

CREATING  
*the* MAGIC  
*of a*  
GREAT  
FAIR

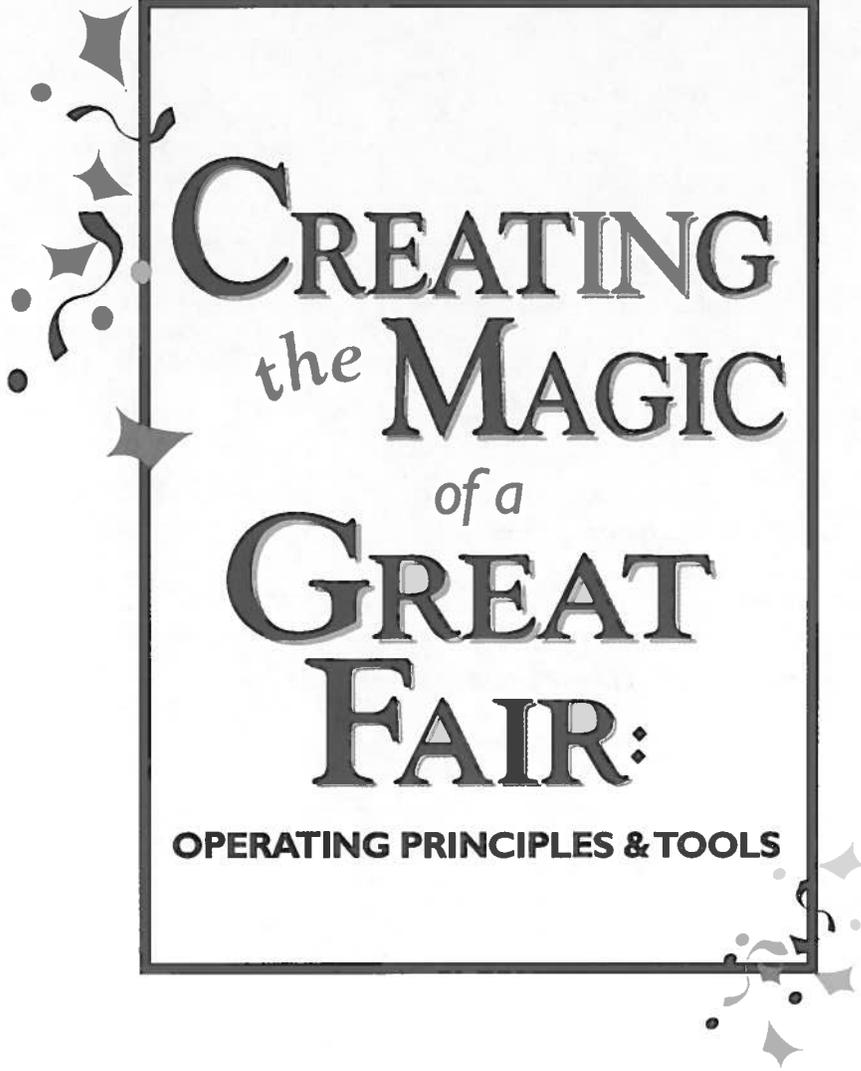




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**C**REATING  
*the* **MAGIC**  
*of a*  
**GREAT**  
**FAIR:**



**OPERATING PRINCIPLES & TOOLS**

Foreword by  
SHARON JENSEN

Published by  
DIVISION OF FAIRS & EXPOSITIONS  
DEPARTMENT OF FOOD AND AGRICULTURE  
STATE OF CALIFORNIA

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## FOREWORD

When California families set out together to attend their local fairs, they are honoring and embodying a tradition that dates back to at least the Middle Ages. In antiquity, the purpose of large gatherings of neighboring and sometimes warring tribes was to conduct trade peaceably and, indirectly, to bring honor to their own cultures and traditions by sharing them with each other. Regardless of dramatic changes that have taken place through the centuries, our behavior as human beings has changed very little since the dawn of civilization. Within California communities today, for example, ethnically defined populations continue to exhibit differing codes of conduct and retain disparate notions of what is sacred.

As much as ever, therefore, we need safe and festive common ground where we can publicly communicate our own individuality and safely scrutinize each other's qualities as well as inherent differences in peaceful gatherings. Local communities need an opportunity to showcase themselves to each other and to see evidence of how their individual experiences add to their whole community's identity and character. In other words, we still need fairs.

But certain forces threaten California fairs' survival – not warring tribes or even competition for the experiences a fair can produce, but instead the rather tame stuff of dwindling funds in the public purse. It would be an embarrassing failure of imagination and spirit for our generation of the California family to be the one that lets the unique magic of fairs dim into a thin memory only because we ran out of money.

As a result of reading *Creating the Magic of a Great Fair: Operating Principles & Tools*, I am bolstered by the potential of a bright and exciting renaissance for fairs in California. My own experience as a former California fair CEO is strongly affirmed in these pages. I recognize both the simplicity of the ideas put forward and the difficulty and challenges posed by their implementation. I also recognize the enormous rewards to be gained from putting these ideas into action, whether fair organizations are already utilizing them or begin to as a result of reading this book. Every job has the potential to generate personal fulfillment, but nothing in my experience has exceeded the satisfaction of playing a fundamental role in generating a spirit of community pride and unity.

*Creating the Magic of a Great Fair* declares that the public purpose of fairs today is to celebrate local community identity and character. This purpose is as important now as it has ever been. Over the next decade, with an enormous amount of courage, inventiveness, and perseverance, some very interesting things could happen in the world of fairs. My hope is that this book will be a catalyst to spur discussion and an inspiration to individuals and communities interested in shouldering the effort to ensure that the powerful magic of fairs survives and flourishes.

Sharon Jensen  
Director, Division of Fairs & Expositions  
California Department of Food and Agriculture



## PREFACE

In 1994, the California Department of Food and Agriculture's Division of Fairs & Expositions initiated a research and demonstration project to explore options available to California's network of fair organizations in the face of declining public funding, increasing facility development and maintenance needs, and a steady erosion of the percentage of Californians who are annual fairgoers.

From among a diverse network of 54 district agricultural associations, 24 county fairs, two citrus fruit fairs, and the state fair, two pilot sites served as the primary research subjects of *California Fairs Face Change Head-on: the Reinvention Project*. The El Dorado County Fair in Placerville and the California Mid-Winter Fair & Fiesta in Imperial participated for the full three years of the project. Much was learned from interaction with these two sites, and *Creating the Magic of a Great Fair: Operating Principles & Tools* presents that information in ways designed to allow other fair organizations to recognize what might apply to their own experiences or goals. Examples from these two sites are included throughout Part Two, and the specific presenting issue at each site is examined via two case studies in Part Three.

*Creating the Magic of a Great Fair* is a synthesis of findings, recommendations, and tools for the benefit of fair organizations. Additionally, opportunities are presented for state government and local communities to support fairs' long-term success. These offerings are derived from reinvention project research and strengthened by the diversity of our own fair experience and exposure.

We encourage you to give close attention to what you read here and to approach reinvention with a willingness to expand the benefits your fair organization creates for your community.



## ACKNOWLEDGEMENTS

First and foremost, the Division of Fairs & Expositions applauds all Californians who love their community fair and do their part to make it happen every year. They hold the candle in the window. Time and again, their enthusiasm and affection for these community events provided the impetus to continue the reinvention project's sometimes circuitous search for the source of fairs' vitality.

*California Fairs Face Change Head-on: the Reinvention Project* benefited from the participation of four pilot sites, but this book is largely a report of activities in the three-year study of two sites in particular: El Dorado County Fair and the Imperial Valley Expo (45<sup>th</sup> District Agricultural Association). To the community members, staff, and boards of each, Fairs & Expositions offers thanks and admiration for their generosity, commitment, and patience. Special thanks go to the CEOs and board liaisons: Susan Clark and Rod Palmieri from the El Dorado County Fair and Maxine Killian, Dimitra Smith, and Patty McGrew from the Imperial Valley Expo.

Fairs & Expositions extends grateful acknowledgement as well to the community, staff, and boards of the Napa Valley Expo (25<sup>th</sup> District Agricultural Association) and the Monterey County Fair (7<sup>th</sup> District Agricultural Association) for their contributions to the project and their commitment to change. Dorothy Lind (CEO of the Napa Valley Expo) in particular was an inspiration. The model she has created for a fair organization's participation in the community leadership structure is invaluable.

In addition, Fairs & Expositions extends special thanks to the project's Selection and Steering Committee: Stevan Allen, Norb Bartosik, Karen Bennett, John Kreidler, Michael O'Hare, Donald Wallrich, and special advisor Andy Dolich. Their wise counsel and well-considered insights helped the project "stay the course."

And, among countless others to whom Fairs & Expositions owes sincere thanks for their contributions, a few individuals deserve special commendation:

The reinvention project core team – Deanna Marquart, Phoebe Stolfi, and Susan Travers – for their faithful dedication to meeting a difficult challenge and especially for their efforts in producing this book.

Matt Etzler, for being a step ahead in developing forerunners of some of the tools included in this book.

April Geary, for bringing her remarkable editorial and communications marketing skills to bear at just the right time.

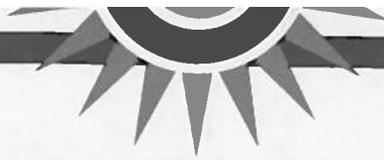
Louis Patler, for his prodigious creation of enduring phrases and his early participation as a member of the core team.

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PART ONE:

**BACKGROUND**





# ORIGIN OF FAIRS

## FROM THE DAWN OF CIVILIZATION

The complex genealogy of fairs is linked to no less than the beginnings of human civilization. Fairs have ancient ties to traveling caravans of merchants and entertainers, the season of the harvest, and religious worship and feasting. In the early stages of civilization, when the population was scattered with only primitive means of transportation and communication, the way stations of travelling caravans served as important venues for commerce and entertainment. Caravans traveled over prescribed routes that would enable them to arrive during periods of harvest and other special gatherings. Wherever they stopped, otherwise warring neighbors would suspend their hostilities for the duration of the caravan's visit in order to conduct trade.

The etymology of the word "fair" derives from the Latin *feriae*, meaning days of holiday, rest, and feasting. The etymology of the word "holiday," is a contracted form of "holy" and "day." In ancient Greece, India, and Asia, events that drew large numbers of people for religious ceremonies were also occasions that attracted vendors of food, toys, ornaments, and religious emblems, as well as acrobats, actors, clowns, and musicians. In Mecca, there still exists a fair that is intimately related to the well-known religious pilgrimage. It even still includes a caravan of traders.

## IMPACT OF THE INDUSTRIAL REVOLUTION

During the 18<sup>th</sup> century, the impact of the industrial revolution was as great in agriculture as in manufacturing. Significant changes came about in both the machinery and methods for food production. Instead of simply providing supplies of food and clothing for self-contained feudal villages, agriculture developed into a commercial occupation that could produce enough food to supply entire nations. This transition necessitated not only increasing the yield but also improving the quality of agricultural products to meet the demands of a changing social and economic order.

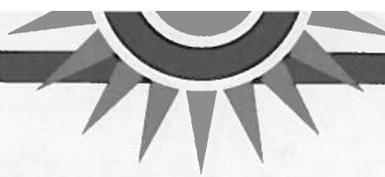
The evolution of fairs that combined religious, commercial, and entertainment activities into a single festival emphasizing agricultural education and exhibits began in 18<sup>th</sup> century England. Landowners, recognizing potential for higher profits, established agricultural societies and began holding cattle shows and farm demonstrations to popularize new breeds of livestock and explain new methods of cultivation during the annual harvest celebration.

## RISE OF THE AMERICAN AGRICULTURAL FAIR

In the United States, Elkanah Watson is widely regarded as the progenitor of the American agricultural fair. Watson founded the Berkshire Agricultural Society in the Commonwealth of Massachusetts in 1810 and, at its second annual meeting, the Society offered prizes in a competitive display of livestock.

The following year, prizes and certificates for excellence were awarded for livestock, field and orchard crops, and articles of domestic manufacture. Other major attractions were a plowing contest, demonstrations of spinning, and a parade with a marching band. The Berkshire fair intended to enhance agricultural production methods by recognizing the best farm products and handiwork in a region. Commerce, competition, and celebration became the basic ingredients of this popular event and every American fair to follow.





## GOVERNMENT INVOLVEMENT

The popularity of the Berkshire fair grew, especially with annual increases in premiums<sup>1</sup> and with the addition in 1814 of a Grand Agricultural Ball. By 1816, the premiums exceeded what Watson could raise privately and, in 1817, he applied for and received from the Commonwealth of Massachusetts a \$200 state subsidy. Two years later, the legislatures of New York and New Hampshire also enacted general subsidy laws to fund premiums awarded at fairs in those states.

Thereafter, adoption of the Berkshire model for fairs spread quickly throughout the nation. In 1850, there were 912 county and state agricultural societies that sponsored annual fairs. By 1913, the U.S. Department of Agriculture counted 2,740 such societies.

In California, the history of government involvement in fairs and expositions dates back to 1854 when the legislature created the California State Agricultural Society to hold an exhibition of livestock, manufactures, and production. A major reorganization took place in 1929 when the Department of Finance took over the powers and duties of the Board of Agriculture, which the legislature had created in 1863 to administer the business activity of the Society, and established in its place a Division of Exhibits. This reorganized Division of Exhibits coordinated and administered the “state rules” for exhibiting at fairs. A 1941 law changed the name of the agency to the Division of Fairs & Exhibitions. By 1963, the legislature transferred the division to the California Department of Food and Agriculture. Today, this division is known as Fairs & Expositions.

## HORSE RACING AT CALIFORNIA FAIRS

Fairs have been an integral part of the horse racing industry in California since the 1860s when organized racing began at fairs. Following the Great Depression, fairs’ need for state revenues made parimutuel betting palatable, politically and socially, further deepening the bond between fairs and horse racing. The California Horse Racing Act of 1933 – ratified two-to-one by referendum of the electorate – legalized parimutuel betting on horse racing and established a special account for continuous state funding of fairs from a portion of betting receipts.

California horse racing changed forever in the 1980s with passage of legislation that authorized construction of satellite wagering facilities (SWFs) on fairgrounds. The northern and southern California networks of these facilities provide simulcast signals from all of California’s private as well as fair racetracks. Statewide, fair organizations operate 23 full-service SWFs and, at present, three special occasion wagering centers.



## DEVELOPMENT OF THE CALIFORNIA NETWORK OF FAIRS

The first six fairs in California were established during the 19<sup>th</sup> century before the Civil War. Their mission was to advance public knowledge of agriculture and to provide facilities for community gatherings timed to coincide with the seasonal rhythms of agriculture. Fairs were generally once-a-year events, operated mostly by volunteers.

Toward the end of the 19<sup>th</sup> century, California followed the lead of other states by sanctioning the creation of agricultural societies for the purpose of conducting annual fairs or expositions. California laws passed in that era authorized formation of district agricultural associations (DAAs) wherever 50 or more citizens in a specific locale organized for this purpose and had the support of their local legislator.

Six DAAs had formed prior to 1933. Within 10 years of passage of the 1933 California Horse Racing Act, another 48 had been established. Until the 1940s, fairs were still mostly volunteer operated.

Today, the network of California fair organizations includes 80 local fair organizations and the state fair. Of the 80 local organizations, there are still 54 DAAs, which are state institutions. In addition, there are 24 county fairs and two citrus fruit fairs (a special designation in state law). In aggregate, the network annually supports as many as 30,000 full-time positions and generates an estimated \$1.6 billion in economic impact.

## CALIFORNIA FAIRGROUNDS

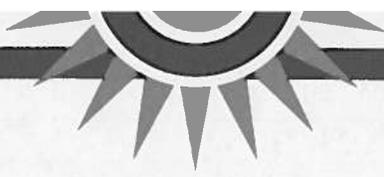
Throughout the 1940s, the federal Work Projects Administration and the California Conservation Corps were primarily responsible for the initial development of fairgrounds. These agencies constructed more than 3,000 structures to house annual fair events, which at that time emphasized agricultural activities almost exclusively (especially 4-H and FFA shows).

The inventory of fairgrounds in California (county-owned, privately held, and state-owned) includes more than 3,000 buildings on nearly 5,500 acres at locations throughout the state. Current market estimates of California's fairground property indicate the aggregate value of real estate and improvements may be as high as \$1 billion.

For nearly thirty years, year-round use of fairgrounds has been increasing dramatically. In addition to satellite wagering facilities, fairgrounds provide space for private events, public or community events, exhibitions and trade shows, and emergency services staging grounds and evacuation centers. Particularly in rural communities, a fairground is the central activity site and the fair event serves as the annual gathering. This unique community-based identity sets fairs apart from the myriad other events and attractions available to consumers and enables fair organizations to touch the lives of people residing in their immediate market areas 12 months a year.

