and telephone number for more information.
- Have a media release printed up complete with quotes included in the packet.



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- Be aware when talking to the media that “sound bites,” or short, catchy phrases are much more likely to be quoted than long, involved sentences.
- Deliver the packets to any invited media that did not show.
- Plan the timing of the event carefully. Check with your marketing expert who will undoubtedly have day and time recommendations.

PUBLICITY

There are plenty of free ways to spread the word about your festival. With a little effort, you can uncover many opportunities in your community to tell people not only about the event, but also why your organization is doing it in the first place.

- Offer yourself as speaker on TV and radio talk shows or newsbits. Have planned major points, including the potential economic impact. Ask for free space/time in exchange for sponsorships.
- Attracting a famous “name” to your festival, whether as a speaker or as an attendee, will give you wonderful publicity opportunities. It has the added advantage of contributing instant credibility to the event.
- Speak at civic organizations such as Rotary or Kiwanis. Those groups are often anxious for speakers.
- Consider contacting libraries, schools and other places with display space. They may be happy to give you an area to use for the month or two before the festival.



- If you have a museum, contact the director well in advance about hosting an exhibit related to nature during your festival. Your organizations can then support each others’ efforts through cross-promotion.
- Don’t forget environmental organizations in town. Ask them to mention it in newsletters or other communications with members.
- If you have a bank as a sponsor, see if the bank will enclose a flier you produce in with its statements the month before the festival.
- One year our newspaper produced tray liners for us that the local Burger King chain used in eight area restaurants the two weeks prior to the festival.
- There are dozens of free ideas. Remember it never hurts to ask!

5

THE FESTIVAL

STRUCTURE

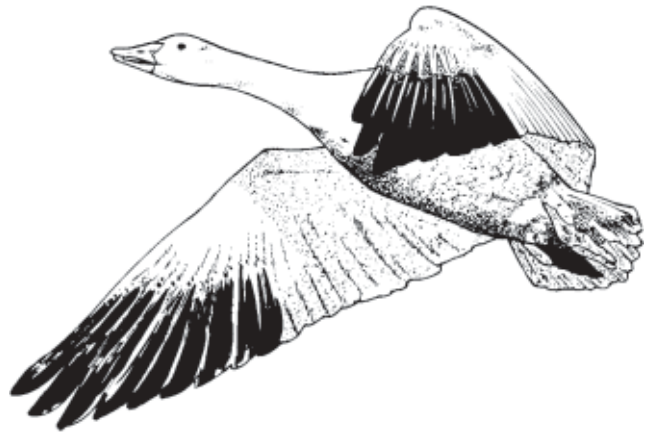
Decide on the main components you want to incorporate onto the event. They will probably include seminars and field trips. Decide on any other areas: a trade show, specialized workshops, children's involvement, a dinner, any other special areas and events. Delegate one volunteer as chair of each area. Then think of other needs: publicity, technical support, registration, finance, volunteer coordination, hospitality.

Delegate! There will be myriad details. It is probably a good idea for the festival volunteer chair and the main staff contact to be kept fairly free of specific areas of responsibility, as many details will come up that will require a good deal of time, especially in the first year.

STARTING OFF ON THE RIGHT FOOT

Very important to the smooth running of an event of this size is the understanding from the beginning of the areas of responsibility of workers.

- Elect or appoint officers. The festival will require a chair, secretary and treasurer at the very least.
- Have written descriptions of responsibilities from the very beginning. Without written responsibilities and limitations, it is very easy for volunteers to believe their role is an advisory one and feel that others will handle the actual work. This can kill the event before it happens. The project will be too large for one or two people to handle. It truly needs strong leaders in each of the identified areas.



- Motivate the volunteers by empowering them. Allow them to make the decisions in their areas.
- Save large, comprehensive decisions and policy, however, for the executive committee.

NINE MAIN POINTS TO REMEMBER

1. Decide on the elements of the festival.
2. Develop a mission statement, goals, budget, timelines. Be realistic.
3. Develop a logo and use it consistently.
4. Decide on the target market.
5. Decide on program format and fee structure.
6. Appoint/elect an executive committee.
7. Develop bylaws even if not incorporated.
8. Appoint/elect a steering committee, all committee heads & other major positions.
9. Decide on individual committees: seminars, trade show, registration, publicity, sponsorships, field trips, technical, education, planting, historian, hospitality, signage, communications, novelties, transportation, financial, volunteer.

6

SEVEN (+ 1) AREAS TO AVOID

1. A lack of communication can be devastating. Keep your primary volunteers and organizational partners aware of the progress of events.
2. Biting off too much the first year can be disastrous. Run a test event or a very small festival the first year. You can always grow it the next year.
3. Organizing the festival without experts in all four areas: a nature expert, an organizer, a community liaison and a marketer, will not work well. It may seem like a time saving idea, but it's a bad one. Don't do it.
4. Don't make promises you cannot keep. If you can't do it, don't promise it. There is no faster way to destroy the event's credibility. Remember to aim for giving people more, not less, than they expect.
5. A lack of professionalism can also inhibit the festival's ability to attract competent volunteers and necessary sponsors and partners. Everyone wants to be a part of a winning event. Presenting sloppy or incomplete work will drive valuable players away.
6. You may have what at first glance appears to be attractive offers to partner with other groups, events and organizations. Be wary. Sometimes the match is good; however, it is wise to look at the possible partnership from all angles before deciding to join forces.
7. Don't overlap with other major functions. Check other major birding events and regional events for conflicts, which could affect the turnout or the ability of your locale to handle your crowd. We need to be wary of certain times of the year when our hotels and airlines are full, for example. What you don't want is to have a festival that people can't get to or have no place to stay!
8. Don't forget to have fun!



