



GUIDE TO PLANNING LOCAL AND REGIONAL ANUSARA EVENTS

SECTION 1: INTRODUCTION

Thank you for your interest in hosting and/or organizing an Anusara event!

This document is geared toward Anusara teachers who are interested in hosting an event and are looking for guidance from the Anusara School of Hatha Yoga (the School). Licensed Anusara teachers at any level of licensure are encouraged to host an event.

The purpose of this document is to provide **support and guidance**, not to be prescriptive. Some of the guidance outlined below will not apply to your event, depending on its size and scope. Use only what is helpful and relevant to *your* event!

This document is intended to cover all events that are not Samavesha, Anusara's annual international festival:

- Workshops
- Retreats
- Festivals
- Any other type of gathering that fits your community

These local or regional events can be of any length: half-day, full-day, weekend, five days, etc. For example:

Scope	Example	Typical attendance
Regional	Benelux Weekend 2018	50
Local	Workshop by a licensed Anusara teacher	20

Events are an important way to:

- Learn new information or deepen your knowledge
- Strengthen a sense of community (kula)
- Practice yoga
- Expose new students to Anusara yoga
- Provide Anusara teachers and students an opportunity to learn from each other in an intimate setting

If you have any questions or concerns regarding any aspect of this document, please contact Event Producer Ashley Sherburne at events@anusarayoga.com.

SECTION II: STEPS TO FOLLOW

In planning and executing your event, the Board of Directors and Operations Team at the Anusara School of Hatha Yoga (the School) highly recommends that you follow as many of the steps outlined below as fit the size and scope of your event. This will help the School uphold our core value of excellence.

Step #1: Form your Event Organizing Committee

At least 15 months before the event, select the event Organizing Committee and general location. See the Appendix for examples of possible roles for Committee members.

Step #2: Develop your timeline

15 MONTHS BEFORE THE EVENT

- 1) Contact other licensed teachers in your area to ensure coordination. For example, inquire about events they are planning to allow sufficient time between events.
- 2) Select the venue (e.g. school, yoga studio, retreat site, conference center) based on the following considerations:
 - Location
 - Accessibility to public transport
 - Size of the main room
 - Capacity of the room
 - Ambience and alignment with yoga
 - Number of changing rooms and bathrooms
 - Sitting/eating area(s)
 - Restaurants onsite or nearby
 - Supermarkets in the vicinity

- Catering options
 - Cost
 - Deposit required. Tip: Choose a venue where all costs are included in advance
- 3) Choose a date
 - 4) Determine the go/no-go point. This is the point when the final commitment for the venue needs to be made (point where the cancellation fees start to become very large). It is recommended that the Organizing Committee meet one week before the go/no-go point to confirm there is likely to be sufficient attendance.
 - 5) Establish a weekly time for the event organizers to talk or meet up. These check-in calls will help the organizers plan tasks for the coming week and stay current on progress.
 - 6) Determine how you will document your decisions and actions and track your work as a committee. The committee's work plan and related documents can be kept in Google Drive for ease of updating and sharing.
 - 7) Send an email to Ashley Sherburne, the School's Event Producer, at events@anusarayoga.com to announce the name of the event, the venue and the date.

14 MONTHS BEFORE THE EVENT

Calculate the costs and agree on a preliminary budget. This involves:

- Assessing commercial risk (potential losses if the event does not go as planned [Note: The School's Board Treasurer can assist with this.]
- Deciding if it is going to be a for-profit or not-for-profit event.
- Deciding on how to distribute the profit and among whom (Organizing Committee, the School, etc.)
- Consult a local (in-country) accountant about taxes. Determine what taxes are required to be paid. What is required to minimize taxes owed. Decide among the team who is going to pay the taxes and who is going to sign documents.

13 MONTHS BEFORE THE EVENT

- 1) Identify possible teachers and contact them to check their availability.
- 2) Build the event program, including the name of teachers, hours of sessions, and number of breaks,

12 MONTHS BEFORE THE EVENT

Publicize the event through all channels, including email, local websites, the School's website, the School's YouTube channel, Facebook (the School's and local pages), the School's Twitter and Instagram accounts, printed leaflets and word of mouth. Please bear in mind new European Union regulations on data privacy, which stipulate that personal data should be processed in a manner that ensures appropriate security and

confidentiality of the personal data, including prevention of unauthorized access to or use of personal data and the equipment used for processing. In other words, be careful how you use the School's database and your own personal databases/networks.