**Note:**

<sup>1</sup> Premiums are cash awards presented to exhibitors; the amounts are not standardized but rather vary from one fair organization to another.





## TODAY'S OPERATING ENVIRONMENT

California's cultural and economic landscape has changed dramatically in the last several decades. In many ways, and because of many factors, fairs have not kept pace with this change. Being behind the curve presents a daunting challenge to the network of California fair organizations.

### FAIR ATTENDANCE AND REVENUES

In 1956, there were 13.6 million Californians; in 1997 there were 33.2 million. In 1956, an estimated 6 million people attended fairs – 44 percent of the state population. In 1997, there were an estimated 10 million fairgoers – only 30 percent of the state population. While the population increased by 144 percent, the number of fairgoers rose by only 67 percent. This difference represents a significant decline in market share.

Fair organization revenues have risen in the past two decades primarily as a result of increases in year-round fairground use, annual fair admissions and parking fees, booth space rental fees, and percentages of vendor sales (food, retail goods, and attractions). In other words, fair organizations have become more adept at increasing their revenue but not necessarily at keeping pace with the market.

### COMPETITION

While fair organizations have been resisting the reality of new competition, elements of a fair that appeal to the mass market have been introduced in more innovative forms and accessible locations by non-fair organizations. In effect, much of what was once unique to the annual fair is now commonplace and accessible on a daily basis in non-fair venues. Theme parks, shopping malls, and fast food franchises share a common origin: each was incubated on the county and state fair circuit.

In the nonprofit sector, zoos and museums are creating unique, interactive educational exhibits aimed at family and youth markets. Themed festivals have been growing at a rapid pace, and many market-driven vendors have fled the fair circuit in favor of festivals' more definitive demographics and less stringently regulated business environment. In short, identifying a unique and sustainable role in this new marketplace is a matter of survival for fairs.

### URBANIZATION AND DIVERSITY

Had a leader from a non-agricultural industry created a linkage to fairs before Elkanah Watson, the evolution of fairs in America would probably have reflected America's escalating urbanization long before now. In this sense, it is merely historical accident that fairs became so strongly associated with agriculture that, two centuries later, people still expect to see cows when they attend a fair.

There is no question that the fair industry owes a great deal to the past contributions of agriculture. Yet the current identification of fairs with agriculture is ironic, given the decreasing importance of fairs in the marketing strategies for modern agriculture. Consistent with the corporatization of farming, the agricultural industry on the verge of the 21<sup>st</sup> century competes in the global marketplace, not on the county fairground. Despite this reality, much of today's fair programming still cleaves to traditions that would appeal primarily to an agrarian population, presenting a nostalgic image that harkens back to the 19<sup>th</sup> century.



Throughout the 20<sup>th</sup> century, advances in agricultural production technology have increased farm productivity to such an extent that farming now employs far fewer people to produce far greater abundance. With less than one percent of California's 33 million people engaged in farming and ranching, each agricultural worker today provides food for more than 100 other people, compared to just 13 other people in 1947. Although agriculture continues to be California's largest industry in terms of sales, a rapidly increasing non-farm population has spread out over the state, converting millions of acres of farmland to towns and housing developments. For most Californians, family farming is a way of life that is gone forever.

Californians today are irrefutably urban. Furthermore, their cultural experiences are increasingly far removed from the agrarian culture of 19th century America. Always a magnet to the world's emigrants, California is now home to an increasingly diverse and multicultural mix of people. In Los Angeles alone, school children are native speakers of more than 100 different languages. The U.S. Bureau of the Census projects that by the year 2005 California will become the first state in the nation with a non-white majority population.

The degree to which California has become more urban and its population more culturally diverse is significant for the future of fairs. As the agrarian way of life increasingly lives on only in memory, Californians who lack familial or cultural ties to that way of life will steadily lose interest in fairs except as nostalgic returns to the past. Fairs need to reflect the current identity and character of society if all aspects of their programming are to be relevant to the life experiences of modern Californians.

## **CONDITION OF FAIRGROUNDS**

Aging facilities on fairgrounds often fall below aesthetic and operational standards acceptable for public venues. Most of the facilities were built over 50 years ago with the intention that they would be used one week of the year. Given the current usage and demand, these facilities increasingly fail to meet today's year-round renters' requirements. Even so, the total current market value of fairground property throughout California is estimated to be approximately \$1 billion.

The state currently reinvests as much as \$5 million annually and fair organizations contribute another \$4 million annually for fairground maintenance and health and safety projects. The private industry standard is to reinvest approximately 3 percent of value into annual facility repair, maintenance, and upgrading. Applying this standard to fairgrounds would mean that California is annually under-investing in the infrastructure of fairs by approximately \$21 million.

## **DEPENDENCE ON HORSE RACING REVENUES**

Dependence on revenues from horse racing is a troubling prospect. The state of California first began to distribute horse racing funds for operational expenses and facility improvements of fairgrounds in 1933. Until the early 1980s, most fair organizations received the same annual allocation. When they fell short of budget at the end of the year, or a worthy but unbudgeted project presented itself, fair organizations could request additional monies from horse racing revenues administered by Fairs & Expositions.



Early in the 1990s, a fiscal crisis in state government led to a transfer of special fund monies into the general fund. The governor and legislature used otherwise protected funds, including horse racing revenues, to compensate for California's general tax shortfall. With discretionary authority approved in the Budget Act, Fairs & Expositions responded to the reduction in funds by standardizing allocations on the basis of fair classification. The result was that the smallest fair organizations, those in Class I, received the largest annual allocations of horse racing revenues (\$140,000), and the largest fair organizations received the smallest allocations (\$30,000). An indicator of smaller fairs' dependence on this revenue source is that the allocation for Class I fair organizations represents up to 70 percent of total budget. For the largest fairs, the \$30,000 allocation represents less than 1 percent of total budget.

The popularity of horse racing as a betting sport has been on the decline for decades. Unless this trend is reversed, the amount of funding available for allocation to fair organizations will also eventually decline. Even if that potentiality can be forestalled, the likelihood that the fund will grow to keep pace with inflation is remote at best.

## **BUREAUCRACY**

Fair organizations operate in a top-down, centralized bureaucratic policymaking structure. Fifty-four of the 81 fair organizations in California are DAAs and, as such, are state institutions. When DAAs were volunteer-run organizations that facilitated the community fair once a year, this status offered nothing but benefit in terms of tax and regulation exemptions. Today, being a state institution carries with it the burden of increased bureaucracy that often poses barriers to efficiency. For example: the State Personnel Board and Department of Personnel Administration define DAA job classifications, recruit employment candidates, and set salaries, benefits, and vacation allotments; and Fairs & Expositions approves budgets, contracts, and purchasing orders. The costs and delays imposed by these oversight functions can substantially reduce profitability at the local DAA level.

Today's fair organizations need to promote facilities and events, sell event sponsorships, engage in proactive community relations, and design innovative event programming. These mission-critical responsibilities have inadequate precedents in state service. The job classifications and salary ranges available to DAAs for these mission-critical functions are poorly conceived for attracting the most qualified candidates. The current civil service requirements related to staffing patterns, pay scales, and employee benefits may make fair organizations attractive as workplaces, but they dramatically reduce fair organizations' financial and organizational flexibility to adjust staffing levels as needed.

In a modern marketplace that requires quick-footed, entrepreneurial decision-making, stifling bureaucratic structures impede success. Fairs will need greater freedom if they are to regain the advantages that accrue to unshackled upstarts and if, with those advantages, they are to prevail in California's fiercely competitive marketplace.





## FACING CHANGE: THE REINVENTION PROJECT

In December 1991, then-Secretary of Food and Agriculture Henry J. Voss appointed a blue ribbon committee to study the future of the fair industry in California. In January 1993, the Voss Committee issued its report, *California Fairs Facing Change: Opportunities for Success*. The blue ribbon committee's findings and recommendations were based on a year-long process that included site visits, meetings with interested parties, extensive data analysis, and spirited deliberation.

By implication, the recommendations contained in *California Fairs Facing Change* indicate the Voss Committee believed that ensuring a bright future for fairs would depend primarily on the commitment and ability of fair organizations to make two types of change. *First*, fair organizations need to reach a deeper and more modern understanding of why fairs exist and of the basis for their enduring appeal. *Second*, and equally important, fair organizations need to define and utilize best practices in management, marketing, and customer service.

The following is a summary of the Voss Committee's recommendations:

- Clarify the mission of fairs.
- Meet community needs.
- Measure, document, and publicize fairs' social impact.
- Expand and diversify revenue.
- Organize joint marketing, sponsorship, and promotional programs.
- Institute standard business and marketing practices.
- Learn from each other by applying successful program and management innovations.
- Recruit volunteer assistance from business and the professions.
- Improve relations with regulatory agencies.
- Segregate, clarify, and strengthen the respective roles of boards and managers.
- Design and implement market research initiatives to provide the foundation for planning program changes and innovations.

### THE REINVENTION PROJECT

The Division of Fairs & Expositions recognized that fairs, as they currently exist, command the loyalty and support of a base of patrons. To expand that base, in August 1994, Fairs & Expositions initiated a research and demonstration "reinvention" project to fuel the momentum that started with the Voss Committee's recommendation to pursue innovation. Fairs & Expositions christened the project *California Fairs Face Change Head-on: the Reinvention Project*, in reference to the title of the Voss Committee's report.

The mission of the reinvention project was to "make a difference for fairs," and the strategy was to:

- Identify and interpret business systems and strategies for use at fairs.
- Invite and interpret outsiders' insights.
- Contemporize the mission and purpose of fair organizations.
- Distill, synthesize, and distribute the findings.

## WHY “REINVENTION?”

In 1993, David Osborne and Ted Gaebler published their book, *Reinventing Government*. This national bestseller took government by storm, entering the new term “reinvention” into the vocabulary of the organizational development community to describe the process of redesigning the way organizations serve their purpose. In the specific case of Fairs & Expositions’ reinvention project, the goal of reinvention was to define the public purpose of fairs so that future decisions about funding, programming, and state oversight would reflect a shared understanding.

## THE PILOT SITES

By December 1994, in consultation with a project steering committee appointed by then-Secretary Voss, Fairs & Expositions selected three pilot sites for reinvention: California Mid-Winter Fair in Imperial (45<sup>th</sup> District Agricultural Association), El Dorado County Fair in Placerville, and Monterey County Fair (7<sup>th</sup> District Agricultural Association) in Monterey. After Fairs & Expositions suspended the Monterey County Fair from the project so the fair organization could tend to a financial crisis, Secretary Voss invited the Napa Valley Expo (25<sup>th</sup> District Agricultural Association) to participate in reinvention as an honorary and model pilot site. The Napa fair organization later left reinvention to participate in Fairs & Expositions’ transition project, which would evaluate options open to DAAs for restructuring outside state government. (See table on pg. 11.)

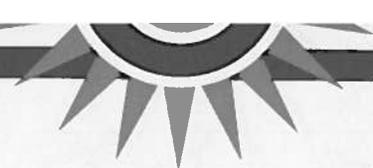
## REINVENTION PROJECT METHODOLOGY

Reinvention was new territory – a blank slate. The previous approach to encouraging improvement in fair programming and management had been to support activities in which all fair organization CEOs and/or staff and board members had opportunities to participate – primarily programs and training sessions offered at annual conferences and conventions. In the reinvention project, Fairs & Expositions departed from this approach and initiated a series of innovations designed to enable a reinvention project team of Fairs & Expositions staff and core consultants to learn from assessment and development activities at a small number of fair organizations. The effect was twofold:

- Special projects with various consultants produced new “intellectual capital” about the nature, opportunities, and challenges of California’s fairs as community institutions and businesses.
- Interviews with pilot-site stakeholders revealed and conclusively confirmed the enduring importance and meaning of fairs.

## PILOT SITES OVERVIEW

FAIR ORGANIZATION	El Dorado County Fair PLACERVILLE	California Mid-Winter Fair (45 <sup>th</sup> DAA) IMPERIAL	Napa Town & Country Fair (25 <sup>th</sup> DAA) NAPA	Monterey County Fair (7 <sup>th</sup> DAA) MONTEREY
DATES OF PARTICIPATION	Dec 94 - Dec 97	Dec 94 - Dec 97	Feb 95 - July 96	Dec 94 - Jan 95
PRESENTING ISSUE(S)	<ul style="list-style-type: none"> <li>• Relocation</li> </ul>	<ul style="list-style-type: none"> <li>• NAFTA-related opportunities</li> <li>• Multiculturalism</li> </ul>	<ul style="list-style-type: none"> <li>• No proposal submitted</li> </ul>	<ul style="list-style-type: none"> <li>• Relocation</li> </ul>
SPECIAL STUDIES	<ul style="list-style-type: none"> <li>• Relocation feasibility study</li> <li>• "Blank slate" site redesign</li> <li>• Opportunities for revenue enhancement</li> <li>• Marketing research</li> <li>• Advertising and promotion</li> </ul>	<ul style="list-style-type: none"> <li>• Opportunities posed by adoption of the North American Free Trade Agreement (NAFTA)</li> <li>• Building alliances with community, creating a Latino-friendly fair</li> <li>• Corporate identity</li> <li>• Master site planning</li> <li>• Interim rentals</li> <li>• Concessionaire relationship-building</li> </ul>	<ul style="list-style-type: none"> <li>• Site redesign</li> <li>• Community leadership</li> <li>• Grant-writing</li> <li>• Real estate review</li> <li>• Market research collaboration with local partners</li> </ul>	
OUTCOMES	<p>In December 1995, based on the relocation feasibility study, the fair board ended 15 years of deliberation regarding whether to relocate and made a commitment to stay at the current site. The reinvention project then helped the fair organization identify new revenue streams, including new fairgoers to target, and new uses and layout of the current fairground.</p>	<p>In April 1996, the NAFTA study concluded that the fairground was an ideal location for an international trade and convention center. However, other studies revealed that the fair organization was not ready to tackle this development plan until it fulfilled (exceptionally well) its clearest purpose -- to produce the annual fair. In years 1996 and 1997, the fair organization focused on developing local relationships, marketing a new identity, and building a broader-based multicultural appeal for the annual fair.</p>	<p>Deemed an honorary pilot site by Secretary Voss in 1994, the fair organization provided a model of reinvention to the project team and other pilot sites. Napa ended this role in 1996 to participate in Fairs &amp; Expositions' transition project, which explored options for transitioning to a non-state governance structure. In 1998, this effort culminated in Governor Wilson's signing of SB 1436 (Mike Thompson), which authorized a new and locally controlled governance structure.</p>	<p>Fairs &amp; Expositions suspended Monterey's pilot status when the initial assessment process uncovered a financial crisis. Today, the Monterey County Fair is recovering with a cash reserve in excess of 16 percent.</p>



### Creating new “intellectual capital”

An idea always precedes an organization, business, new program or activity. Conducting research and development projects is a time-tested method of generating new ideas and new applications of old ideas. In this conceptualization, ideas serve as currency. Ideas are spent in exchange for improvements. The improvements may be greater operational efficiency, success in business, or a higher quality of public life – among many other possibilities. This way of thinking about ideas is a form of building and using “intellectual capital.” Reinvention was a research and development project to create new intellectual capital as a resource for producing improvements in annual fairs, fairgrounds, and fair organizations.

#### Spider’s webs

In spider’s webs, a few experts team up to meet a specific challenge and then disband immediately upon completing their mission. Spider’s webs are appropriate when the knowledge required to solve a complex problem is dispersed among many specialists. The power of such interconnections is so great that even with a modest number of collaborating independent professionals (8 to 10), a spider’s web can leverage knowledge capabilities by hundreds of times.

Source: “Managing Professional Intellect,” *Harvard Business Review* (March/April 1996).

### Fairtime Consulting Studies

Using a concept similar to one that *Harvard Business Review* referred to as “spider’s webs” (see box), Fairs & Expositions assembled two teams of outside experts (with some members overlapping) to attend and observe the annual fair at the pilot sites: Imperial in March 1996 and El Dorado in August 1996. All of the participating consultants wrote their own individual papers to report their observations and recommendations. Fairs & Expositions refers to these papers collectively as the “fairtime consulting studies.” Clarity and consistency in outsiders’ observations regarding fairs make the fairtime consulting studies a fundamental source of new intellectual capital – insight into the purpose of fairs and prospects for improvement of the annual fair.

### Other Studies

In addition to retaining consultants for the fairtime studies, Fairs & Expositions commissioned several studies related to issues that were specific to one or more pilot sites. The case studies, checklists, and tools included in this book are examples of the intellectual capital created from the many projects and activities of the reinvention project.