7

VOLUNTEERS

MAKE THE PLANNING FUN

Having a handful of dedicated volunteers is of paramount importance. It will not be possible to implement an event of this scope without volunteers who are willing to spend a good deal of time and effort dedicated to the festival.

- Important keys to finding and retaining volunteers are to make the meetings energy-filled, productive and fun.
- Don't be afraid to do little things to make the volunteers smile. We have had happy interruptions for special guests, surprise birthday pinatas and cakes, and pauses to celebrate birding milestones, among other things.
- Be sure that the meetings move ahead at a good pace—although, being realistic, you can expect the first meetings to be long ones. There are lots of details to discuss!
- Also—and this is vital—make sure the volunteers feel needed. Have specific duties for each to accomplish, even before the timelines are finished and distributed. Give them time at the meetings to report on their work and progress.
- If you have more volunteers than you do committees, consider appointing some subcommittees based on the talents of the individuals. Remember that people want to be a part of a committee in order to make a difference.
- Consider having chairs-in-training for the most vital or difficult committees.
- Be wary of asking too much of any one person. Volunteers may be scared off if too much is expected of them, especially when working with a brand new event.



THE IMPORTANCE OF BONDING

Bonding with the group is very important. It will increase the volunteers' desire to work harder, and will definitely make the project more enjoyable for all. Consider beginning with a birding trip to familiarize the non-birders with what it's all about. It will be educational (remember, not all of your volunteers will be birders), probably a lot of fun, and an important bonding opportunity.

You may also want to try "dry runs" of some of the field trips you will offer, depending on the group's comfort level with the different destinations. This is another opportunity for bonding.

FINDING THE BEST VOLUNTEERS

- Start with a core group. Grow from there. Include birders, organizers, people well connected in the community, a marketing expert. If you can attract professionals (attorneys, CPA's, others) whose services could come in handy, all the better.

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- Remember that people who have staffs they can offer for projects can be doubly valuable from a manpower point of view.
- The Great Volunteer-Attracting Secret: Make it fun! Joint projects—time intensive details that have to be taken care of—can be a great opportunity. Plan “parties” to take care of big projects such as signage preparation (Poster Party), registration package preparation (Ticket Party), or similar projects which are large.
- Encourage inside jokes. We have had several over the years—some just silly, many related to incidents that were funny and involved committee members.
- Energy! Have it! Volunteers are like anyone else—they would rather be doing something that is fun than something that is boring.
- Match talents carefully with jobs. If you solicit volunteers and offer them something to do that is right up their alley, they are much more likely, obviously, to want to be a part of it all.
- Identify hard workers and ask them for ideas on others who may want to volunteer. Hard workers tend to hang out together.

KEEPING THE VOLUNTEERS AND OTHER PARTNERS ONCE YOU’VE GOT THEM

In the corporate world, it is a well-known fact that it costs less to maintain a worker than it does to train a new one. The same could be said of volunteers and paid workers. And though you may not be talking about maintenance costs in the traditional sense, there certainly is a time cost in training a new person. There is also a loss of history, of course, when a volunteer or worker leaves.

And you of course will want to keep sponsors happy. So it makes sense to try to hold onto good people when you have them. Here are some ideas:

- Listen to your volunteers, speakers, trip leaders. They will have valuable input.
- Take what attendees say with a grain of salt. Remember, you “can’t please all the people all the time!”
- *Thank* your volunteers thoroughly. Acknowledge them privately and publicly as much as possible. Give volunteers every opportunity to shine.
- Thank your sponsors and keep them in the fold by including them as much as possible in events and publicity.



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8

MONEY—HOW TO GET IT

The festival will need money—maybe a lot of it. Unless your organization has very deep pockets, and is willing to dig into them, it will likely be up to the steering committee to find the funding.

1. Corporate sponsors are a great resource. Look to businesses that are community-minded, or ones that are trying to improve their images. Environmental projects are often very popular.
2. The trade show, should you decide to include one, should make money. Charge enough to cover your costs and then some—but don't get greedy or you may scare off some attractive exhibitors. The exhibitors' fees can always be raised in subsequent years. It can damage the credibility of the event, however, to decrease the fees.
3. Look for in-kind sponsorships. The festival will need printing; speaker travel, meals and accommodations; rental equipment; publicity; graphic design; a location; what else? The festival will have publicity value. Use it to your advantage.
4. Registrations can also, of course, be a revenue source. Be careful to budget conservatively. Since registrations will be received after most of the funds have been spent or committed, it is dangerous to depend on inflated or even aggressive numbers, especially the first year

5. Consider grants as an option also. Large foundations and corporations often have seed money for programs that encourage environmental awareness. This is a time-consuming process, so take into consideration that if a funding source is located, it may be months before the funds are actually received.
6. Other income producing ideas could include auctions, special events during the festival such as a dinner, or even events outside the festival intended specifically as financial support events.