Remember to use social media in a respectful manner. If you are posting photos or videos, ask the people involved if they want to be part of your marketing efforts. Obtain their written consent and keep it in a safe location.

10 MONTHS BEFORE THE EVENT

Open online registrations. Be aware of privacy regulations:

- Collect only the name of the individual and email or telephone.
- Ask if they wish to be contacted afterwards for other purposes.

3 MONTHS BEFORE THE EVENT

Do your final marketing push. Use as many channels as possible (see those listed above).

Step #3: Decide if you need the School to cover some costs.

Check with the Anusara School of Hatha Yoga's Event Producer to:

- 1) Determine whether you would like assistance from the School's Event Producer in planning, pre-production or on-site production. If so, ask for an estimate of the cost and built that fee into your budget. Each event host negotiates that fee directly with the Event Producer on an event-by-event basis, depending on the host's needs.
- 2) Clarify who (the School or within your local team) is responsible for:
 - a. Marketing (email, social media, printed leaflets, etc.)
 - b. Listing the event on the School's website
 - c. Signing and paying contracts, such as with the venue, a visiting scholar, and/or a catering company
 - d. Handling the finances (who is going to pay the deposit for the venue, handle payments to teachers, etc.)
 - e. Assuming the financial risk
 - f. Agree who will absorb any potential losses of the event (the commercial risk). For workshops, this will typically be the local studio. For regional events, this may be the School.
- 3) Review dates of other known School-sponsored events to avoid overlap before setting the date of your event
- 4) Determine how to keep each other informed as event planning proceeds

As noted below in step #6, the School only requires a share of the profit if the School is assuming the financial risk.

Step #4: Determine the scope of the event and the teacher selection process (if applicable)

- 1) Determine what you want to offer at the event, such as meditation, asana, hiking and *satsang*. You may want to offer kirtan or hire a special performer to add interest to the event.
- 2) Determine how many people you would like to have at your event. Depending on the size and scope of the event, determine the process you will use to select teachers (if applicable).

Step #5: Make reservations and payments

- 1) Negotiate and sign the contract with the venue. (The person who signs the contract was determined in Step #3.) Get in writing exactly what the cost of renting the venue includes.
 - a. Agree with the venue on a cancellation policy.
 - b. Determine the financial terms (i.e. no minimum participant requirement and lenient cancellation policies)
 - c. Clarify if a deposit is required, how much and who will pay it.
 - d. Ask for a written contract.
 - e. Ask when you will get the final invoice.
- 2) Calculate the fees to be paid to teachers (if any).
- 3) Calculate the cost of providing meals. If you engage a catering company, ask for a written contract.
- 4) Get final confirmation from teachers who will be teaching at your event.
- 5) Agree on a cancellation policy (refunds) regarding ticket sales. Here is one example:
 - a. If someone cancels with a specified period [that you determine], their payment will be refunded minus a \$50 administrative fee.
 - b. All funds except for a \$100 administrative fee will be refunded if someone cancels closer to the event if the space is subsequently filled.
 - c. No refunds are given after a certain date.

Step #6: Prepare your event budget

Now you are ready to prepare a detailed budget based on the expected number of attendees. The budget should include all expenses/costs, including but not limited to the cost of the venue, catering, marketing (local and/or through the School) and printed materials, audiovisual, compensation to teachers, and taxes. Include a minimum 10% contingency for unforeseen expenditures.

If you followed the procedure laid out in Step #3, it should now be clear who assumes the financial risk and liabilities of the event (i.e. who will absorb any losses). If the School is responsible for the losses, the following is required:

- 1) Liability insurance (the School may provide this at a cost.)
- 2) A contribution to the School's reserves. This helps the School assume the commercial risk. To determine this contribution, the worst-case cancellation costs will be calculated and agreed on with the School's Operations Team Coordinator. The contribution to the reserves will be 20% of the worst-case cancellation costs.
- 3) Approval of the event budget by the Treasurer of the School's Board of Directors.
 - The budget should indicate if any working capital is required. Ideally, the event should be planned in such way that ticket sales come in well before mayor payments (e.g. the venue) need to be made.
- 4) A monthly financial status update

Additional Considerations

- 1) When determining the price of the ticket (based on projected costs and the estimated number of attendees), decide whether you want to have different ticket prices, depending on when someone buys a ticket. For example, to encourage early enrollment, one event held in the USA in 2017 was priced as follows:
 - a. 4 months before the event: \$575 (note: the price for lodging and food was about \$300)
 - b. 3-4 months before the event: \$650
 - c. Within 2 months of the event: \$750

Note: Organizers of some smaller events have found that no one wanted to pay more than the early bird price. This will vary greatly from country to country. You may also choose to start with an early bird rate and extend this depending on the enrollment.