### Stakeholder interviews – another form of intellectual capital

Working in tandem with outside experts, the reinvention project team produced assessment reports on each pilot site, providing yet another form of intellectual capital. These reports addressed the functional capacity of each fair organization in such areas as community relations, financial management, and board development.

The information sources for organizational assessments included:

- Review of financial systems and records.
- Meetings of the reinvention team on retreat with the CEO and board members.
- Interviews with fair organization staff and board members, individuals in the community with ties to the fair, and local government and business leaders.

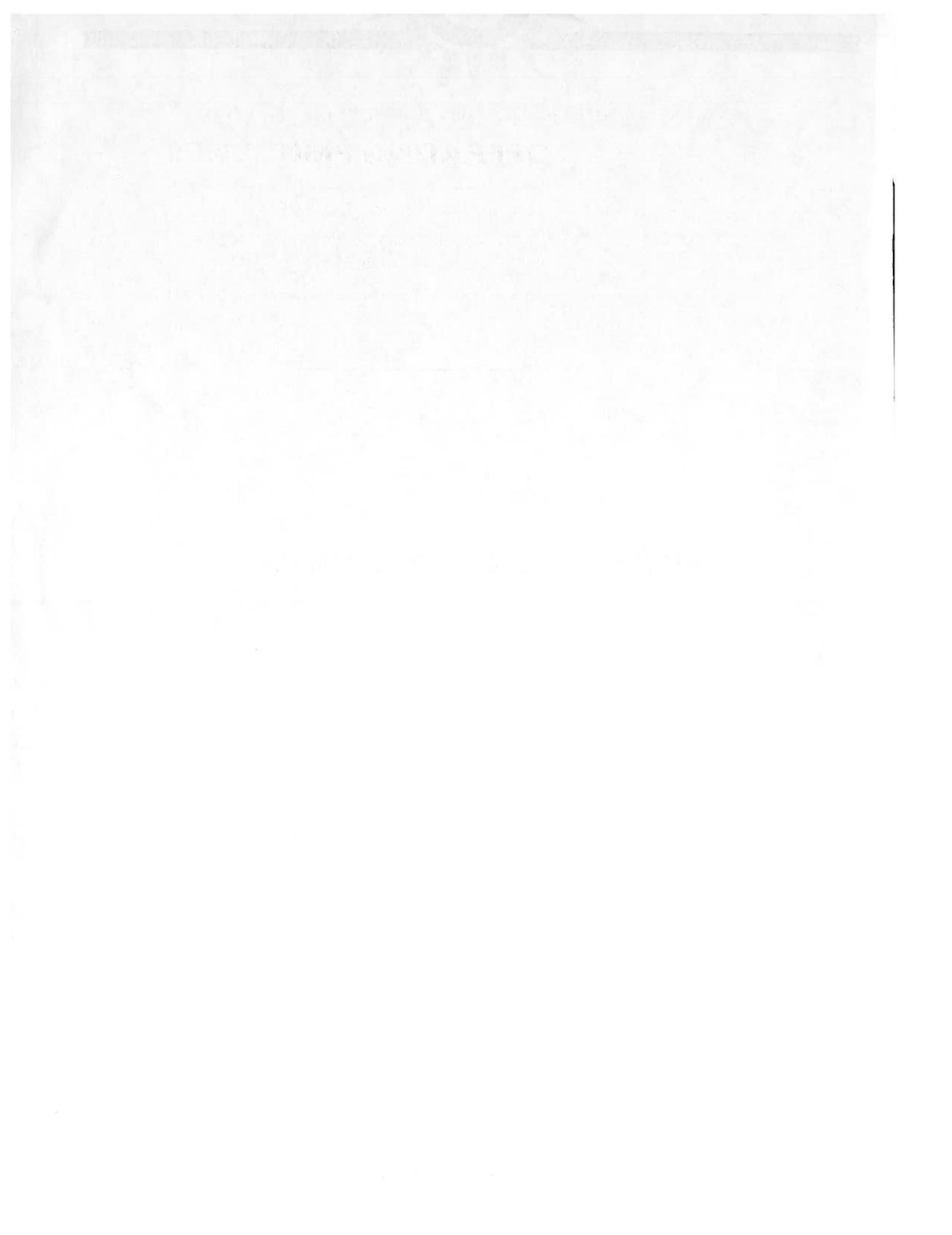
The reinvention project team relied on interviewing as a primary method of obtaining information. Interviewees included everyone immediately involved in each pilot fair organization, as well as many concessionaires, volunteers, exhibitors, community leaders, and even fairgoers. To a great extent, the reinvention team’s understanding of the role that fairs play in the lives of their communities comes from this rich source of diverse perspectives.





**PART TWO:**  
**FINDINGS & OPPORTUNITIES**







## REINVENTING THE ANNUAL FAIR: THREE BASIC OPERATING PRINCIPLES

### THREE BASIC OPERATING PRINCIPLES OF THE REINVENTED FAIR

1. The public purpose of the annual fair is to provide structure and opportunity for people of a community to celebrate the local identity and character of their community.
2. The primary goal of fair organizations is to mobilize the community to produce a great fair.
3. The business of fair organizations is to broker opportunities to reach the market made up of fairgoers.

The reinvention project arrived at three basic operating principles that define the nature and purpose of the annual fair. They represent a distillation of the best insights the project team and consultants encountered in their interactions with fair organizations and their stakeholders. Those committed to reversing the declining fortunes of California's annual fairs are invited to regard these operating principles as a frame of reference and make a concerted effort to use them as a guide for developing and executing plans of action aimed at revitalizing fairs.

This chapter spells out the rationale behind the basic operating principles and expands on their meaning and importance. Each of the succeeding three chapters is devoted to one of the three operating principles and offers ideas designed to facilitate putting these operating principles into practice. These ideas derive from reports of project team members about the pilot sites, interviews with community stakeholders, and reports written by consultants who conducted special reinvention projects. They serve as starting points for spurring community discussion about the actions fair organizations can take to reinvent their annual fair. Chapter eight outlines opportunities for state government and local entities to participate in the reinvention and revitalization of fairs. Chapter nine provides a description of new directions for the Division of Fairs & Expositions, based on findings from the reinvention project.

### ONE: FAIRS HAVE A PUBLIC PURPOSE

The reinvention project has asked from its inception, *Why is state government in the fair business? Should it be?* At bottom, these questions address the issue of whether fairs have a public purpose. There is a very strong case that they do. In fact, this purpose represents the first basic operating principle of the reinvented fair.

*The public purpose of the annual fair is to provide structure and opportunity for people of a particular community to celebrate the local identity and character of their community.*

Cultural anthropologists have said that for a community to remain healthy, members of the community must collectively imagine what holds them together, as against the many conflicting interests that pull them apart. By celebrating shared values and interests and shifting people's focus away from inward insularity in favor of a broad appreciation of all that their community has to offer, the fair becomes a source of community pride that forges common identity and loyalties among seemingly disparate peoples. In other words, fairs expand common ground. As was true of the earliest organized fairs and festivals, when people attend modern-day fairs, they suspend their individual biases and hostilities and adopt a shared code of behavior within the limited time frame of the fair and defined parameters of the fairground. In this way, fairs play a role in creating and preserving social stability, allowing bonds to develop between community members who come from diverse ethnic, cultural, and religious backgrounds.



Although local residents may develop mutual relationships simply by living in proximity, these relationships are often tenuous and sporadic. A fair, however, is a consciously designed event that aims to create a mutual appreciation and understanding among people in a given place and time. If social stability, civic peace, and public safety increase as a result of community celebrations that enhance neighborliness and expand common ground, then these are public goods that make it both rational and wise for government to support.

## **TWO: THE GOAL IS TO MOBILIZE THE COMMUNITY TO PRODUCE A GREAT FAIR**

Over the past few decades, several factors have driven fair organizations to focus on the pursuit of financial self-sufficiency as their primary task. These factors include but are not limited to statutory authorization for multipurpose use of fairgrounds, a decline in public funding, and increasing costs for personnel and facility maintenance in connection with supporting year-round operations.

While these factors are important, the narrow pursuit of financial self-sufficiency often seems to have resulted in what organizational theorists call “goal displacement.” Goal displacement means that an organization begins to engage in activities that are different from the ones it was created to undertake and which take it far afield from its original reason for being. When the primary goal becomes the generation of new revenue, fair organizations may falter in their production of the fair unless these new activities are compatible with and draw on the same set of characteristics and capacities that gave fairs a rationale and made them popular events in the first place.

*The primary goal of fair organizations is to mobilize the community to produce a great fair.*

To avoid misunderstanding: there is no question that fairs need to develop a solid financial foundation. The point is that pursuit of financial self-sufficiency should be compatible with mobilization of the community to produce a great fair. Meeting this broader standard will eliminate the pitfall of entering into business relationships or enterprises that lack the potential to improve the quality of the fair.

The principle that the primary goal of fair organizations is to mobilize the community to produce a great fair is connected with the first principle, namely, that fairs have a public purpose to give people an opportunity to celebrate the uniqueness of their community. Above all, a great fair is one that so effectively expresses the identity and character of the local community that large numbers of people in the community will want to attend and participate for fear of missing something wonderful if they do not. At the same time, it suggests that fair organizations need to select an underlying business activity that is compatible with and promotes the goal of producing a great fair. This leads to the third principle.

## **THREE: FAIR ORGANIZATIONS ARE IN THE BUSINESS OF OPPORTUNITY BROKERING**

Community members at pilot sites repeatedly confirmed the relevance of fairs and fairgrounds as valued resources and assets. But many were confused about their local fair organizations' mission, purpose, and vision. As the reinvention project team observed and analyzed the activities of the pilot sites, a new definition of their key business activity emerged.

*The business of fair organizations is to broker opportunities to reach the market made up of fairgoers.*



The logic behind this principle is simple: for the fair itself to be a financial success, a fair organization has to create opportunities for *other* entities to enjoy financial success. The shopping center provides an analogy that illustrates the kind of business activity that defines fair organizations. A shopping center landlord is also in the business of opportunity brokering. He or she is the broker between buyers (consumers who potentially will make purchases at the shopping center) and sellers (merchants who potentially will want to rent retail space at the shopping center). The relevance of this analogy is not surprising, because fairs were the precursors of shopping centers.

The shopping center landlord's brokering function has two aspects. One is to inform potential shoppers of what they will find at the mall – the stores, foods, and bargains that are available. The other aspect is to make sure that those businesses that rent space in the mall offer goods and services the landlord has reason to believe shoppers want to buy. By attracting a large enough customer base to make all those businesses profitable, the landlord ensures retailers that they are getting the value that justifies the particular rental rate each one pays. At the same time, the landlord ensures that customers are getting value for their money by ensuring that the mall attracts and retains merchants whose goods the shoppers want to buy. In other words, the shopping center landlord is a go-between whose success depends on how well he or she brings together the two parties by matching their needs, interests, capabilities, and requirements.

Although useful, this analogy is imperfect because the fair organization's mission is more complex. In particular, the primary goal of a fair organization is to mobilize the community to produce a great fair, not simply to provide a venue for purchasing goods and services. The business activity of fair organizations takes place for the sake of purposes other than those of commerce. However, the sense in which fair organizations broker opportunities for businesses and organizations is in fact similar. Their key task is to coordinate an annual fair whose exhibitions, events, and attractions entice and engage large numbers of fairgoers. By correctly matching the interests of fair exhibitors and vendors with the interests of fairgoers, the fair organization ensures that all parties leave the fair happy and satisfied.

Focusing on opportunity brokering, as the business activity of fair organizations, carries with it some important positive consequences. One of the key consequences relates to the issue of establishing a solid financial foundation. If the annual fair as a distinctive event is a relevant, important, and valued feature of community life, then effective opportunity brokering will itself contribute significantly to putting fairs on a solid financial footing, supporting the fair organizations' primary goal rather than displacing it.

Another consequence is the reverse side of the same issue. If the key business activity is opportunity brokering for the production of the fair, then fair organizations need to reevaluate their role as year-round managers of fairground facilities. In many cases, this role appears to have been a factor in distracting fair organizations from their primary goal. The chapter on the "Business of Fairs: Opportunity Brokering" explores this issue more fully.

## UNITY OF THE OPERATING PRINCIPLES

The three basic operating principles represent an organically unified view of what a reinvented fair is and how a fair organization can begin moving in this new direction. The annual fair is an event with a public purpose to provide structure and opportunity for people of a community to celebrate the local identity and character of their community. The fair organization fulfills this purpose when it succeeds in mobilizing the community to produce a great fair. The business engine behind community mobilization is opportunity brokering, where exhibitors, concessionaires, vendors, and sponsors come together with fairgoers for mutual benefit in the context of community celebration.





## PUBLIC PURPOSE OF FAIRS: CELEBRATING COMMUNITY IDENTITY AND CHARACTER

### THREE OPERATING PRINCIPLES OF THE REINVENTED FAIR

1. The public purpose of the annual fair is to provide structure and opportunity for people of a particular community to celebrate the local identity and character of their community.
2. The primary goal of fair organizations is to mobilize the community to produce a great fair.
3. The business of fair organizations is to broker opportunities to reach the market made up of fairgoers.

Public purpose defines the *why* of public sector institutions. In a free market economy, the right to engage in activities for the pursuit of personal monetary profit legitimizes the existence and operation of private sector institutions. Public institutions, however, must justify their existence using criteria such as serving the common good or providing for equal protection under the law. A public sector institution serves a purpose that the public supports with both authorization and funding because it provides public benefits.

If the state wanted to create something brand new, some institutional capacity designed to bolster community cohesiveness and motivate individual accomplishment, it would be hard-pressed to come up with a better plan or organization that would serve these purposes than the process of producing an annual fair. Quite a bit more than tradition explains fairs' enduring appeal.

Fair organizations are unusual as public institutions, although not unique, in having the capacity to generate much of their own revenue by collecting fees for the services they provide. Public funding contributes importantly, nonetheless, to sustaining fairs as community institutions. While financial self-sufficiency is a worthwhile goal, a fair organization that abandons its public purpose in order to attain mere self-sufficiency would deprive the community of important public benefits that only a fair can provide.

Questions that the reinvention project inherited – *Why is state government in the fair business? Should it be?* – relate directly to the issue of public purpose. Without giving direct answers to these questions, community stakeholders, board members, and project consultants all articulated notions of what a fair is or should be that powerfully suggest the importance of the public nature of fairs. In the words of one community stakeholder, “The purpose of a fair is to provide a neutral gathering place that bridges all the different social, cultural, economic, and geographic groups. It’s the community’s reunion where we all get together once a year with friends and neighbors.” Another expressed it in the following manner, “The fair showcases our local culture and environment and helps create a greater awareness of the community and its various parts.”

Statements like these are what led the project team to formulate the first operating principle: *The public purpose of the annual fair is to provide structure and opportunity for people of a particular community to celebrate the local identity and character of their community.*



The public purpose of fairs contributes in turn to other public goals. A community's showcase and celebration of itself, in all its aspects, can facilitate the development of relationships that create mutual appreciation and understanding among neighbors, regardless of their race, religion, or cultural heritage. In this model, fairs help build common ground and thus potentially increase the social stability, civic peace, and public safety of a community. Because producing these qualities of community life does not lend itself to profit-making, citizens share this responsibility by providing public funding and other support.

In this chapter, we explore issues that communities and their fair organizations need to consider in order to put this operating principle into action.

## ASPECTS OF IDENTITY AND CHARACTER

The first and most critical consideration in applying this operating principle is to understand and appreciate the aspects of community life that shape identity and character. *Identity* refers to a depiction of the community as a whole that most members would recognize and endorse as representative of the experience they have in living there. *Character* refers to the observable distinguishing features and attributes of the community as a unique mosaic of people with diverse talents, occupations, and cultural traditions.

Over the past half-century, many communities have accepted the distinction-eradicating effects of strip malls, international franchising, and chain stores as the inevitable by-products of a more efficient way to do business. At the same time, however, the demographic composition of California communities is changing rapidly. In other words, distinction is actually intensifying, not diminishing. Often the pace of change is uncomfortable for established segments of the population who would prefer to ignore the impact such changes will inevitably have on their accustomed way of life. Determining the make-up of a community's local identity and character is no small feat in this environment.

One way to develop an understanding of and appreciation for a community's identity and character is to study its *past* identity and character. For example, many regions have agricultural roots and heritage that continue to be important elements of a community's identity and character. The concept of using fairs to preserve a golden memory of agriculture, however, is very far from fairs' roots. Originally, fairs were the showcases for new commerce and often provided the public with its first exposure to path-breaking technological innovations.