9

THE YOUTH EDUCATION ISSUE

The attraction of involving children in the festival is a no-brainer. Capture their interest at an early age, and you have the opportunity to make a difference that will last for generations to come.

Our various festivals have involved children in many ways. One has sponsored very popular art and essay contests before the event, with winners presented with awards during the festival. Another spun off a full-blown event just for schoolchildren where we bus in 4,500 elementary students in two days to participate in live animal presentations, animal displays, arts and crafts and other nature activities held under tents in a city park. High school students are also involved, as volunteers to assist with the younger children.

- If you decide on involving students, begin early. Take into account the school year schedule when planning what form your city's children's participation will take. Whether you plan on publicizing through the school system or having an even closer partnership, teachers need plenty of lead-time to plan participation.
- If you can, involve a teacher who can work from the inside and who understands how other teachers will react. S/he can offer valuable insight into effective ways to motivate other teachers to spread the word or even carry the ball.
- Be organized. Most teachers are, and appreciate working with others who are.
- Consider planning a workshop for the first year if necessary to give interested teachers more information.

- Consider involving as many age groups as you feel you can handle comfortably.
- Find credible judges for any competition you offer (this is a good way to get media involved).
- Also consider involving scout troops
- If you don't feel that you can tackle something as large as special events geared for students, consider asking a speaker or two to be available for a school presentation before the festival in order to help promote it, of course!
- Contact your school district about being allowed to offer continuing education credits to teachers for their participation in your events. Then make sure they know it!



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10

PLANT!

If a locale wants to attract birders, there have to be birds. There are no birds without habitat. Therefore, it is *absolutely* necessary to encourage the preservation and enhancement of native habitat. If resource preservation is one of your goals, also, I highly recommend this committee to you as well.

- Encourage native planting every time you talk to a reporter, every time you talk to a service organization. Tell children how important it is and why. Tell your sponsors. Tell your volunteers.
- And the do it yourselves! Plant a garden of bird-attracting plants in city parks, on

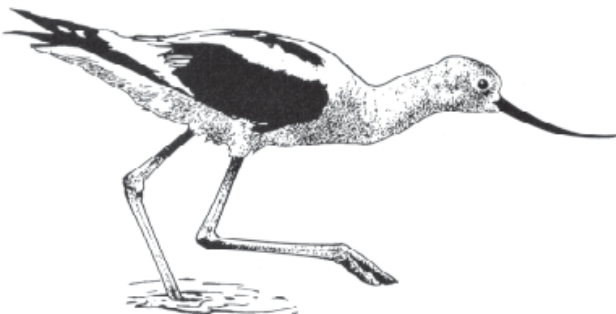
school grounds, in business landscaping, at private homes.

- Encourage others to plant natives. Start with your volunteers and sponsors. Take a photo and offer it to the paper every time a business landscapes with natives. (Mention the festival, of course!) Take the idea to schools, to public buildings, even if you donate a plant or tree.
- Talk about it. Consider having lots of native plants for sale at your trade show.
- Consider creating and publishing a list of native plants, what they attract and other pertinent information.

11 WINNING WITH PUBLIC RELATIONS

You can't have a successful event without making sure your community and government leaders are a part of the picture. Even if their support is minimal the first year- as it well may be until the festival has proven itself- give them the opportunity to be a part of it.

- Contact your mayor and any appropriate local celebrities early and ask them to participate in some way. It is certainly advisable to request the mayor's participation by welcoming the attendees the first evening. Look for ways to get them involved. Involvement equates to ownership, and that's the mindset you want from those in the public eye.
- At the media conference, allow the festival chairman and any important government officials to shine. Remember to give credit to volunteers and local officials. Recognition is a very large part of why people volunteer in the first place.



12

AFTER THE FESTIVAL— YOU'RE NOT FINISHED YET!

After the festival is over, your work is not quite finished. There are follow-ups that are every bit as important as the details you so carefully worked on before the event.

- Evaluation forms from everyone- attendees, volunteers, speakers, guides, trade show exhibitors- should be studied carefully. While it is useless to try to please everyone (one attendee will say the festival was too long; another, that it was too short), you will learn much about fine tuning the following year's event from the comments. What you are looking for are clusters of the same comment several times. That is what should alert you to an opportunity to make the event even better the following year.
- Hold a debriefing for key volunteers as soon after the festival as possible. It's amazing how fast thoughts and suggestions can exit the mind. Aim for a de-briefing session within a week.

- Immediately after the festival, hold a survivors' party for all volunteers. This is the appropriate time for the chairman to recognize the volunteers individually with a small memento and more than a few kind words. Again, remember that people volunteer in large part for recognition. Make sure they get it. Celebrate your victories. We usually hold ours hours after the festival- while spirits are still soaring, adrenaline is still pumping and attention hasn't been diverted back to the old routine.
 - Plan a get together for the key players- maybe a birding outing just for the group. It will help to build camaraderie and feeling of family. That's important!
- Make sure everyone is properly thanked: volunteers, sponsors, staff people. You'll want their enthusiastic help again next year, so don't forget this vital step



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13

TIMELINES

These timelines, customized for individual communities, have been used successfully by festival all over the country. I strongly advise actively using them. Simply having them in your notebook won't help. Consider putting each committee on the agenda for every meeting, and going down each timeline's list of activities each meeting. If any committee needs assistance, it will then be evident before panic time. (Knowing that each person will be held accountable will also encourage deadlines to be met.)