- 2) It is recommended the fee of the yoga teachers is made contingent on revenue. In other words, teachers are only paid if there is sufficient revenue to cover the other costs.
- 3) Determine whether you will offer a discount to teachers. For example, their event ticket could be waived (they would pay transportation, lodging and food). A typical policy to date is to offer teachers a 50% discount if they teach 1.5 hours or more and a 100% discount if they teach 5 hours or more.
- 4) Determine your policy for offering a discount to volunteers. A typical policy is to offer a 50% discount with 5 or more hours of volunteer time at the event and a 100% discount for 10 or more hours of volunteer time at the event.

Step #7: Determine event pre-production and onsite production plans

Prepare a detailed production plan that includes:

- 1) Audio-visual needs
 - a. Headset microphones (if needed) and batteries
 - b. Handheld microphones (if needed) and batteries
 - c. Pujas (tables, flowers, tablecloth, murti)
 - d. Printed schedule (determine available wall space in each room before you schedule classes in particular rooms)
 - e. Map of the venue
- 2) Determine how many volunteers are needed to staff the event
- 3) Prepare the yoga rooms (puja, props, etc.)
- 4) Prepare your medical first aid kit and emergency numbers
- 5) Distribute materials, announcements, etc.
- 6) Prepare a list of paid attendees or have in a spreadsheet
- 7) Have payment ready for performers (if applicable)
- 8) Have a back-up plan in case a teacher cancels

Step #8: Prepare and implement your event marketing plan

A comprehensive marketing plan includes:

- 1) Use or modification of the School's local and regional event logos
- 2) Seize your marketing capacity: either a local marketing specialist (volunteer or paid) and/or the School's Marketing Specialist (decided in step #3)
- 3) Photos from local teachers (make sure teachers have obtained consent from students for using those materials and clarify the purposes)
- 4) Design and printing of flyers using the School's local/regional event template (which the School's Event Producer can supply)
- 5) Launching an Integrated Marketing Communications strategy (email, social media and YouTube)
- 6) Identifying volunteers to take photos/videos at the event
- 7) Determining what to do with the pictures and videos taken and how to store them safely. Obtain consent and ask participants if those materials could be for future use by local teachers and the School

Continue to market your event via multiple channels (email, social media, YouTube) right up until the day of the event.

Step #9: Hold the event!

All your hard work and planning will pay off!

Here are some important details to remember:

- 1) Communicate to all that pictures or videos will be taken/not taken.
- 2) Ask everyone to complete a written consent form regarding photographs and videos.
- 3) Communicate your intention regarding distribution of photos/videos and say how.
- 4) Reserve an area for those who do not want to be filmed.
- 5) Distribute an evaluation form at the end of the event

Step #10: Close the event

- 1) Make final payments to the venue, teachers and the School (if applicable). If the School is handling payment, note that everyone requiring payment will need to submit an invoice to the School.
- 2) Have an Organizing Committee meeting to evaluate the event. Share with the School's Event Producer any feedback on these guidelines.
- 3) Complete the financial close-out report of the costs and outstanding payments due.
- 4) Distribute any profits according to your plan.

For more information, contact Event Producer Ashley Sherburne at events@anusarayoga.com.

APPENDIX

Possible Roles for Event Planning Committee Members

The following table describes typical roles on a Samavesha Organizing Committee. Depending on the size and scope of your event, you may not need as many roles on your event's Planning Committee.

Title	Role
Chairperson	- Leads regular (weekly) committee meetings.
Secretary	- Takes minutes, maintains action list, prepares agenda for meetings - Prepares a monthly progress report
Program coordinator	- Selects teachers - Develops program - Maintains contact with teachers
Treasurer	- Develops budget - Controls and monitors budget - Prepares financial close-out report
Local coordinator	- Maintains contacts with venue, suppliers and local community - Resolves local issues - Recruits local volunteers - Prepares local financial close -out report
Anusara School of Hatha Yoga's Event Producer	- Handles ticket sales - Handles international Marketing (possibly on collaboration with the School) -Manages Mindbody Online (MBO) - Maintains contact with international participants - Prepares detailed pre-production and onsite production plans - Leads event production on site
Local Event Coordinator	- Manages local sales (if required) - Handles local marketing - Maintains contact with local participants. - Assists event coordinator with production