In acknowledgment of historical linkages, it still makes sense even for fairs in urban settings to include agricultural education in their programming. To the extent that it retains its links to the living present, history is an important part of a community's identity and character. But to be truly expressive of identity and character, the agricultural education programming at an urban fair needs to be evocative of its community's contemporary experiences with agriculture. To express the point more broadly: whether it takes place in a farming region, the suburbs, or the inner city, the programming centerpiece of a fair that celebrates a community's identity and character must be today's *living* community.

Thus, rather than a single industry such as agriculture, all of a community's primary industries, both contemporary and historical, shape its identity and character. Placerville, California, home of the El Dorado County Fair, was once a Gold Rush boomtown. Today, Placerville is primarily a tourist destination and suburb. Nonetheless, one of the reinvention project consultants observed that it has retained aspects of character born of its historical association with the culture of gold mining. "While all of the mineral wealth of the area may have long ago been mined," the consultant notes, "the spirit of this place is still very much a product of the Gold Rush heritage. 'Keep an eye out for gold,' would be the first tenet of the local code. And the second would be, 'if you happen to find some gold, don't be flapping your gums about it all over town.'"

In addition, the economic, political, and social issues of a community influence its identity and character. The community's identity and character also influence *them*. One of the significant economic, political, and social issues in El Dorado County centers on accommodating growth. The way the county decides to accommodate newcomers will eventually influence the way all members of that community define their common experience. Geography is another fundamental influence on identity and character. As just one example of the impact of geography, a border community typically has much stronger cultural links with its trans-border neighbor than would a community in the interior of the country. For example, Imperial County is on California's border with Mexico. The project consultant assigned to facilitate Latino inclusion in the production of the fair noted differences in the American-Mexican relations of the Imperial Valley from other areas of California. Another influential aspect of geography is the natural environment – terrain and climate. Pride in, or adaptation to, their natural environments shapes many communities' identity and character. Resort areas such as Lake Tahoe illustrate this phenomenon.

The forms and accessibility of recreation and leisure activities clearly influence and reveal a community's identity and character. The popularity and variety of the arts and cultural options, physical or outdoor options, and entertainment or "hi-tech" options all have something to say about the qualities of life that people value in their communities. Along these lines, local cuisine is also a fundamental aspect of community character. One consultant went so far as to say, "Nothing speaks to the heart of a community like its native foodstuffs." A fair organization that intentionally applies the public purpose operating principle finds that discovering the identity and character of a community is ultimately an activity the fair organization and its community do together each year, sometimes yielding a totally new interpretation from one year to the next. Ideally, in an era when recognizing a community's identity and character can be challenging, the fair becomes a means of *discovering* them.

## **INCLUSIVENESS**

The aspects of community identity and character identified in the previous section provide fair organizations with starting points for developing structures and opportunities for community self-celebration at the fair. A basic condition for making the fair this kind of celebration, however, is the presence and participation of all elements of the community. In other words, for the fair to be a true community celebration, the fair must be inclusive of all members of the community.

In California, with its massive influx of immigrants from across the country and emigrants from around the world, inclusiveness takes on a particularly challenging aspect. Many of our friends and neighbors are new friends and neighbors, and they don't always speak the same language at home or share the same customs and traditions.



In the case of Imperial County, geography and the advent of the North American Free Trade Agreement create the likely prospect of emergence of a distinctive regional identity that reflects both sides of the border. Latino presence, in this instance in particular, serves as a ready resource for exhibits, food, and music to celebrate that presence and communicate its features to other segments of the county population. Yet the visit of project consultants to the California Mid-Winter Fair found numerous barriers to the inclusion of Latinos into the fair.

#### Obstacles to inclusion

The reinvention team discovered these barriers to Latino participation at the California Mid-Winter Fair:

- Advertising in English-language media only.
- Lack of understanding regarding needs of the region's Spanish-speaking public.
- Little or no understanding of the region's Latino culture, attitudes, and values.
- No currency exchange arrangements at the fair.
- Lack of relationships between fair management and board with key Latino/Mexicali organizations (profit and nonprofit).
- No designated bilingual/bicultural community relations staff person.

Source: Patricia Cohen-Albrecht, "California Mid-Winter Fair: An Assessment of the Latino Consumer Market, Opportunities and Barriers" (California Department of Food and Agriculture, Division of Fairs & Expositions, 1996, consultant report).

Recognition of ethnic diversity is only one aspect of newness that poses the need for sensitivity to inclusiveness. Another is age. Young people are also "new" to the community. By tradition, the annual fair has always catered to youth, especially in its agricultural education programs, as a way of drawing them into the grown-up life of the community. California communities may less often be farming communities today, but the need of young people for pathways into responsible adulthood has not diminished. Fair organizations that reach out to youth through schools, recreation programs, sports leagues, scout troops, churches, and other kinds of youth groups can be guided by the recognition that the fair celebrates today's living community, which by definition includes the lives of a community's young people. The interests and experiences of young people are a part of a community's identity and character. Fairs that are serving their public purpose address this reality. By doing so, fairs can re-integrate young people who feel alienated from society back into the fabric of their communities. The result is a more stable social order and a healthier community.



### The effects of new outreach to schools

In 1997, the El Dorado County Fair (EDCF) moved its fair dates from August to June, in part to strengthen the opportunities for partnership with local schools. In the 1997 fair program, Joyce Pogue, EDCF Board President and a local teacher, described its success this way:

“Thanks to the commitment of Vicki Barber, our county Superintendent of Schools, [in 1997,] 1,200 packets were distributed to teachers encouraging their participation in the fair. In addition, the fair board chose to waive exhibit fees for junior exhibitors. Where we had 390 youth and teen entries last year, we now have over 800 youth entries alone.”

The fair organization had also partnered with the Superintendent of Schools to provide stage time for every school in the county to present student performances. For the first four days of the fair, there was a student presentation every hour or half hour from opening until 8 p.m. including dancing, singing, oral interpretation, book writing, and story telling.

Source: Joyce Pogue, “Welcome, from fair board president,” *Mountain Democrat and El Dorado County Extra*, 11 June 1997, El Dorado County Fair edition, p. 4.

To capture the imaginations of young people, fair organizations will need to create new exhibit categories, special competitions, and other opportunities for participation that amplify the experiences and achievements of the community’s children and adolescents who are engaged in a wide range of activities. Such opportunities would also act to spur many youngsters to discover their previously hidden talents or interests. Equally important, if not more so, fair organizations should create opportunities for young people who fail to gain notice in standard venues to receive recognition for whatever it is that they do well. Success in this approach depends on the fair organization’s ability to study and characterize the local “youth culture.” Using this information, the fair organization can then shape the annual fair to appeal to and serve this target audience.

“A county fair is the culmination of a year’s work in developing skills for young people in the community. It is a place to display their learning, to be rewarded for their accomplishments, and to bring together others to appreciate and learn from these efforts. For the past century, these traditional values have focused on agriculture. For the next century, these values will be broadened to focus on other aspects of county life.” — Project consultant

Aspects of “newness” – sheer population growth, urbanization, and shifts in people’s livelihoods – have the effect of dating fair organizations’ tendency to cling to an agricultural program emphasis. At the El Dorado County Fair, some community leaders regarded local entrepreneurs as outsiders – for example, an Internet exhibitor – perhaps because of the essentially commercial nature of these exhibitors’ participation. Overcoming attitudes of this nature is critical to revitalizing fairs. Inclusiveness is one way of overcoming a reliance on tradition in order to give the fair contemporary appeal and relevance.



Inclusiveness requires awareness, which is one function of a well-conceived marketing plan. In its marketing plan, the fair organization identifies which groups within the community it has a special interest in attracting or whose attendance is particularly low. The marketing plan includes an outreach strategy for targeting these groups.

Finally, inclusiveness means that economic status should not prevent anyone from participating in or attending the fair. Pricing policies should take into account the expense of going to the fair, especially with children in tow. If the fair is for everyone, then all people should be able to participate, regardless of income. This imperative underlies the public purpose of fairs.

## THE FAIR'S PHYSICAL SETTING

As the physical setting for a community's celebration of itself, the fairground has a unique mission. Ideally, the fairground is an inspiring setting that conveys a sense of shared space. It is common ground – a neutral site for the community's annual reunion. The organization and layout of this site and the condition and form of its facilities are powerful symbols for expressing the community's identity and character.

The community should regard the fairground as a special place *within* the community as well as a venue for expressing what is special *about* the community. The project's architectural consultant makes the point well in discussing the potential of the Imperial County fairground to become, metaphorically speaking, an "oasis in the desert."

### Fairgrounds as special places

Architect and urban planner D.B. Middleton captures a vision of the fairground in Imperial as a special place that reflects the identity and character of its community:

"The palms along the highway are an inspiring point of departure. My first thought was, 'The fair is an oasis in the desert.' The palm motif could surround the grounds. From the parking lot inward, one would then sense a special environment, a fantasy come to life, whether or not an event was underway. Going one step further with this metaphor, let's imagine a giant pool in the middle of the fairground. This would reinforce the oasis theme. The palms are a wonderful border element and need to be continued around the site."

Source: D.B. Middleton, "California Mid-Winter Fair Assessment," (California Department of Food and Agriculture, Division of Fairs & Expositions, 1996, consultant report).

Not all fairgrounds can present themselves as an "oasis in the desert." Nor would it be appropriate for them to do so. With a little imagination and common sense, every community can find a metaphor that says something about its unique identity and character and find ways to shape the fair experience by giving expression to that metaphor in the layout and structure of its fairground.





## MOBILIZATION FOR A GREAT FAIR: CREATING THE MAGIC

### THREE BASIC OPERATING PRINCIPLES OF THE REINVENTED FAIR

1. The public purpose of the annual fair is to provide structure and opportunity for people of a community to celebrate the local identity and character of their community.
2. **The primary goal of fair organizations is to mobilize the community to produce a great fair.**
3. The business of fair organizations is to broker opportunities to reach the market made up of fairgoers.

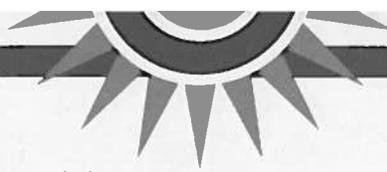
The second basic operating principle is that *the primary goal of fair organizations is to mobilize the community to produce a great fair*. A great fair is a unique form of magic. It is a fair that expresses the identity and character of the local community so well that large numbers of people in the community will attend and participate for fear of missing something wonderful if they do not. And a great fair organization is one that provides structure and opportunity for the community to celebrate itself by mobilizing that community to produce the magic of a great fair.

The second principle has two aspects: The first is community mobilization. The second is producing a great fair. This chapter considers each aspect in turn, dealing first with how to get the community involved in producing a great fair, and second with the elements that contribute to or detract from the making of a great fair.

### MOBILIZING THE COMMUNITY

Mobilizing community members to produce a great fair is not only a big job; it is also a fundamentally different one from actually producing the fair. Success in making this “paradigm shift” rests on building the right organizational capacity and providing a certain kind of leadership.

Mobilizing the community to put on a great fair involves reaching out to the community, building and maintaining goodwill, finding ways to help existing and potential participants, dealing with political relationships, and participating in the community leadership structure. It means going beyond publicizing and promoting the fair. Mobilizing the community means opening the doors to community participation and involving the community in producing the fair.



### Primary disciplines for community mobilization<sup>2</sup>

The primary disciplines needed for successful community mobilization are responsiveness, inclusiveness, and hospitality. Fair organizations tend to have these qualities already but may not always recognize their importance.

.....  
 : **Responsiveness** means listening to community members and organizations with a “getting-to-yes”  
 : mindset and incorporating their best ideas into the fair’s programs and the fair organization’s standard  
 : operating procedures.  
 : .....

.....  
 : **Inclusiveness** means taking seriously that the annual fair lacks relevance unless it expresses the full  
 : range of local identity and character. Mobilizing to produce a great fair entails a constant effort to reach  
 : out to people who, in the past, have not participated in the fair, making sure they know how to get  
 : involved.  
 : .....

.....  
 : **Hospitality** means putting out the welcome mat and being a good neighbor. Small gestures often make  
 : a big difference.  
 : .....

### Reaching out

Reaching out to the community can take a variety of forms, from holding public planning forums to directly approaching businesses and organizations and aggressively soliciting their involvement. Community members were particularly vocal about their unmet expectations regarding fair organizations’ efforts to invite feedback, volunteers, exhibits, and other forms of participation. Repeatedly, they questioned what their fair organization’s long-term plans were and whether in fact it had any. They also questioned the role that community members and groups may have had in making those plans. Community members went so far as to criticize fair organizations for a lack of interest in developing partnerships with community organizations, a lack of understanding of the purposes of other organizations, and a lack of imagination in finding a connection between other organizations’ goals and those of the fair.

Reaching out is the basic strategy for practicing the primary disciplines of responsiveness, inclusiveness, and hospitality. Reaching out is ongoing; it is never finished. In concept, reaching out to all segments of the community is simple. In practice, it is time-consuming, susceptible to misunderstanding, and exhausting. Fair organizations can minimize the complexity of this undertaking by systematically identifying and communicating with targeted populations.

“Participation of community members is the essential ingredient in a great fair. There ought to be a five- to ten-year plan that addresses community involvement.” – Community stakeholder



**Goal: new fair participants**

Groups that have not been involved before may want to participate in producing a great fair, but they may need to be asked. Being able to ask them in ways that are most likely to succeed in securing their participation rests on establishing personal contact with members of each targeted group. It may also require background analysis to learn how to appeal to each group and how to reprogram the fair to make it more welcoming to targeted populations that have not previously participated.

Year-round involvement is required to build relationships with schools, sports leagues, scout troops, churches, social service agencies, and other groups that fair organizations have targeted for outreach. Creating pathways specifically for these groups will encourage their members to produce entries for exhibit and/or demonstrations for the fair. "Insights from the Outside: Organizational Assessment through Interviews" (Tool Three), the "Multicultural Fair Planning Guide and Checklist" (Case Study One), and the companion book, *Grassroots and Commonsense Marketing for the Great Fair* (Division of Fairs & Expositions, 1999), all contain detailed recommendations and guidelines for developing strategies to identify and communicate with groups that are not currently participants in producing the annual fair.

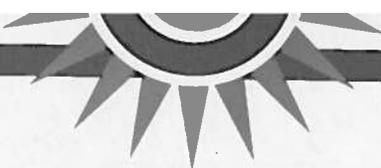
**Building and maintaining goodwill****Being a good neighbor**

"The fair organizers only come to us when they need sponsors or donations and otherwise they keep to themselves. Opening the door for honest conversation would show us that they really care what we thought about the fair. Extend the welcome mat and really mean it. Everyone is a potential ally, but the fair organizers have to exert some effort in order to attract partners." – Community stakeholder

For outreach to yield *tangible* results, it must first do something intangible: build and maintain goodwill. Community stakeholders expressed the need for reciprocity from fair boards as the basis for their participation. A great fair organization earns the goodwill and active support of the community by demonstrating its commitment to the future of the community and by showing respect for the community through concern about the quality of the fair and facility.

Lack of adequate preparation time and information were problems that community members cited as undermining goodwill. As a leader of one organization noted, "We get called on at the last minute to help create an exhibit or donate something. We want to put the best face forward at the fair and don't always get enough time and the right information to do a good job."

Repeatedly, community participants expressed a desire to be treated as legitimate stakeholders with reasonable insights and to be given a voice in decisions about those things in which they have a stake and that affect their participation as well as the overall quality of the fair. Keeping lines of communication open, publicizing the implementation of community suggestions, and showing appreciation for community involvement will lay the foundation of goodwill upon which a great fair can be built.



One tactic for building goodwill is to remain conscientious in thanking volunteers for their time and effort. Another suggestion is for fair organizations to create a system to account for volunteer help from the business community and to use and publicize this information to encourage business support.<sup>3</sup> Stakeholders tend to view the imposition of restrictions on volunteer passes as damaging to goodwill among community opinion leaders – who themselves have extended goodwill to the fair organization by committing money or staff resources in support of the fair. However, it should also be noted that since providing complimentary admission can have significant revenue impact, such passes should be offered only after careful analysis and informed deliberation.