- Work out individual timelines for each committee. Begin as early as possible, as many details need to be set with significant lead-time. A year out is not too much lead-time.
- Organize steering committee meetings and executive committee meetings comprised of the volunteer chair, financial committee chair, staff, and a small number of other critical volunteers. (Small is the critical word here. 5-8 is a good area to aim for.) Be sure to include at least one real birder in this group.
- Come to a consensus on major organizational points: the mission, dates and location of the event, most important aspects to cover.
- Empower individual committee heads. Allow each the flexibility to make decisions in areas of responsibility.
- Make it clear to all volunteers that in any decision, they must defer to the executive committee. Often a seemingly small decision can have large repercussions that a volunteer involved with only one facet of the festival could not imagine. Only someone with a more comprehensive view has

the vantage point to understand and anticipate how one decision could affect another area of the festival.

1. Executive Committee:

1 year before:

- Decide on the date and location of the festival. Negotiate for building, maintenance, security, technical assistance, etc. Will there be parking concerns?
- Decide the targeted number of attendees, and how best to reach them.

9 months:

- Make all advertising expenditure and layout decisions.

3 months

- Decide on policy concerning speakers selling and autographing their works.
- Appoint someone to be festival liaison with any other organizations or events that will play a significant part in your festival.

1 month:

- Buy insurance.
- Develop attendee evaluation form.

Collaterals:

- Copies of advertising
- Copies of contracts
- Evaluation form
- Fee structure spreadsheets

2. Seminars:

12 months:

- Decide on format, list of preferred speakers/ subjects.
- Contact speakers with request. Tell them specifically what they will receive: honorarium, expenses, free admittance to festival, etc. Tell them what they won't: accommodations past the festival dates, etc
- Decide whether transportation, accommodation, other offers will include spouse/ significant other.

9 months:

- Follow up with written agreement (may be in the form of a letter) so there are no misunderstandings. Request biographical information, list of audio/visual equipment necessary. Give them a deadline. For some reason, getting this information has always seemed to be a struggle, so give yourself plenty of time here.
- Develop forms for technical, communications, publicity and signage committees to communicate information they will require.
- Work with speakers to plan transportation schedule. Develop calendar of their arrivals, any transportation needs, lodging, meal schedule, any special requests.

6 months:

- Make speaker transportation plans.

3 months:

- Develop an agenda for providing meals for speakers. Supply transportation.
- Plan to pick them up at the airport if necessary.
- Plan for accommodations.

- Have a backup speaker or two on call for emergencies.
- Deliver tickets and transportation details to speakers.

1 month:

- Verify all arrangements with speakers.
- Develop evaluation form for seminar speakers.

1 week:

- Order and deliver welcome baskets to their hotel rooms prior to their arrivals.

After:

- Send "thank yous"

Collaterals:

- Letter to speakers
- Technical requirements
- Biographical information form
- Meal itinerary
- Form for tracking receipt of each stage of contact: contract delivery and receipt, transportation information, biographical information, hotel/transportation assignments, etc.
- Evaluation form to improve following year's seminars

3. Trade shows:

12 months:

- Contract with pipes and drapes company. Decide if they will provide drayage.
- Develop exhibitor invitation to exhibit.
- Decide on rules, registration fees, hours, number of people allowed at booth, security procedures.

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- Plan layout of booths. Take into account electricity requirements.
- Develop list of businesses to invite to exhibit.

9 months:

- Distribute invitation to exhibit.

3 months:

- Send all necessary followup information to vendors: hotel information, and setup and other details they will require.

1 month:

- Develop evaluation form.

Ongoing:

- Monitor registrations; make individual contacts if necessary.
- Return confirmation of receipt of form and check.

During:

- Have a volunteer designated as point person for signing up exhibitors and answering questions.
- Have a volunteer designated as technical assistance while booths are being set up and dismantled.
- Provide evaluation forms for exhibitors to improve the following year's show and to begin the following year's list of interested participants.

Collaterals:

- Invitation to exhibit
- Trade show rules and regulations
- Trade show layout
- Booth registration tracking
- Evaluation form

Tips:

- Keep trade show pure. Make decisions and stick with them with regard to parameters (for instance, non-consumptive nature items only).
- Decide on cost of booths. Keep it underpriced the first year until the festival proves itself. Then, if desirable, you can raise the costs slowly over the next few years.
- Consider separate pricing for profit and non-profit businesses and organizations. Consider tiered pricing for prime and less desirable booth locations.

4. Field Trips:

12 months:

- Decide on venues. Work out arrangements with venues' staff on costs, timing, bus parking, etc.
- Decide on maximum number of people that venues can accommodate.