### **Helping local exhibitors, vendors, and other participants**

Reinvention identified the exhibits and demonstrations program as the feature of fairs that most dramatically distinguishes them from other events and activities. Managing for quality in exhibits and demonstrations requires fair organizations to set standards for quality and provide assistance to new exhibitors to help them meet those standards.<sup>4</sup> The following are merely a few suggestions that begin to identify what fair organizations can do to encourage higher quality in exhibits and demonstrations:

- Set minimum quality standards and expect participants to adhere to them. The standards may refer to such aspects of quality as invitations for fairgoer interaction, appropriate and clear signage, housekeeping, staffing a booth, and preparation to communicate with fairgoers who do not speak English.
- Collect and maintain archives of photographs of especially good booths from previous years and show these photos to new booth renters.
- Offer to identify experienced exhibitors who are willing to work with new exhibitors as “buddies” to help them produce exhibits and/or demonstrations that meet the fair organization’s quality standards.
- Cooperate with nearby fair organizations to develop written manuals and training tapes to describe quality standards for entries for fairtime exhibits, booths, and demonstrations.
- Offer workshops in booth building, display techniques, cross-cultural hospitality enhancement, effective signage, and concepts of merchandising.
- Provide technical assistance to nonprofessional food booth operators in food service management and product quality.
- Give priority in year-round space rentals to tenants who agree to produce an entry for fairtime exhibit and/or present a demonstration of their business activity.

Fair organizations may also consider actual fairtime tools, for example, award programs for recognizing and acknowledging superior efforts, perhaps creating prize-winning designations such as “Best Taste of the Community” or “Best Service.” Concessionaires could then use the recognition as part of their merchandising pitch, and the fair organization will demonstrate to the community that it has a system for ensuring food quality.

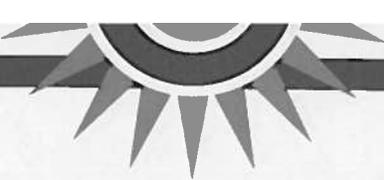


### A concessionaire relations improvement initiative

With the help of Steven Weiss, a reinvention project food service consultant, the California Mid-Winter Fair & Fiesta (CMWFF) defined its market niche and explored pricing strategies, revenue diversification, marketing and promotions, and relationship building with professional concessionaires, suppliers, commodity boards, and local restaurants and retailers. Two new ways of helping local exhibitors and concessionaires also emerged from this work:

- *Fair deal program*                      The “Fair Deal” at the CMWFF was a program to develop “value-meal deals” for fairgoers. Three components were critical to its success:
  - Concessionaire relationship-building                      The fair organization treated the concessionaires as partners rather than tenants. Their participation in the program was optional. No one was forced to run a sale during peak volume periods.
  - Incentives                                      The fair organization provided a financial incentive for participation by offering a \$100 prize for the best deal offered to fairgoers.
  - Promotion                                      The fair organization promoted the availability of these deals on signage placed throughout the fairground and in press releases sent to local media.
  
- *Concessionaire awards*                      This program conferred traditional prize ribbons and, in a couple of instances, modest cash prizes on concessionaires whose performance was superior in the estimation of fair management – and, in the case of awards linked to total sales, in the estimation of the public. CMWFF gave major awards for “The Fair Deal” (best value promotion on the fairground) and “Best of Fair,” both of which received award plaques and cash prizes of \$100. CMWFF gave first place and honorable mention awards to both food concessionaire and commercial exhibitors in the following categories:
  - Professionalism (cooperation with fair management, overall business skill).
  - Beautiful Booth.
  - Good Neighbor (peer identification for helpfulness to other concessionaires).
  - People’s Choice (determined by total sales).

Source: Steven Mark Weiss, “Fair Business in a Sophisticated Service Economy” (California Department of Food and Agriculture, Division of Fairs & Expositions, 1997, consultant report).



## Political relationships

A final area of community mobilization involves the political context of fairs and fair organizations. Though not significantly different from outreach in general, fostering and maintaining relationships specifically with local elected officials is necessary for successful community mobilization.

“Local government really isn’t aware of what’s happening on the fairground. Developing our interest in paying attention would require intensive education; maybe a year’s worth of dialogue, with city and county officials.” — Community stakeholder

Politics is a fact of daily life. The trend toward small but vocal interest groups’ domination of the political landscape is both an opportunity and a challenge for fairs. The opportunity is to invite members of activist groups to participate in the fair and deepen fairgoers’ awareness of local issues and how to participate in resolving them. The challenge lies in learning how to manage the competing demands and perspectives of special-interest groups. As a state-affiliated entity, a DAA can remove itself from local politics to some degree. However, doing so may result in a public perception that the fair organization lacks accountability to and interest in the local community – the fair’s primary customer base. Thus, remaining aloof from local politics can be a great fair’s downfall.

### *Fair board members as ambassadors*

Fair organization CEOs and staff sometimes act as “ambassadors” in representing the interests and needs of the fair and the fair organization, but they are somewhat obliged to do so as an extension of their employment. Directors, as volunteers, bring an extra measure of credibility to their interactions with other members of the community. Because they don’t *have* to be ambassadors for the fair and the fair organization, the willingness of directors to do so carries more weight.

Practicing the primary disciplines of responsiveness, inclusiveness, and hospitality can help directors bring credibility to the fair organization throughout the year, enhancing the fair organization’s reputation as a community leader. In their role as ambassadors for the fair and fair organization, board members may want to consider such actions as the following:<sup>5</sup>

- Use community input gathered through public meetings, fairgoer surveys, and community interviews to prepare five- and ten-year development plans for the annual fair and fairground. Present these plans throughout the year to schools and government agencies and at meetings of local service clubs. Ask these organizations for help in meeting specific needs and goals.
- Consider developing written policies regarding the perquisites of board membership. Be sensitive to public perception.
- Consider hosting a board-sponsored reception for key partners and volunteers at fairtime to convey the fair organization’s appreciation for their contribution to the production of a great fair.
- Consider making a contribution to the fair organization on an annual basis. Set an example for other individuals and local businesses by helping to meet the fair organization’s need for financial support.
- Be sure that board orientation sessions encourage new directors to take responsibility, on behalf of the fair organization, for building and maintaining good relationships in the community throughout the year. One of the duties of a director is to tell the public on an ongoing basis why the fair is important and to help the community understand the fair organization’s need for support.



### Participation in the community leadership structure

All communities have unofficial leadership or power structures. These structures emerge less from design than from a combination of historical accident and individual ambition and determination. Certainly, there is no statute that designates, among the innumerable possibilities, who will have the decision-making power in any given community.

There is no single pathway that will lead every fair organization into vigorous participation in its community's leadership structure. Rather, a fair organization will be recognized and sought after for the contribution it has to offer primarily in response to the individuals who represent it. It is important for the CEO, staff, and board members to let local decision-makers know of the fair organization's capabilities and willingness to help. Some of the activities suggested below would point fair organizations in the direction of becoming participants in the community leadership structure, but these ideas truly represent only the tip of the iceberg.

- Volunteer to help community organizations plan their own special programs and fundraising events.
- Invite representatives of local groups that have recently been involved in reinventing or restructuring their own organizations to an open forum on the pitfalls and rewards of reinvention. Increase everyone's knowledge base and access to organizational assessment expertise by becoming each other's peer consultants.
- Remodel or renovate the boardroom so it becomes a highly desirable meeting venue. Upon completion, invite other groups in the community that have similar goals and aims to hold their meetings in the fair organization's boardroom.
- Consider creating a joint powers authority with other public agencies for the cooperative purpose of sharing the costs and benefits of identifying trends, issues, and opportunities for new community services and to engage in new entrepreneurial activities.

### MAKINGS — AND UNMAKINGS — OF A GREAT FAIR

It is difficult to define what makes a great fair. That is undoubtedly why the word "magic" comes up frequently in explanations of what makes any particular fair work. But a great fair is more than just the sum total of its elements. It is the interaction of those elements to create something magical – something psychologists call a "gestalt."<sup>6</sup> The interaction of elements is what makes the fair a distinctive and unique event. It also gives the activities engaged in at the fair a unique quality, one that makes the same activities seem deficient when people engage in them outside the context of a fair.

#### Attending to basic program components of a great fair

The basic program components of a great fair are community reunion, culmination and recognition of individual achievement, participation and memory making, and fun and indulgence. Fairgoers and participants interviewed by the project team identified these components as the most compelling parts of the fair experience – the ones that kept them engaged year after year.

Fairs as events have inherited strong traditions that tend to treat expression of the basic program components as fixed and unalterable, almost "sacred." Practicing the primary discipline of responsiveness suggests that fair organizations will want to look for ways to *manage and modernize* these basic program components. Agricultural exhibits, for example, do not exhaust the potential of culmination as an experience that leads to individual recognition any more than a carnival exhausts the possibilities for having fun. Experimentation with all of the basic program components can lead to new ways of building on their enduring appeal.



### **Community reunion**

The reinvention team conducted interviews with 60 community members at the pilot sites and engaged in countless conversations with fairgoers at fairs throughout California. One of the strikingly recurrent comments was that many fairgoers attend the fair in hopes of seeing people they know.

This community reunion dimension of fairgoing is a component that makes fairs markedly unlike the typical entertainment attraction. People may decide to go together in small groups to a movie, concert, or other entertainment option. However, *except* for fairs and other events that have this reunion component – such as a church supper, school bazaar, or family reunion – the possibility of meeting up with family members and friends is not typically a primary motivation in the decision to attend.

In the context of a small farming community, a fair was a party for people who either already knew each other or wanted to get better acquainted. In today's world, however, *thousands* of people attend any single fair – more than could possibly know each other. Making community reunion work in these circumstances requires an intentional effort to create this particular form of magic. The challenge for fair organizations, in other words, is to bring people together in new ways that are meaningful in contemporary society.

People today are busy. In most households, all the adults work outside the home. This tends to be as true for farm families as for suburban and city families. For community and family life to thrive in these circumstances, someone has to be the “social director.” People are no less interested now than they have ever been in getting together with others who share their interests, but they often are more pressed for time. A great fair helps fairgoers who are seeking ways to expand their interests and strengthen community ties to find each other *at* the fair. There is no limit to the possibilities for embellishing on the traditional program component of community reunion. A few simple examples might be to:

- Calendar and publicize specified groupings in designated areas (perhaps book group members, church youth groups, youth athletics' parent groups, and so on).
- Recognize the courtship function of the community reunion program component by planning events for singles (barbecues, dances, and so on).
- Invite neighborhood associations to an event at which they will have an opportunity to learn about each other's efforts and outcomes of their best neighborhood improvement projects.
- Schedule sing-alongs and dancing for different age groups.
- Create opportunities to build regional awareness and understanding by sponsoring “best of the best” regional exhibits, drawing entries from other fairs and other organizations (such as arts councils, commodity groups, chambers of commerce) in the surrounding multi-county region.

### **Participation and memory-making**

One of the most significant ways to participate in a great fair is to produce an entry or exhibit, but it is not the only way. Participation of volunteers also helps make the annual fair an event that truly represents local identity and character. Interviews with community members revealed a clear willingness and even a longing to participate in activities that engage family groupings in meaningful effort as well as recreation. Parents especially would welcome more support in creating situations and managing tasks that teach those lessons that help children grow into successful adults and responsible citizens.



### Make the entire community part of the “fair family”

- Create a local advisory committee that is representative of the community. Ask for and use their ideas and suggestions for reaching out to targeted groups.
- Develop a systematic prepare-for-the-fair schedule of meetings and announce the formation of committees related to each aspect of the fair. Structure the planning process and timeline so that participants can be timely in meeting the fair organization’s schedule.
- Widely publicize and promote the procedures and deadlines for submitting entries for exhibit months in advance. This will allow everyone who wants to participate to know how and when to get involved. Use paid advertising and/or grassroots marketing (such as distributing flyers to local craft and hobby shops), as well as news releases.
- Use the fair organization’s network of relationships with schools, cultural organizations, arts groups, churches, service clubs, neighborhood associations, industry and business groups, government agencies, and unions to reach and communicate with members and affiliates of all these organizations. For example, insert an invitation into these organizations’ newsletters to participate as a committee member or to produce entries for exhibit.
- Let the ideas for improving the annual fair flow from the people who participate in this process.

Churches and schools are the institutions that most families depend on for help in bringing design and structure to family life. Fair organizations have the potential to become such an institution, as evidenced by those families who participate in producing the local fair most often speak of their experience with pride as well as gratitude.

A fair organization makes it possible for families and community members to volunteer and participate by providing the organizational infrastructure for their participation. Components of the infrastructure for participation are a committee structure, meeting schedule, meeting place, and communication.

In daily life, people regularly have opportunities to be spectators and fans, but only rarely are they invited to become *participants* in creating major community events. A great fair – through its programming and vendors – offers fairgoers numerous ways to learn, test skills, and have experiences *outside* the normal range of daily life. This quality of interaction and participation ensures memory-making experiences, encourages a lasting affection for the fair, and offers opportunities to identify new interests. The higher the level of engagement offered by a fair exhibit or event, the more likely it is to create a memorable experience.



### Levels of visitor engagement at a fair

Michael O'Hare identified a seemingly unintentional hierarchy in the opportunities available for fairgoers to participate in the El Dorado County Fair:

1. Watching other people do things.
2. Limited touching and feeling (e.g., reaching through a fence to touch stock).
3. Unconstrained engagement without bars or distance (e.g., petting zoo or surfing the Internet).
4. Engagement that changes or makes something (e.g., spinning wool into yarn or contributing to a mural).
5. Being part of the official program (e.g., hay baling contest or poetry reading).
6. Being part of the program with a rehearsed act (e.g., country or folk dancing).

He went on to say, "The differences among these levels are important: actually spinning wool or surfing the Internet on a computer, for example, are entirely different propositions from seeing a sweater or watching a video of a computer demo. While a fair needs lots of formal acts in [level] 6, the managerial push should be to move exhibits and events from lower levels toward [levels] 4 and 5."

Source: Michael O'Hare, "El Dorado County Fair: Reinvention Study" (California Department of Food and Agriculture, Division of Fairs & Expositions, 1996, consultant report).

Fair exhibits are unparalleled as an example of individual participation. Regardless of the category, entering an exhibit involves planning, skill-building, commitment to achieving goals, and the satisfying opportunity to show off. It is a form of personal story telling in which each participant gets to announce, *This is what I value, it's an important part of my life, and I'm proud of my achievement.*

### Making memories through making awards

At the 1997 California Mid-Winter Fair & Fiesta, the fair organization developed the Imperial Impression Awards, also known as "IMPIs," in acknowledgement of the fact that winning a ribbon is a pleasurable experience, as well as one that differentiates fairs from other forms of recreation.

The IMPI awards extended the possibility of winning a ribbon to everyone on the fairground, whether or not he or she had entered a formal competition. The ribbons were embossed with the legend "I Created an Imperial Impression." Fair management and board members gave these awards to anyone they saw performing an act or service that uniquely and positively enhanced the experience of the fair for others. The "judges" looked for people and moments that made the fair a special experience. For example, fairgoers won IMPI ribbons for acts of courtesy, unique apparel, or just particularly happy smiles.

Source: Steven Mark Weiss, "Fair Business in a Sophisticated Service Economy" (California Department of Food and Agriculture, Division of Fairs & Expositions, 1997, consultant report).



### ***Culmination and recognition of individual achievement***

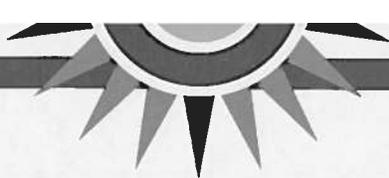
Culmination is an enormously important human experience. Participating in a project that requires a long time to complete teaches that daily effort sometimes pays off only in the long run, that mistakes can be overcome, and that giving and receiving help are important principles necessary to reach certain levels of achievement. Conditions of modern life have narrowed the opportunities to engage in projects of this kind and to enjoy the benefits that such engagement offers. Increasingly headed by single parents or often two busy breadwinners, today's families need help in teaching their children the virtues of patience, commitment, persistence, and dependability, as well as a tolerance for delayed gratification.

It is true that fairs are not the only venues that offer culmination experiences based upon individual achievement. Schools, for example, provide opportunities for children to demonstrate distinction and excellence in academic performance after hard study and in athletics, music, and drama after much practice.

However, fair organizations as community institutions do have a rare capacity to engage large numbers of people in disciplined project development sustained over time – in families, groups or as individuals, involving children and seniors and every age in-between. Fair organizations' most difficult but conceivably most important task is to mobilize this completely decentralized activity throughout the 12 months between fairs. In the end, the desired result will be that people representing every niche of the fair organization's market area will have completed projects they want to enter in the community showcase. Increasing the number of exhibitors is one of the ways the fair organization can be sure its primary disciplines for community mobilization are paying off.

It is not necessary to compete to achieve this result. For example, the very act of producing an exhibit that others will have the opportunity to see generates all the recognition many people need to feel acknowledged and accepted by their community. Recognition, acknowledgment, and acceptance validate the time expended by participants, thereby providing a satisfying experience of culmination.

Making the exhibits program easily accessible is a fundamental obligation of fair management. The exhibits program draws fairgoers into a friendly setting in which participants and spectators can meet others who share their interests. It is an important way in which fairs help to create and sustain a community's social fabric.