6 months:

- Find credible field trip leaders. Make sure there are enough and that all are assigned.
- Set up payment system. Plan meals, lodging schedules for leaders. As with seminar speakers, provide all instructions in writing. Make sure someone understands the needs of the leaders as well as participants in planning the venues and actual trips.

1 month:

- Confirm details with leaders.
- Procure insect repellent, water, lunches (if necessary), bathroom tissue, paper towels, "reserved" seat signs for leaders on buses, sunscreen.
- Provide leaders and bus drivers with maps

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of where they are going. Scout areas for birds beforehand if necessary.

- Develop evaluation form for leaders.
- Create maps to sites for drivers.

Day before:

- Give maps to bus drivers. Try to have same drivers assigned to same venues each day. If that is not possible, have extra maps for every day.
- Hold leader orientation meeting night before first trip so all leaders are familiar with basics.

After:

- Collect remaining supplies and store.
- Pay leaders.
- Hand out evaluation forms to leaders to improve following year's trips.

Collaterals:

- Evaluation forms
- Tracking form (similar to speakers' form) for all necessary information
- Maps
- Leader instructions

5. Registration:

9 months:

- Study forms of other festivals (nature or not) to get format ideas. Make it as simple as possible. Have some people not involved in the festival organization process look at your form to see if it is clear
- Proof the form.
- Proof the form again.
- Decide on fee structure: individual events, inclusive ticket, trips separate?

- Give deadline for registration and for refunds. There will be lots of calls requesting more information or clarifying info in the registration form.

3-6 months:

- Mail out registration information.

Ongoing:

- Track all forms as they are received. Good tracking is vital. Have systems set up for tracking funds received. Keep track of seats for seminars, field trips as they are sold. Never oversell!
- If possible, put together packets as they are received. Have a system so forms are easily accessible so that when people call to cancel or change their tickets, they can be efficiently handled.
- Decide what else will be allowed to go into packets: evaluation forms, special information, another schedule of events, necessary reminders about "housekeeping" details, etc.

During:

- Have registration packets available for pickup at a specific date at a specific location. Try not to overwhelm chamber/convention and visitors' bureau staff. Have volunteers come in to help if necessary. (I recommend not mailing tickets. They can be too easily lost in the mail or after received, and then keeping up with tightly controlled maximums is a nightmare.)

Collaterals:

- Tickets
- Registration tracking system
- All information which will be included in packets
- Registration packet envelopes

6. Novelties

12 months:

- Decide on novelties to be sold by the festival as a fundraiser: T-shirts, caps, patches, pins, plastic bottles, festival checklists, books, etc.
- Select an artist and bird. Negotiate with artist on use of artwork. Invite him/her to attend to autograph and/or sell items.

10 months:

- Order items and decide on selling price.

During:

- Sell at event. Keep tight inventory control.
- Decide on comp policy. Will you give shirts to sponsors? All volunteers? Just committee members?

Tip:

- We create special “committee shirts” to give or sell at cost to committee members. This protects our supply of t-shirts and also both acknowledges committee members and makes them easy to identify by attendees.

Collaterals:

- Inventory forms
- Financial forms
- Receipts

7. Publicity

8 months:

- Develop killer media list locally, nationally, and internationally if appropriate.
- Set up calendar of media releases announcing festival, discussing specific aspects of festival. Consider: economic

impact, specific speakers, VIPs expected to attend, children’s involvement, volunteers, planting aspect, city gearing up, bio on leading volunteer, info on specific bird(s) to be highlighted, info on birding or how to bird, impact on local environmental organizations.

- Consider developing a card for attendees to drop at businesses they patronize. This will publicize the economic impact they are making in a very tangible way for businesspeople.

6 months:

- Make sure birding organizations, nature organizations, birding publications, tourism organizations are all on the publicity list. Contact them and ask them how they can help you get the word out. Send them a schedule of events.

3 months:

- Plan a media conference to announce the festival.
- Give the newspaper a list of story ideas for them to pursue before and during the festival.
- Contact local media for specific coverage.
- Offer yourself and other committee members as a speaker for local civic group programs. More than one program can be offered, depending on the areas of expertise of those who would be speaking. Topic ideas could include economic impact of the festival and of nature tourism in general; birds of the area; planting habitat for attracting birds; the children’s program and its potential impact on the area’s youth, to name a few.
- Ask your city and state to pass resolutions commending the organization of the festival, proclaiming the day “Festival day,” etc.

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1 week:

- Prepare media kits to give during or before the festival, as requested. Be prepared to give numerous interviews before and during the event. The publicity contact should be comfortable before a camera.

Ongoing:

- Keep a scrapbook of all publicity received.

Collaterals:

- Media releases
- Media kits
- List of publicity appointments

Tips:

- Each time anyone is contacted, *always* mention economic benefit and *always* give a name and number to contact for more information.
- For committee members who will be giving interviews, supply a “cheat sheet” with information you want mentioned: economic impact, special speakers, dates and location, etc.
- In the media kits, do put media releases, registration information, listing of events, speaker and leader biographical information, list of committee members and sponsors.

8. Volunteers:

This committee is responsible for securing all the volunteers needed during the actual event. Depending on the size of the festival, this could be as many as hundreds of people.