### **Culmination and individual achievement as community-showcasing entertainment**

The annual El Dorado County Fair has a particularly successful event that combines the basic program component of culmination and recognition of individual achievement with entertainment: the John M. Studebaker Championship Wheelbarrow Races. Sponsored by local service organizations, the event has been a highlighted tradition of the El Dorado County Fair for over fifty years and is one for which members of the community train for several weeks leading up to the event. A fair program in 1996 described the event as follows:

“The races commemorate one of Placerville’s founding fathers, Studebaker, who earned his fortune crafting wheelbarrows for the Gold Rush miners. Studebaker used these funds to go on and create his namesake automobile, for which he became famous.

“[In each race,] competitors carrying a maximum of 50 pounds of ore in their wheelbarrows are challenged by such obstacles as a rocky creek bed, a fallen log, a narrow bridge, and a waist-deep water crossing. [When judges weigh each contestant’s load at the end of the race,] the first finisher in the past has sometimes been disqualified for not carrying the required 50 pounds of ore, which adds to the excitement and uncertainty of this unique event.”

Source: “Enjoy the ‘Wild and Woolly’ Wheelbarrow Races Aug. 3,” Mountain Democrat and El Dorado County Extra, 31 July 1996, El Dorado County Fair edition, p. 27.

### ***Fun and indulgence***

Fun at a great fair is one-part frivolity and two-parts the sense of excitement that comes from being in an enlivening situation that is outside one’s ordinary experience. For some people, this may be a whirl on the latest carnival ride. For others, it may be sharing a dance with a stranger, or participating in unfamiliar cultural traditions. What makes this out-of-the-ordinary experience truly fun, even with its accompanying jangled nerves and heightened senses, is the assurance that it will also be a safe experience.

Indulgence is unrestrained gratification. Fairs are notable for providing opportunities for essentially harmless forms of indulgence. Our civic culture is highly risk adverse and parsimonious. Everyone, from teachers and doctors to government officials and newspaper editors, exhorts us to eat well, stay fit, buckle-up, and spend our time and money wisely. However, because fair attendance is an infrequent option, fairgoers feel free to relax the rules that normally inhibit indulgence.

A common theme in reinvention fairgoer surveys was an appreciation and anticipation of fair foods for which fairgoers had “saved up” calories in order to eat with joyful abandon. This component of indulgence is also manifest in the leisure with which people peruse the offerings of fair programming, pacing themselves not by someone else’s clock, but by their own sense of whether they’ve seen enough, heard enough, experienced enough. At a great fair, fairgoers find things that captivate them and compel them to create an experience in which they suspend routine and reason as the “rules” of daily life.





Fun and indulgence are the currencies that allow people, who might be wary of each other in other circumstances, to drop their guard and yield to a friendly and playful curiosity in each other. In comparison to community reunion, culmination and recognition of individual achievement, and participation and memory making, fun and indulgence could seem to be the program components having the least to do with the public purpose of a great fair. In reality, however, creatively managing an environment in which people can safely indulge in frivolous and exciting experiences is no less essential to creating the magic of a great fair than managing for the quality of community reunion or any other basic program component.

### **Education, commerce, and entertainment**

What this chapter identifies as “basic program components” might also be thought of as outcomes, or the effects, of a great fair. Other, more tangible elements are equally important to producing a great fair, namely, education, commerce, and entertainment. In fact, education, commerce, and entertainment are deeply encoded in the history and genealogy of fairs and are fundamental to the experience that fairgoers are seeking when they attend fairs today. That these elements are frequently central to a fair organizations’ discussion of their business purposes suggests that many fair organizations are already intentionally managing these elements of a fair’s gestalt. This is understandable. Education, entertainment, and commerce are concrete, easily identifiable aspects of fair programming. However, the expectation that fair organizations can or should create an educational, commercial, and entertainment enterprise that competes with society’s very successful and enormously prevalent alternatives for these experiences may be a fatal proposition.

Culmination is an abstraction. People can recognize having experienced it, but it may be difficult to describe or visualize. It is equally challenging to determine how to manage. However, the reinvention project findings strongly suggest that the less tangible program components are keys to the magic of a fair. Intentionally managing what this chapter identifies as the basic program components leads fair organizations into a world in which they have no competition. Rather than a marketplace in which potential fairgoers make a decision of whether to take their family of four to the movies or to the fair, the choice becomes whether to go to the fair or disregard year-long efforts of neighbors, family, and friends to create an exciting community showcase.

This is not to say that education, commerce, and entertainment are less important than the basic program components of a great fair but rather that they are less dependent on intentional management to become manifest. For example, a fair organization that intentionally manages community reunion, culmination, and the other basic components through a program to engage cultural associations in planning for the fair will most likely find that the way those organizations want to participate is to develop exhibits that educate, conduct commerce in cultural artifacts or foods, and/or present musical or other performances that entertain. To restate this point from the opposite perspective, intentionally managing education, commerce, and entertainment will not necessarily result in manifestation of the basic program components, but intentionally managing the basic program components will show up in fair programming as education, commerce, and entertainment.



## Fairgrounds and facilities

### Landscaping and topography

“A park-like setting, with lots of trees and landscaping, is desirable for fairgrounds. Large trees strongly signal tradition and institutional presence. Looking up a hill to see a hint of an event or display or walking along a ridge looking down onto the main lawn impart variety in spatial experience and a sense of theatricality.” — Project consultant

In the chapter, the “Public Purpose of Fairs: Celebrating Community Identity and Character,” the notion is presented that fairgrounds can and should themselves express something unique about the community’s identity and character, thus providing an inspiring and meaningful physical setting for community celebration. A fairground is inseparable from the fair’s gestalt. But as noted frequently in studies of the pilot sites’ annual fairs, other facility-related factors also contribute to the fair experience and production of a great fair.

### *Primary disciplines for attending to the fairground and facilities?*

A fairground is the community’s home. It has to be in good repair to remain functional. It also requires attention to its amenities – the aspects of a place that make it welcoming, attractive, and comfortable. And a fairground works best when it has an aura of something “special” about it – something out-of-the-ordinary and wonderful.

- **Maintenance and repairs** means that the fair organization keeps the fairground and all its facilities presentable for use by the community and makes repairs when structures deteriorate to the point of diminished usefulness.
- **Comfort** means that the facilities and furnishings have the capacity to provide physical ease and well-being.
- **“Specialness”** means that local residents leave the fairground with a sense of having been transported by their fairtime surroundings into a different way of seeing themselves and the community.

At a great fair, the fair organization establishes an environment of quality. Fairground structures have a clear purpose and convey a sense of deliberate and regular care taking. Seemingly small details can make a difference. For example, adding architectural lighting on some of the larger structures establishes a landmark quality for a fairground. Incandescent spot and flood lighting for graphic or art exhibits displays the entries to their best viewing, ensuring the exhibitors’ sense of pride.

If a fairground is one form of expression of a community’s identity and character, then disrepair and haphazard presentation do not speak well of either the community itself or the fair organization’s respect for the community.

### **Amenities**

Amenities make fairgoers feel comfortable so they can relax and enjoy their fair experience. That experience begins with fairgoers' approach to the main gate and continues to unfold with every step on the fairground.

Some of the amenities that interviewees named with special appreciation are:

- Easily identifiable and friendly fair staff.
- Clean, easy-to-find restrooms.
- Generally clean and green grounds.
- Shady places to sit and rest.
- Easy-to-find, well-placed information booths.
- Water fountains.
- Easy-to-find and easy-to-read programs and maps of the fairground.
- Well-placed and frequently emptied garbage cans.
- Accurate and abundant signage to fair events and attractions, restrooms, information booths, telephones, ATMs, first aid, lost and found, administration office, security headquarters, shuttle services, and parking.

### **Safety**

Creating a safe environment for families is an important measure of quality management. In some communities, this may be as simple as providing well-lit parking lots and easy access to telephones that reach emergency service providers at no cost. The degree to which this effort also requires the obvious presence of public safety officers and rigorous rule enforcement depends on an individual community's experience.

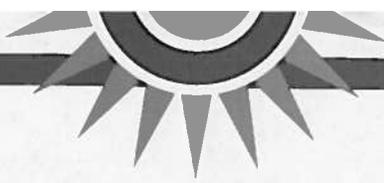
For example, Imperial County has experienced an increase in violent crime in recent years, resulting in generalized anxiety about personal safety in public settings. Although the overt presence of law enforcement and metal detectors during the project team's fairtime site visit seemed extreme to some out-of-county visitors, local residents and families seemed to draw a greater sense of comfort from the increase in security.

Ensuring the public's safety is and should be an increasing priority for all public event organizers. How best to accomplish this depends wholly on local issues and concerns. Providing appropriate levels and forms of event security requires fair organizations to be knowledgeable about community trends and safety concerns and to develop productive partnerships with professional and volunteer public safety organizations. Appropriate security presence at a fair communicates a sense of care and concern for family and community well-being and a measure of responsible management of the community's annual celebration.

### **Making the fairground a "special" place**

Making and keeping the fairground an inviting, welcoming, festive place where the community delights in gathering requires focus and vision. Comments made in interviews, both by members of the community and by project consultants, indicate that the nature and condition of the physical setting for a fair determines the degree to which many people find the fairgoing experience memorable.

Fair organizations may want to engage their communities in public forums to discuss alternative visions for creating local facilities that have a vivid sense of "special" place – one that expresses the unique identity and character of the community. The specific ideas that will make a fairground a special place vary according to local concepts of what is attractive and suitable. Thus, this process requires considerable discussion at the community level. The community's vision for the fairground then becomes the primary guideline for preparation of a site management master plan.



### **Site management master plan**

The great fair happens on a fairground where the fair organization makes an effort to ensure that all repairs, additions, or new construction build toward the vision of what participants want the fairground to say about that community. Making an annual assessment of facility conditions enables the fair organization to update the master plan on a routine basis and adhere to a schedule and budget for planned maintenance, including cleaning, paint jobs, décor and furnishing upgrades. Reinvention project consultants frequently observed the need for the following types of improvements, which might well be included in a site management master plan:

- Increase the number of restrooms; improve the condition and cleanliness of all restrooms.
- Upgrade and expand the capacity of utilities. For example, ensure an adequate supply of electrical power, with enough outlets to prevent unwanted generator noise and trip hazards from heavy-duty extension cords.
- Eliminate a run-down appearance of the fairground. For example, tear down structures that are in partial or complete disrepair.
- Use imaginative landscaping and architectural lighting to create visual interest and establish a landmark quality for the fairground.
- Introduce or preserve, wherever possible, topographical variation.

#### Notes:

<sup>2</sup> "Primary disciplines" are values, principles or guiding influences that, taken together, comprise a mindset for success.

<sup>3</sup> More fully, the idea was to provide an individual and overall count of volunteer hours (per business and for all businesses).

This would enable the fair to calculate and then tout the amount of business/corporate support received, in this way validating the fair as a community enterprise. Receiving press attention for support from business would also enable the fair organization to sell the fair's "business volunteers for the community" concept more readily to other businesses by pointing to existing levels of support.

<sup>4</sup> The "Multicultural Fair Planning Guide and Checklist" in this book contains more suggestions for providing this kind of assistance.

<sup>5</sup> All of these activities should be undertaken in consultation with the CEO and other directors. Board members who act on their own authority without consulting the management and each other may actually diminish the impact and influence of the fair organization. The "Self-Assessment for Fair Board Members" tool included in this book can help board members, as individuals and as a group, to increase their understanding of the board's obligations and limitations.

<sup>6</sup> In general, the term "gestalt" refers to some configuration, whether of ideas, physical elements or components of a system, having properties that cannot be derived only from its parts.

<sup>7</sup> See note 2 above.





# BUSINESS OF FAIRS: OPPORTUNITY BROKERING

## THREE BASIC OPERATING PRINCIPLES OF THE REINVENTED FAIR

1. The public purpose of the annual fair is to provide structure and opportunity for people of a community to celebrate the local identity and character of their community.
2. The primary goal of fair organizations is to mobilize the community to produce a great fair.
3. The business of fair organizations is to broker opportunities to reach the market made up of fairgoers.

The third basic operating principle is that the business of fair organizations is to broker opportunities to reach the market made up of fairgoers. A fair is primarily a celebration and only secondarily a business. But business activity is what makes the celebration possible. The key business activity underlying a fair organization's efforts to mobilize the community for a great fair is the activity of opportunity brokering. The logic behind this principle is simple: for the fair itself to be a financial success, a fair organization has to create opportunities for other entities to enjoy financial success.

As noted in the chapter on "Reinventing the Annual Fair," the activity of opportunity brokering is similar to that engaged in by shopping center landlords. A shopping center landlord attempts to attract as many shoppers as possible by ensuring that tenants in the mall are selling goods and services that shoppers want to buy. If the landlord succeeds in this endeavor, merchants will be willing to pay rental rates that are commensurate with what it is worth to gain access to that market of shoppers.

As mentioned earlier, this analogy is imperfect, because the business activity of the fair organization takes place for a purpose that is larger than just a commercial one, namely, to produce a great fair. Nonetheless, the analogy is apt because, to produce a great fair, a fair organization coordinates an event that attracts large numbers of fairgoers by having brokered opportunities to businesses and organizations whose presence at the fair will motivate fairgoers to attend.

Being successful in this role requires cultivating a keen understanding of the local market area and facilitating an event that satisfies the highest expectations of both fairgoers and business partners. The process of engaging the entire community in producing a great fair, then, has the very valuable spin-off effect of increasing the revenues of all local organizations and businesses that share in the economic impact generated by the fair.

This chapter addresses the primary responsibilities and consequences of opportunity brokering and explains the value of this operating principle. Key responsibilities include profiling the market of fairgoers and providing the resulting information to entities whose participation in the fair will help attract and satisfy those fairgoers. A less tangible but equally important responsibility is to anticipate that focusing on opportunity brokering will divert management attention and energy away from fairground management (if relevant). In other words, fair organizations that develop and advance their role as opportunity brokers may need a new management structure to ensure that needs for facility maintenance and upgrading also routinely receive the attention they require.



## CREATING THE CAPACITY FOR OPPORTUNITY BROKERING

To implement this third operating principle, fair organizations can begin by identifying and describing the opportunities they are brokering. Some fair organizations are doing this already, using established marketing techniques similar to those used by shopping center landlords to attract tenants. Such techniques involve:

- Creating detailed demographic profiles of fairgoers and fair participants.
- Packaging this knowledge of fairgoers and fair participants in ways that enable other organizations and businesses to decide whether exhibiting, sponsoring, and/or selling during fairtime will be a smart use of their fund development or marketing dollars.

In response to market trends and customer preferences, fair organizations, like other businesses, occasionally need to design and add new products, programming, and services in order to maintain and grow their customer base. Having the capacity to recognize and act on new business opportunities is primarily a function of knowing the local market.

In the best case scenario, the fair organization's effective use of data on the market of fairgoers will attract vendors, sponsors, and event organizers whose contributions to the annual fair will keep fairgoers returning not just year after year, but as often as possible during each year's fair.

### Primary disciplines for opportunity brokering<sup>8</sup>

Any good business must have as its foundation the primary disciplines of integrity, accountability, and prudence. These disciplines are crucial for the fair organization if it is to build successful working relationships with its business partners.

**Integrity** means "doing the right thing" and honoring commitments, even when it is inconvenient or requires more effort than the fair organization may initially have anticipated.

**Accountability** means knowing the reason or basis for the fair organization's major decisions and actions and being prepared to provide that information whenever anyone asks.

**Prudence** means exercising good judgment and common sense in practical matters.

Most California counties are experiencing growth not only in population base but also in diversity. In comparison, fair attendance is declining as a percentage of population. This hard fact serves as a warning to fair organizations that fewer people are being attracted to and satisfied by the fair experience. California's minority-majority population shift dictates that fair organizations investigate and develop more effective ways to practice inclusiveness by attracting and satisfying these population groups at the annual fair.

Fair organizations need first to gather, analyze, and categorize information about the specific composition of fairgoers in the local market. They then need to "package" this information: prepare demographic and consumer profiles that will inform prospective vendors, concessionaires, sponsors, and other business partners about the market of fairgoers they will reach by establishing a presence at the fair. The importance of accuracy in this endeavor cannot be overstated. It is difficult for any entity to win back confidence once the information it has provided, as the premise for another organizations' sales strategies, has proved faulty.

The “Multicultural Fair Planning Guide & Checklist” and “CEO Report to the Board on the Annual Fair,” both of which appear in this book, contain sample formats for compiling and presenting this kind of information. *Grassroots and Commonsense Marketing for the Great Fair* provides additional and even more detailed suggestions in this regard.