4 months:

- Work with all committee heads to determine the number of volunteers each will require. Work out a schedule of shifts.

- Begin searching for volunteers and get commitments and telephone numbers.

1 month:

- Develop evaluation form.
- Reconfirm with volunteers; apprise them of orientation.

1 week:

- Hold an orientation (or two) for volunteers, providing them with nametags, rules, assignments, verifying their shift(s), introducing them to executive committee chairs to whom they can turn with questions. Make sure they are all comfortable with what they will be doing, when they are expected to do it.
- Invite them the survivors’ party and thank them in advance for their help.

During:

- Act as main contact for volunteers. Be sure to have a specific place designated as volunteer check-in headquarters for last-minute instructions.
- Provide a rest area for volunteers.

Tip:

- Try to commit to as close to the number of volunteers as you think you will need. You obviously don’t want to run short of necessary workers, but you also don’t want people standing around with nothing to do. Under-using volunteers can ruin chances for getting help in subsequent years.

Collaterals:

- Volunteer list and form
- Rules
- Hours log (important for future grant applications)
- Evaluation form

9. Transportation:

12 months:

- Work with executive, field trip, and hospitality committees to decide the number/size of vehicles necessary for field trips, speaker transportation, etc.
- Contract for buses and any other transportation needs.

3 months:

- Verify vehicles.

1 month:

- Plan a bus loading/unloading organization plan. This may be more difficult than it sounds, especially if buses leave before daybreak, and/or if several buses leave at the same time for various destinations. Take safety and parking issues into serious consideration.

1 week:

- Get ice chests.
- Find source for ice.
- Get flashlights and reflective vests, if necessary
- Alert police to the location and time of the bus boardings

During:

- Oversee timely loading and unloading of buses. Make sure that the water, cups and other equipment is on board each bus.

Tips:

- Depending on the number of buses you have going out at the same time, this can be a very, very big job. Having bus departures organized poorly can be dangerous to attendees. One idea is to keep buses off site at a “staging area” until they are

needed. For example, if you have more than one bus going to Location A, and another bus going to Location B at the same time or within a half hour of the A bus, keep the second Location A bus off site until the first one has left, then radio the second to come in to pick up the rest of the Location A group.

10. Hospitality

This committee is responsible for making attendees feel comfortable, and for disbursing information as a benefit to sponsors, partners, etc.

4 months:

- Send out letters inviting selected businesses to display information (coupons, fliers, menus, etc.) on a hospitality table.

1 month:

- Study physical location beforehand and recommend any safety precautions to be taken to executive committee.
- Provide hotel front desk clerks with information on the festival.

1 week:

- Contact taxi companies and car rental agencies to advise that there may be a large number of people requiring their services.
- Find a doctor and dentist willing to be on call during the festival for out-of-town attendees.

Ongoing:

- Gather items to be displayed on the hospitality table.

During:

- Display names and numbers of doctor and dentist who have agreed to be on call.
- Display any pertinent information attendees may need: taxi company numbers, names of restaurants open early to accommodate field trip participants, etc.
- Brief hotel workers and provide events schedules.

Collaterals:

- Letter to hospitality table potential participants

Tips:

- The idea of offering a table for community involvement is especially attractive to a member Chamber of Commerce or CVB.
- When getting information to hotels, ask your contacts how to get the information to the proper people most effectively. It will be the front desk clerks who will need the information, not the sales staff.

11. Communications

10 months:

- Develop and distribute a newsletter several months before the festival to whet the appetite of interested persons you have identified.

2 months:

- Design and distribute publicity posters.
- Develop internal signage for the festival.
- Consider any exposure available to you (library or school displays, for instance).

Collaterals:

- Posters
- Newsletter
- List of contacts at libraries, schools, etc.

12. Signage

1 month:

- Develop posters for individual seminars and presentations.
- Develop sponsorship signage.
- Develop any special signage—concessions area, hospitality table, novelty sales signs, etc.
- Prepare slides to use before seminars thanking individual sponsors. Deliver to technical chair.

During:

- Oversee all signage updates.

13. Sponsorships

11 months:

- Develop sponsorship package: include mission statement and goals, anticipated economic impact information, program details, any publicity, resolutions, letters of support, list of sponsors already committed, list of sponsorship levels and what they receive.
- Contact potential sponsors and procure commitments

1 month:

- Invite to any VIP events

Ongoing:

- Track receipts of funds; re-invoice as necessary.

During:

- Organize receipt of any gifts (T-shirts, posters, etc.)

After:

- Send thank you notes

- Plan and execute any public thank-yours, newspaper ad, etc.

Collaterals:

- Sponsorship package

Tip:

- Make your sponsorship package as professional in presentation as possible. Personalize each one with the name of the potential donor and business name.
- Set appointments and visit potential sponsors. My experience has been that two people— one community liaison and one birding specialist—make the most effective sponsorship team.

14. Technical

This committee is responsible for all audio/visual and other equipment (podiums, tables, easels, etc.) necessary during the festival, including getting 2-way radios and cellular phones, telephone lines for headquarters, etc.

4 months:

- Work with seminar committee to ascertain needs of speakers.
- Begin procuring and/or reserving necessary equipment.