The chapter on “Mobilization for a Great Fair: Creating the Magic” suggests some of what fairgoers look for in the fair experience. This information was gleaned from a series of conversations and formal interviews with fairgoers. Interviewing is a cost-effective market research technique that brings the “voices of customers” inside the fair organization. Asking open-ended questions yields important customer feedback. For example, “What is the best exhibit you’ve ever seen at any fair?” It may also be eye opening to ask fairgoers at random whether they know how to submit an entry for exhibit at the fair.

“Insights from the Outside,” included in Part Four of this book, provides guidelines for conducting interviews. Especially important, “Insights from the Outside” outlines methods for analyzing the information obtained through interviews to make such information useful for planning changes in fair programming.

### Analyzing prices

Fairtime prices tell a community how well the fair organization knows and understands the people who come to and participate in the fair. Fair organizations may want to experiment with cost-cutting, revenue-shifting, and family-friendly pricing strategies – ideally in cooperation and consultation with their business partners, especially fairtime vendors and concessionaires.

Ultimately, the “right” price is the one that represents the fair’s value. Cutting prices or eliminating admission fees is no guarantee of increased attendance and participation. Issues that make a difference have more to do with the fair organization’s effectiveness in mobilizing the community for participation, quality of fair programming, and attractiveness of the fairground than with the admission price. To the extent that high prices impede access to the fairgoing experience, however, fair organizations may need to review their pricing structure and strategy.

### Youth activities to drive attendance

“Attracting kids to the fair, involving them in the fair, will bring in adults as well. Kids will drive fair and fairground attendance now and forever. Thinking about ways to expand the fairground and build attendance demands a wide-angle focus that has to include youth activities in general and school-based participation in particular.” – Project consultant.

Many fair organizations in the California network have experimented with reducing or even eliminating admission fees. In considering whether to adjust admission price, it may be useful to find out why these fair organizations felt it was important to take this action and what the results were (in other words, what was the effect on attendance and revenue?). Careful planning may enable fair organizations to compensate for loss of admission revenue, but just cutting prices without improving quality is not guaranteed to increase market share. Indeed, in the long run, improving quality is likely to prove a more successful business development strategy than cutting prices.



### Managing for quality

As opportunity brokers and mobilizers of community celebrations, fair organizations must attend to details that ensure customer satisfaction. The mindset necessary for successful quality management stems from recognizing that every exhibitor and every participant affects the quality of the fair for every fairgoer. Naturally, a balance must be achieved between quality and cost considerations. For pointers on how to sharpen awareness of the many details that add up to fairtime quality, in particular, see the “Fairtime Assessment” and “CEO Report to the Board on the Annual Fair” (see Part Four: Tools).

#### Entrepreneurial outlook

“Fair organizations need to look at things from an entrepreneurial point of view. The greater benefit comes from thinking more like a successful company and less like a government agency trying to get by on a tight budget.” - Community stakeholder

### Learning from other fairs

In general, studying other fairs and fair organizations is the most direct form of market research. This is because it is easier to be objective when observing how fairgoers in a different community respond to the activities and features of their annual fair. Some of the specific ways fair organizations can work smart are to:

- Maintain interactive, year-round relationships with other fairs. For example:
  - Volunteer to complete the Fairtime Assessment form provided in this book and invite reciprocal assessments by CEOs and board members from other fair organizations.
  - Bring back the best ideas from those fairs for local implementation.
  - Sponsor educational and social events for multiple fair organizations’ boards of directors.
- Participate in professional development and peer education programs to increase skills and knowledge of trends and successes.
- Offer assistance and information to new CEOs in the region and the network.
- Work cooperatively with nearby fair organizations to solve problems and, wherever feasible, to share staff and equipment.

### Creating brand identity

Creating a “brand identity” for the annual fair is a marketing and promotions technique that builds on a symbolic representation of local identity and character. This entails recognizing the unique context that every community produces and then consciously building on the community’s distinctive characteristics to generate excitement and anticipation for the annual fair. For example, creating a brand identity for the California Mid-Winter Fair by adding “& Fiesta” clearly holds out an expectation that the cultural influence of the dominant population in Imperial County will be in evidence at the fair.

Constantly reinforcing the fair’s brand identity strengthens its image and popularizes its character. One method of reinforcement is to incorporate the fair’s logo on all buildings and grounds signage. Another is merchandising.<sup>9</sup> If it is financially feasible to do so, earmarking some of the merchandising proceeds for local causes is a way the fair organization can demonstrate good faith as a community institution. It also establishes the fair organization as a contributing member of the community leadership structure. Disclosure as to the use of merchandising proceeds represents the fair organization’s intentions and is an exercise in the primary discipline of accountability.



When the fair has a clear brand identity, vendors, concessionaires, and other business partners can more easily create their own ways to enhance the fair's image and add new dimensions to the fairgoing experience. Local restaurant owners, for example, may decide to create and name a "signature" menu item related to the fair's brand identity and offer that item only during fairtime.

#### **"Signature" menu items**

"Nothing speaks to the heart of a community like its native foodstuffs. Participation by local restaurants might very well yield 'signature' menu items that would become year long cravings – and important icons of the fair." – Project consultant

### **Appreciating the value of a good reputation**

By institutionalizing standard business practices and modeling integrity, accountability, and prudence in all customer and contractual relations, fair organizations will gain reputations as reliable and desirable partners. Outside organizations have the expectation of a mutually beneficial experience – a "win-win" relationship – when considering whether to do business with a fair organization. A fair organization's reputation follows from its talents for and commitments to:

- Responsive problem solving.
- Mutually respectful alliances that form a business environment in which corporate sponsorships can flourish.
- Responsibility for all health and safety issues on the fairground and eliminating hazards in time for opening day of the fair.
- Year-round communication and consultation with health and safety regulators.
- Annual staff training in customer-friendly hospitality and service.
- Acknowledgment and appreciation for contributions of volunteers and partners.

### **FINDING THE MARKET OF OPPORTUNITY-SEEKERS**

Entities seeking opportunity to reach the market of fairgoers include a wide range of nonprofit and government organizations as well as private enterprise. The impetus for fairtime participation depends on each entity's purpose and goals. As opportunity brokers, fair organizations need to understand each potential partner's goals and then explain how participation in the fair would contribute toward achieving those goals. For example:

- Local organizations can use the annual fair as an opportunity to demonstrate their commitment to the community. The annual fair provides venues in a desirable context for these organizations to reinforce community awareness of their presence and purpose, promote their programs, and raise funds to support their service projects.
- Businesses can use the annual fair as both a sales opportunity and a chance to promote their own brand identity. As a gathering of large numbers of potential customers, the annual fair becomes a unique, once-a-year marketplace where interactions between businesses and fairgoers occur in an atmosphere of celebration. Individual businesses would find this hard to duplicate.
- Sponsors can use the annual fair as an opportunity to enhance market visibility. By providing access to the community at-large, the annual fair offers sponsors an opportunity to position themselves within the community as neighbors and good corporate citizens.

Several community members suggested that fair organizations pursue new business relationships and actively solicit new ideas and partners. Going directly to local businesses and asking what would attract their participation may lead to some surprising answers and new ways to work together.

### Contributing to local prosperity

As fully integrated community institutions and local businesses, fair organizations generate significant social and economic benefits for the community at-large. Ideally, the fair organization will not only generate significant economic impact but will also document its impact. Help in gathering and analyzing this information may be available from local college classes in economics, business administration, or marketing. In addition, the “CEO Report to the Board on the Annual Fair,” included in this book, will help fair organizations assemble pertinent data specific to fairtime.

#### Economic impact

“No one seems to know the value of the fair or other fairground activities. The fair organization needs to conduct an economic impact study to determine its worth and then communicate that information to everyone.” – Community stakeholder

Producing a great fair that attracts large numbers of fairgoers ensures that the fair and fairground will be perceived as having sustainable public and commercial value. Documenting the fair’s impact will encourage community support and lead to more expansive business partnerships. Such support helps to ensure the long-term financial stability of the fair organization.

## MANAGEMENT SPECIALIZATION

The emphasis on opportunity brokering raises important issues regarding not only the goals but also the management and personnel structures of fair organizations. The reinvention project team found that pilot sites frequently struggle with the competing resource demands of producing the fair, on the one hand, and managing the facility, on the other.

It is not necessarily the case that a person who excels in facilitating a community’s fair will also be a talented and skillful facility manager, or vice versa. If a fair organization expects compatible year-round use to generate enough revenue to keep the facility operating and regularly maintained and help offset the annual fair’s operating costs, it may be prudent to separate fair management from facility management. Recruiting specialized expertise for management of these two very distinct endeavors would likely enhance the fair organization’s effectiveness in both arenas. This separation of management responsibilities would also enable fair organizations to maintain a clear focus on the purpose and role of the fair.

The point of specialization in this case is to relieve fair organizations of the burden of facility management so they can better focus on their primary tasks of opportunity brokering and mobilizing the community to produce a great fair. Separating fair management from facility management does not represent a diminished role for the CEO. On the contrary, community mobilization and opportunity brokering will pay off in a big way only if the CEO and board are able to dedicate their best efforts to these two challenges.

Successful year-round facility management hinges on a number of purely practical considerations. Ideally, for example, fair organizations need to have the following:

- Attractive and functional facility in a desirable location.
- Facility management expertise, including marketing and maintenance.
- Knowledge of the market (users and other facilities).
- Access to capital improvement and investment funds.

It is possible, even without this ideal mix of resources, for intensive year-round use of the fairgrounds to produce enough revenue not only to cover the fair organization's costs but also to help finance capital improvements and offset costs of the annual fair. The cases in which resource-deprived fair organizations are able to pull this off, however, are rare.

#### Alternative models for ownership, management, and operation of the fair facility

**Model I** The fair organization is a separate agency or firm, owning no facilities and renting a facility to put on a fair. The facility would be owned, or managed under a long-term lease, by a separate operating organization, instructed to maximize profit by renting the facility within certain restrictions. The fair's rent, and the fair's prior claim to use the facility, could be specified by law or lease agreement.

**Model II** The fair organization continues to own the facility but its operation throughout the year is subcontracted to a private facility manager, instructed to maximize profit, perhaps under a percentage fee arrangement.

**Model III** The fair organization sets up a separate subsidiary to manage the facility. This model is similar to current arrangements but allows for greater internal distinction between the fair and the facility's non-fairtime use.

Source: Michael O'Hare and Hector Cárdenas, "Policy Alternatives for California Fairs" (California Department of Food and Agriculture, Division of Fairs & Expositions, 1996, consultant report).

Local conditions, possibilities, and preferences will determine which model, variant, or hybrid of the three models makes sense for a particular fair and community (see description of Models I, II, and III in box). The first step is for fair organizations and their communities to become clear about the stakes involved in the issue and then address them directly, openly, and explicitly.

In the end, the question is one of whether fair organizations can afford to allow the resource demands of facility management to detract from future development of the annual fair. More aggressive management and marketing of the fairground facility might be expected to yield greater revenue but, on the other hand, so might more aggressive management of the annual fair.



### Compatible uses and community “ownership” of fairground facilities

Whatever arrangement a fair organization selects for management of its fairground, an important ongoing consideration will be the selection of non-fair uses of the site that are compatible with the public purpose of the annual fair. Ideally, year-round uses will not only harmonize with fairtime use of the fairground but will actually amplify and reinforce the identity of the fairground as the site for the annual community celebration.

#### Year-round use of fairgrounds

“People who use the fairground and see the fair organization as a community-benefiting entity are more likely to attend and participate in the fair than those who know of it only as a fairtime organization.” – Project consultant

Compatible uses would include activities that attract and engage fairs’ target audiences. For instance, fair organizations could give space rental priority to businesses that offer training and apprenticeships to young people. Fair organizations could then expect these businesses to conduct demonstrations of apprenticed work during fairtime. Depending on the nature of individual enterprises, bartering with fairground tenants for services and products needed for production of the annual fair may also prove to be mutually beneficial.

Groupings of compatible year-round tenants might include:

- Arts: art studios and classes (visual, dance, music, theater), gallery and performance space, rehearsal and equipment storage, instrument repair, nonprofit arts offices and meeting space.
- Small business: flea markets, junior achievement projects, sign shops, and cabinet-making.
- Community organizations: office and meeting space for clubs, civic organizations, and nonprofit service agencies.
- Education and special interest groups: science fairs and other regional school competitions, hobby and craft clubs (gem and mineral, quilting, garden, woodworking, metalwork, ham radio, and so on).

One community stakeholder observed that the fair organization could “take an innovative approach to collaboration and ask for help in upgrading the fairground into a more versatile and comfortable place for community events.” Extending opportunities to effectively share ownership of the fairground could include the “adoption” of certain buildings or areas of the fairground; this would help the fair organization fund and manage building upgrades and landscaping improvements. Particularly in communities where few alternatives for public facilities exist, local groups and organizations may be eager to lend materials and labor to improve the condition of the fairground and buildings.

By harmonizing community activities into a compatible-use strategy and encouraging community investment in the fairground, fair organizations will integrate wise use of the facility with mobilization of the community to produce a great fair.



### Opportunity brokering and fairground management

Fair organizations can broker opportunities for show promoters (sponsors of public shows and events), to reach regional and niche consumer markets, by utilizing market research indicating the fair organization's market share and demographics. By the same token, fair organizations can use market research techniques to determine appropriate and competitive facility rental rates and set reasonable revenue goals for year-round facility use.

#### Year-round facility use: a rental schedule and break-even analysis

During the course of the reinvention project, the Imperial Valley Expo (IVE) contracted with Michael Phillips, a business consultant, to recommend a schedule of rental rates for all facilities on the fairground. Phillips contacted 15 people in Imperial Valley with real estate and space rental experience to gather information on rental prices as well as the going rates in the area for janitorial services. His objective was to determine rental rates for comparable facilities in the valley (which were limited) and, on that basis, to develop an average rental rate per square foot for IVE facilities.

In addition to the information gathered through this process, he also examined IVE's rental records to determine which former tenants had been the most profitable. He then estimated variations to take into account heavy usage, unusual or special circumstances, and unique facility characteristics. On the basis of this assembled information, Phillips recommended a rental fee schedule and developed a break-even analysis to estimate the number of days per month that IVE would need to rent the facilities in order to recoup its costs.

Components of the analysis included:

- Fixed costs are the minimum expenses that occur if the space is left idle. Such costs include ongoing maintenance to keep the space usable in the long run and pro rata administrative costs for management, legal services, and accounting.
- Variable costs represent the difference between leaving a space idle and using it at full capacity. The entire variable cost would apply if the space were used for 30 days per month.

Assumptions in effect for purposes of this analysis included:

- Overhead costs are allocated pro rata, based on square footage, because the entire fairground can be rented as a unit.
- Rental space availability is approximately 260 days per year.
- Total expenses are allocated at 80 percent to creating and operating the annual fair. The remaining 20 percent represents overhead for the rest of the year.
- Buildings and other spaces are already depreciated and will last indefinitely if properly maintained.
- Maintenance costs are calculated at market rates, which are higher than IVE's actual costs.

Calculation of the number of rental days per month required to break-even is based on Phillips's October 1996 recommended rental fee schedule, lowest daily rates (he also recommended that Saturday rental fees be 33 percent higher). The tables provided on the next page give examples of Michael Phillips's analysis.

## RECOMMENDED RENTAL FEES

## Examples

Facility/Size	Size	Rental per day	Add-on fees
Building A	16,200 square feet (180' x 90')	\$400	AC: \$100/day Janitorial: \$40
Building B	6,000 square feet (100' x 90')	\$250	Janitorial: \$25
Grandstand	2,000 seats	\$1,000 (net of equipment)	Lights: \$3/hour Janitorial: \$70
Entire fairground	N/A	\$2,800 - \$5,000	Varies with type of usage

## RENTAL SPACE BREAK-EVEN ANALYSIS

## Examples

Facility	Costs per month		# Rental days per month to break-even
	Fixed	Variable	
Building A	\$3,100	\$500	8.0
Building B	\$1,500	\$275	6.2
Grandstand	\$4,600	\$1,100	4.9
Entire fairground	\$18,500	\$3,500	7.1

The consultant's analysis resulted in creation of a baseline for estimating facility costs and setting facility use goals to ensure financial stability. It also confirmed that IVE could offer highly competitive rates in the local facility market without risking financial insolvency.

Source: Michael Phillips, letter to Deanna Marquart regarding interim rental rates, 1998.

The primary business activity of opportunity brokering gives fair organizations new ways to perceive the value of customer access and the participation of community organizations and commercial enterprise. In turn, communities gain new ways of perceiving the value of fair organizations as partners and as contributors to local identity and character. Revitalized community support and sustainable fiscal health hold promise for reinvented fair organizations to fulfill their public purpose well into the next millennium.