1 week:

- Reconfirm that all equipment will be available as promised.
- Gather equipment.

During:

- Work with venue staff to prepare equipment
- Assist speakers as necessary with equipment

Tips:

- This committee should be very responsible and able to spend long hours at the festival during the presentations, running the slide projectors and any other necessary equipment. It would be a good idea to have at least one helper for the chair so that they can divide duties. If the festival is to be held in more than one building, this person would obviously need extra assistance.
- Plan on the worst case scenario. Have extra projector bulbs, extra markers, extra everything.

15. Education

12 months:

- Decide on what kind of involvement you hope for from children. Decide on age limitations.
- Consider developing a children’s program during the festival for elementary-aged children. Consider including games, songs, crafts, planting a tree, feeding birds, anything kids with short attention spans would enjoy. Keep ages fairly uniform or you will either bore the older kids or the younger ones. Invite special guests with experience working with the various age groups. Decide if you will include a meal.
- Consider developing a program before the festival geared to older students. Ideas could include native planting on school property, volunteering for cleanup or other planting around town, art, essay, sculpture, photography competitions, creative writing. Award winners in various categories during festival. Again, involve a teacher who knows how to work the school system. This is the best way to get to the greatest number of children to participate.

1 week:

- Hold judging for competitions.

During:

- Award each participant a certificate. Award ribbons, trophies, other donated awards (nature organization memberships, binoculars, local field trips, etc.).
- Have artwork displayed. Have written entries published in local newspaper or other environmental newsletter or publication.
- Award winners at festival. Have their picture taken for the newspaper. Contact their schools so the schools can also recognize the students.

After:

- Thank judges

Collaterals:

- Awards
- Participation certificates
- Judging forms
- Individual program agenda

16. Planting

6 months:

- Develop a planting guide that lists trees, shrubs, flowers and groundcover that is attractive to indigenous birds. This is excellent for establishing the credibility of the festival and positioning it as a leader in environmental concerns.
- Develop a list of individuals and organizations that can be of assistance to people interested in doing native planting.

Ongoing:

- Encourage individuals, businesses (start with sponsors), city, county, schools to

plant native habitat. Arrange media coverage (with representation for the festival) for any plantings.

17. Historian

1 month:

- Assign photographers to field trips, seminars, trade show, general.

During:

- Sell duplicate photos as a moneymaker.
- Collect all publicity generated by the festival.

Tips:

- Documentation can help in soliciting sponsors and in providing publicity photos, so consider taking some photos and some slides.
- Keep all festival information on the Internet updated. Pull off any related entries daily and post them, along with other newspaper or other publicity generated before and during the event.

18. City/Community Signage

9 months:

- Decide before the festival where directional signage needs to be displayed.
- Get necessary permission from property owners.

6 months:

- Get permission from the community to hang banners at areas of high traffic. Have banners made. Again, use as few words as possible, possibly just the name of the festival and dates.
- Have banners made welcoming birders for the entrance to the festival.

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2 months:

- Construct signs. They should be large and brightly colored, with few words. Simple is better.

Day before:

- Erect signs the day before the festival.

After:

- Remove and store signs immediately following the festival.

Tip:

- When creating the signs, remember to make the letters thick as well as tall. Think of the most effective billboards you've seen: they contain very few words, and the words are large. There's a reason for both.

19. VIP

3 months:

- Select restaurants for meals for visiting speakers and guides
- Set menu for VIP Room

1 month:

- Make reservations at restaurants for meals
- Prepare schedule for welcoming VIP's as they arrive

1 week:

- Prepare welcome baskets for VIP's

Day before:

- Deliver welcome baskets to hotels
- Reconfirm with restaurants
- Purchase supplies for VIP Room; set up room. Include information on telephone numbers of key contacts, schedule of events; any special information

During:

- Host VIP meals
- Be on site as necessary in VIP Room to keep it well stocked and assist VIP's



14

HOW THE PIECES FIT TOGETHER

Emcee

- If you can, find an emcee who is a naturalist. S/he will be able to add real enthusiasm when introducing your big guns, and will be sure to cover most important accomplishments of speakers appropriately, adding, perhaps, anecdotes or other personalized tidbits to the introductions.
- You also, of course, want to make sure that the emcee is comfortable with a microphone. In the past, we've used a priest and a retired school teacher- both used to talking to crowds.
- This person will be the "face" of your festival, its most visible representative, so be sure it is someone who will make the kind of impression you want people to remember.

Staff

- This person- or group of people- will be responsible for planning and organizing committee meetings, developing a list of all members' names and addresses and telephone numbers- all the numbers you can get (car, pager, home, work). Here are some tips for keeping everyone smiling:
- Give members plenty of advance warning for meetings if possible. Try to get everyone enthused about the project so that there will be a real feeling of commitment.
- Make sure they feel valued. Thank them profusely and make sure they are invited to the survivors' party and thanked in any other way you can think of.

Chairman

It will be up to the chairman to guide the project and keep all the volunteers happy.

- A very nice touch would be to do something special for the executive committee the first day of the festival- just some little sign of appreciation. Our chairs did that, often coming up with some little thing personalized for each of us.
- Expect and accept with grace any memento your committee gives you during or after the event.
- It will be especially appreciated if you personally thank any staff members who often are overlooked but who are vital to the organization and successful implementation of an event of this magnitude.
- Consider introducing all committee chairs on stage, perhaps just before the keynote, saying a sentence or two to personalize the introductions.

Treasurer

The treasurer will obviously play a vital role in the festival. Make sure the person chosen to be in charge of the finances is above reproach and very well organized.

- S/he will need to devise systems for registration and novelty income and the disbursement of fees and other expenses, as well as depositing the funds.
- The treasurer also should be responsible for supplying the steering committee with financial information before, during and after the festival.

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- Consider a voucher system for refunding money after the festival has begun. Vouchers can be used for novelties or other seminars or field trips. This will save much time and effort.

Executive Committee

It falls to the executive committee to keep the energy up and to thank the chairman in an appropriate way. A good time to present her or him with a token of esteem would be during the presentation of the committee the last evening of the festival.

Headquarters Layout

Could include:

- Exhibitor/attendee registration booth
- Novelty sales table
- Finance headquarters (secured)
- Volunteer rest area/VIP rest area
- First aid station
- Hospitality table
- Children's display
- Staging room for equipment



15

A SPECIAL NOTE TO FESTIVAL ORGANIZERS

Because of loose ends, you may not feel that you can afford to take the day after the festival off to rest. You *will* need rest, to be sure; however, it is most likely to be the *second* day following the festival when your body cries for sleep the loudest. That adrenaline will still be pumping pretty hard the day after. Why not plan on working through the day immediately following the festival- to accept all the congratulations you will heartily deserve, as well as to finish up those last details? Take the second day off—and the third, if you can swing it! After all, you probably will have worked several very long days. You'll deserve it!



Resources

There are several resources available for festival organizers. Moving from the general to the specific, here are some:

IFEA: International Festivals and Events Association. <www.ifea.org>

Watchable Wildlife Annual Conference, held in the fall. <www.watchablewildlife.org>

USFWS training: US Fish and Wildlife Services offers a 3½ day class, "Developing Festivals and Special Events," about every year and a half. Instructed by Betsy Wiersma, Nancy Millar and Laura Jones. <www.usfws.gov>

Nature Festivals of America- A new organization devoted to assisting nature festivals. <Naturefestivals@hotmail.com>

State organizations—In many states, there are active departments of parks, wildlife, and also universities and tourism councils which all offer networking and resource assistance to all sorts of festivals.

Biographical Information, Nancy Millar

Nancy Millar is Director of the McAllen, Texas Convention and Visitors' Bureau and Vice President of the McAllen Chamber of Commerce. She has written several articles on nature tourism product development, the value of community buy-in to nature tourism, and nature festivals and their economic impact. Her expertise is in marketing, an area in which she has worked for two decades.



Nancy has been a major force behind the development of the Rio Grande Valley as a model for nature tourism development for other communities in the country. She has created and overseen the implementation of highly successful nature festivals in Texas' Rio Grande Valley in the past nine years. She conceptualized, developed and managed the nationally acclaimed Rio Grande Valley Birding Festival in Harlingen its first three years, and is currently overseeing her Texas Tropics Nature Festival, Wild Walk in McAllen and Monterrey Birding and Nature Festival in Mexico. In addition, she has created and consulted on many projects and events in the region that highlight nature tourism, including an internationally broadcast television series, a regional magazine and several educational programs for schools and the general public.

She has presented at numerous regional, national and international conferences, has instructed the U.S. Fish and Wildlife Service's 3 1/2 -day course "Developing Festivals and Special Events" at the National Conservation Training Center in Sheperdstown, West Virginia since its inception in the late 1990s and offers individual training for communities interested in developing or enhancing nature festivals. Many of her presentations emphasize the value of partnerships between all levels of government, and local business leaders and organizations, to foster community support for wildlife watching and its benefits.

Among other tourism related activities, she sits on the boards of Watchable Wildlife, Inc. , of Texas Travel Industry Association and the Texas Nature Tourism Council. Nancy is also president and founder of Nature Festivals of America. Locally, she is president of both the Rio Grande Valley Nature Coalition and the Friends of the Wildlife Corridor, the support group for two national wildlife refuges, and sits on the board of directors of Valley Nature Center, on the Marketing Committee for World Birding Center, and on the Paseos Verdes/Rio Trails Committee.

She is available for presentations to communities interested in developing a nature festival or enhancing an existing one, and on nature tourism product development.

Her topics include:

- Nature Tourism Development of the Rio Grande Valley
- How to Develop Nature Tourism in Your Community
- Developing Consensus/Finding Support in your Community
- The Political and Economic Benefits of Nature Tourism
- "How to" Basics of Festival Development
- How to Find and Keep Volunteers
- Fundraising and Sponsorships
- Effective Advertising and Marketing Techniques
- Customizing your Festival
- Secrets of Successful Festivals
- Developing Committee Timelines and Budgets

For more information on scheduling a customized presentation, contact Nancy Millar at the McAllen Chamber of Commerce, P.O. Box 790, McAllen, Texas 79505-0790, or call at 956-682-2871; Email: nancymillar@mcallencvb.com