## Notes:

<sup>8</sup> "Primary disciplines" are values, principles or guiding influences that, taken together, comprise a mindset for success.

<sup>9</sup> "Merchandising" means selling items that display the fair's logo as brand identity.



## STATE & LOCAL OPPORTUNITIES

Today, California's 81 fair organizations face a challenge to their creativity. Responding to this challenge will be largely a matter of restoring fairs' original vitality while deepening their contemporary relevance. The path toward achieving this result lies in focusing on celebrating local community identity and character. But if fair organizations are to reach this goal, they will need help and support from state and local government agencies and other organizations in their local communities.

### OPPORTUNITIES FOR THE GOVERNOR AND LEGISLATURE

Since the passage in 1933 of the referendum on parimutuel wagering, public funding for California's network of fairs has come from wagering revenue at racetracks and, since the mid-1980s, also from revenue generated by off-site wagering facilities. Existing law defines fairs by naming them, and it requires organizations identified in the code as fairs to produce an annual fair event. Currently, producing an annual fair is the primary condition of funding eligibility.

The reinvention project findings suggest that fair organizations warrant government funding because they serve a public purpose. Specifically, by celebrating local community identity and character, fairs expand the experience of *shared* heritage among members of a community, even though their backgrounds may be quite diverse. By helping to create common ground, fairs can contribute to social stability, civic peace, and public safety. To the extent that public monies facilitate these important effects of a fair, funding from state government is clearly appropriate. The governor and legislature may want to clarify the relationship between public funding and public purpose by taking actions such as those described in this chapter.

#### Define "fair" and "fair organization"

The governor and legislature may want to enact the following statutory definitions:

- A fair is an annual event that celebrates local community identity and character through (1) exhibitions and/or demonstrations that showcase the accomplishments and talents of local community members (as individuals or in identified groups), and (2) fairgoer education regarding local history, industry, and civic issues. An event that meets this definition may include any other form of locally chosen education, entertainment, or commerce and shall still be defined as a fair.<sup>10</sup>
- A fair organization is any organization that (1) mobilizes its community to produce an annual fair, as defined above, and (2) is officially recognized by the board of supervisors in its host county as the fair organization, or one of the fair organizations, for that county.

#### Find out whether fairs make a difference

This report takes the position that participating in fairs' main event, the exhibits and demonstrations program – and/or volunteering to help produce the annual fair – has measurable impact. For example, findings from the reinvention project suggest that gaining experience with "culmination" instills an understanding that diligence and discipline pay off in accomplishments that bring individual recognition. In addition, direct involvement in producing a community showcase appears to engender awareness of and affection for the unique features of a community and instill pride in being a member of that community.



These are testable hypotheses. Therefore, the governor and legislature may want to direct one of state government's research offices to:

- Appoint and work with an advisory group of representatives from the network of California fairs, as well as experts in social science research.
- Conduct a study, in consultation with the advisory group, designed to measure the impact of fairs on social stability, civic peace, and public safety.

### ***Possible study approach***

One approach to conducting such a study might be to survey adults who, as children, produced entries for exhibit in their local fairs: ranging from at least one exhibit up to several (2 to 5 times, 6 to 10 times, or 11 or more times). The California 4-H Foundation has a database of names and addresses of approximately 4,000 California adults who were 4-H members as children. Randomly selected adults who lived in California as children and may have attended fairs but never produced an entry for exhibit would comprise a control group. It would be necessary to perform statistical analysis to estimate, for each indicator, the strength of fair participation as an explanatory variable.

### **Indicators of social stability**

Use of the following social indicators would provide a measure of social stability:

- Current membership in organizations as an indicator of participation in the infrastructure of community life.
- Leadership positions in organizations to which respondents belong as an indicator of willingness to assume responsibility for making sure things get done.
- Current county-of-residence as an indicator of forming lasting bonds with communities of origin.
- Marital status as an indicator of family cohesion.
- Records of law-abiding or criminal activity as indicators of respect for others and willingness to assume the role of responsible adult and citizen.

### **Investigate the need for fairground improvements**

Not every district agricultural association has its own fairground and some DAAs lease their fairgrounds from local government, but most DAAs manage state-owned fairgrounds and facilities. Fairgrounds are included in the Department of General Services' inventory of state property, but there is no current assessment of the condition or value of these facilities.

Fairgrounds throughout California serve as community cultural centers and important local resources. Most existing structures – which include grandstands, racetracks, exhibit halls, ticket booths, parking lots, and other types of facilities – were built in the 1940s and 1950s. Many of these structures have fallen into disrepair although not necessarily into disuse.

Over the past 15 years, California state government has become proactive in managing its real estate assets. Fairgrounds need to be included in the state's reinvestment planning. In the case of fairgrounds, this effort should include consultation with fair organizations and local governments and cooperation to pool resources for modernization and upgrading.

The governor and legislature may want to authorize and fund the Departments of General Services and Food and Agriculture to conduct a thorough analysis of the current repair and major maintenance needs of fairground facilities and prepare a 10-year capital improvement investment plan and strategy.





### **Authorize and fund a “teaching fair”**

The point of reinventing fairs is not to justify their existence. Nor would it serve anything more than self-interest merely to justify continuation of public funding for fairs. The compelling reason to reinvent fairs is to create the benefits for California communities of celebrating their local identity and character. Those benefits include enhancements in social stability, civic peace, and public safety.

As this book indicates, reinventing fairs is a complex, multi-year undertaking. Furthermore, the “new look” of fairs is still evolving. It will take time and experimentation to continue the process of deepening the contemporary relevance of these tradition-laden events.

While most fair organizations receive many suggestions from community members for program improvements, concession changes, and new contest ideas, they may have a somewhat cautious view of innovation when it comes to adopting new ideas. Fair organizations tend to be risk-averse, in part because their operating margins are rather slim. Fairtime revenue constitutes a very high percentage of total annual revenue – more than 90 percent for some fair organizations. Fair organizations on the high end of this spectrum are naturally reluctant to put their primary revenue source at risk. Indeed, it would not be prudent for them to do so.

However, declining market share, indicated by attendance as a declining percentage of local population, suggests that experimentation and innovation are critical to fairs’ survival and thus to their ability to fulfill their public purpose. A teaching fair that tests new programming and promotions ideas to determine the strength of their appeal in various markets around the state would identify innovations that have high popularity ratings among fairgoers. It could also then provide implementation advice and assistance to fair organizations interested in modernizing their fairs by adopting these market-tested innovations.

The governor and legislature may want to enact legislation to authorize and fund the development of a “teaching fair.” By assuming the costs and other risks associated with testing new ideas in fair programming, this state-funded and state-operated institution could identify and promote new ways to help California communities recognize and celebrate their local identity and character. The teaching fair would also serve as a leadership training and management apprenticeship institution for fair managers, staff, and board members.

### **Respect the fundamentally local accountability structure of fairs**

In the modern era, liability is a thorny legal issue for everyone, not just fair organizations. In the particular case of DAAs, the state can be held liable for business decisions these institutions make at the local level. In these circumstances, Fairs & Expositions cannot fully delegate administrative authority to DAAs without jeopardizing the Fairs & Exposition Fund (the source of public support for *all* fair organizations in the California network).

DAAs’ receipt of state funding should not make state government liable for DAAs’ business decisions any more than county fairs’ and private nonprofit fair organizations’ receipt of state funding makes state government liable for *their* business decisions. Therefore, the governor and legislature may want to enact legislation to clarify that DAAs are local institutions, accountable to their communities, and that state government is not responsible for the consequences of DAAs’ business decisions and actions.



## OPPORTUNITIES FOR FAIRS' LOCAL STAKEHOLDERS

Originally, the reinvention team could not have envisioned that the final report on the project would be addressed in part to fairs' community stakeholders. Only after the process had begun did it become apparent how important it was to mobilize the community to produce a great fair. A great fair is the result of the *partnership* between the fair organization and the fair's stakeholders. Unless both the fair organization and other institutions and groups in the community become and remain mindful of this fact, the fair will fail to meet its public purpose.

It may be obvious that the parties responsible for producing a great fair include but also extend beyond the fair organization, but fair organizations sometimes tend to be possessive of "their" fairs. When they fail to practice inclusiveness, even if only in their use of terminology, fair organizations do not convey an attitude of invitation to the community as a whole. Nevertheless, a fair's stakeholders must also do their part to *claim* the fair and *make* it theirs.

The fair organization's role, as described in this book, is to shoulder the burden for facilitating and mobilizing an exciting and engaging community showcase and celebration. But the words themselves – community showcase and celebration – denote an event and institution that by definition *rely* on the participation of community members not only for their success but for their very existence.

### How local governments can help

City and county government officials can open dialogue with fair organizations to discover mutually beneficial opportunities to plan and implement community development activities and programs. Fair organizations' institutional capacity for community mobilization may help government officials dramatically increase the impact of their own attempts to engage local residents in exercising their rights and responsibilities as citizens. Where relevant, local dialogue may include exploring options for transitioning a district agricultural association into a locally controlled organizational form.

With the community's support, local government officials can also dedicate public resources to support operation of the annual fair. Support might include, among other things:

- Providing shuttle buses to and from remote parking lots.
- Offering traffic control expertise to minimize traffic jams and train fairtime staff.
- Supporting advance ticket sales by including the fair's promotional materials with routine mailings.
- Making sure that pre-fair health and safety inspections are timely.

### The facility

A deteriorating fairground reflects poorly on the community's pride and self-esteem. Local government's attention and participation may be necessary to stimulate public awareness of this problem wherever it exists, as well as to help the fair organization mount a capital improvement fundraising campaign.

### How schools can help

Schools can open dialogue with their local fair organizations in partnerships to expand the educational opportunities for students. If the current dates for the fair prevent full collaboration, schools may want to discuss options with the fair organization and explain which dates would ensure greater student participation.<sup>11</sup>





As discussed throughout this book, fairs can potentially play a significant role in smoothing the path from childhood to adulthood. This challenge is one they clearly share with schools. Schools throughout California can safely view fair organizations as natural allies and partners in bringing their communities together to recognize and meet the needs of children and youth. At best, this report will inspire many creative new alliances in service to families and children. Potentially, the alliances between fair organizations and schools are particularly powerful.

More specifically, schools may want to cooperate with fair organizations to coordinate exhibits and events that add showcasing opportunities for individual and group student achievements. For example, fairs are potential venues for *re*-exhibiting the best science fair entries or *re*-presenting the best musical or drama productions. Fairtime contests among school athletic teams represent an additional option for building on the impact of experiences students have in school.

### ***Community needs and opportunities assessment***

In interviews over a three-year period, the reinvention project team repeatedly heard from community members of their frustrated efforts to help children and youth. Schools could make an enormously valuable contribution to the life of their communities by spearheading a collaborative effort to define and measure the most pressing needs of children and youth in the community. This effort could identify facilities and organizational strengths that may currently be underutilized but which, if optimized, might produce major improvements in the quality of life for local youth. Fair organizations would be ideal partners for such an effort.

### **How community organizations can help**

A broad range of organizations are involved throughout California in community development and improvement. Strategic alliances between these entities and fair organizations would help all participating parties reach their individual and shared goals. The types of organizations suggested below clearly do not exhaust the possibilities.

#### ***Arts councils***

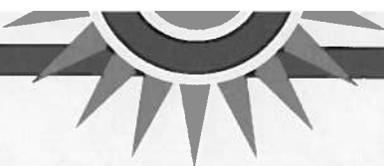
Arts councils share fair organizations' need to build new audiences. Finding ways to reach this goal for both fairs and arts in the fair venue will pay off for both. Be open to new ideas and innovative collaborations. Share resources and information about common goals that could be met at the fair.

#### ***Ethnic and cultural organizations and neighborhood associations***

Local groups organized for the purpose of increasing recognition of cultural traditions and special needs of diverse cultures will find that fair organizations have expertise and experience that can be helpful in producing new showcases for specific groups. In this regard, the fair organization can provide assistance with forming a committee for the purpose of producing and presenting entries and/or demonstrations at the fair.

#### ***Seniors***

Organizations that support the interests of seniors may want to help their communities become and remain supportive environments for older Californians by seeking help from local fair organizations to inform residents about contributions made by seniors to an improved quality of life for everyone. Ask the fair organization to respond to the special needs of older fairgoers that will make their fairgoing experiences more comfortable and rewarding. For example, the fair organization may need to be reminded to use big print in the production of program schedules and fairground maps and to provide plenty of shaded seating throughout the fairground.



### ***Service clubs and civic organizations***

Community service organizations can partner with the fair organization to increase fairgoers' awareness and understanding of quality of life issues in the fair's multi-county region and introduce new residents and tourists to prevailing views surrounding those issues. The fair organization can help service clubs to prepare civic issue exhibits (displays, reading materials, photographs) and events (well-rehearsed debates, speeches by trained orators, public forums moderated by skillful facilitators) that will provide information to individual citizens about what they can do to help solve the community's problems.

### **How businesses can help**

One of the ways that businesses can support their own employees *and* the fair is to encourage employee participation in organizing fairtime exhibits and activities in which both the employees' families and the businesses themselves have an interest. Authorizing time on the job for employees to participate in planning and preparing for the fair would make a contribution to employees' ability to sustain a meaningful family life and generate goodwill toward the business.

Find out what the fair organization needs for successful production of the fair and offer to provide those necessary goods and services – as a donation, if possible, or at reduced prices. Indicate an acceptable form of recognition the fair organization could provide in exchange for the offer of goods or services.

Commodity marketing organizations that represent locally grown agricultural products may want to sponsor exhibits and demonstrations and sell their products on the fairground during the fair.

### **How individuals can help**

People who feel a longing to be part of a great fair owe it to themselves *and* their communities to begin or continue participating. Individuals can make a difference in the quality of their local fairs through various forms and levels of participation. For example:

- Enter an exhibit.
- Volunteer to serve on a committee that is assuming responsibility for a particular aspect of the next fair.
- Attend public forums sponsored by the fair organization and participate in productive dialogue regarding how to improve the fair.
- Help institute and advocate for changes to the fair and fairground that support the fair organization in its mobilization and facilitation of a great fair.
- Advise local government officials to dedicate at least modest amounts of locally generated public funding to maintenance and upgrading of the fairground and fair facilities.

#### Notes:

<sup>10</sup> Options for introducing new and innovative elements in fair programming are restricted only by standards for inclusiveness, namely that the fair organization must develop methods and materials that encourage people from all segments of the community to participate in creating the community's showcase. Participation may include preparing an entry for exhibit or volunteering in other ways to support production of the fair.

<sup>11</sup> Changing the dates of an annual fair requires careful planning to avoid conflicts with other fairs, other community events, and terms of existing vendor contracts.





## NEW DIRECTION FOR THE DIVISION OF FAIRS & EXPOSITIONS

As long as fair organizations receive state funding, state government will play a role in the fair business. However, the role of Fairs & Expositions is transformed by the post-reinvention understanding that the public purpose of fairs is to help residents of a given geographic area recognize, understand, strengthen, deepen, and celebrate that particular community's identity, character, and way of life. Specifically, this understanding dictates that state government is no longer concerned with just a fair organization's compliance with the rules governing expenditure of public funds. In the future, Fairs & Expositions must balance legitimate fiscal concerns while at the same time encouraging fair organizations to aim high in order to fulfill their public purpose.

### AFTER REINVENTION

The reinvention project clarified that any fair organization's primary relationship is with its own community, and not necessarily with any specific industry such as agriculture or state government. The post-reinvention view of a fair organization is that it is both a community institution and a business. In this view, managing events and facilities to serve the interests of other community organizations is the fair organization's business function, but meeting the public purpose of a fair goes straight to the top of any fair organization's list of responsibilities and justifies its structure as a public institution.

The fair organization's *public* function is to mobilize the community to produce a great fair in celebration of local identity and character, while the fair organization's *business* function is to broker the event's broad appeal and its own event and facility management capabilities in order to create and enhance business opportunities for other organizations and businesses.

### Mission of Fairs & Expositions

The post-reinvention mission statement of Fairs & Expositions is, "We serve the public by facilitating the best use of funding, oversight, and other services to advance the success of California's fairs." To live up to that mission, Fairs & Expositions may need to:

- Emphasize quality of the annual fair as pivotal to any fair organization's success in mobilizing its community to produce a great fair.
- Gain experience with performance measurement and help fair organizations document their effectiveness so that they can be truly accountable for fulfilling their public purpose.
- Provide training and consultation to fair organizations to enhance their community mobilization skills and to strengthen their business practices.

### REINVENTION-INSPIRED IMPROVEMENTS

Point-by-point, the post-reinvention view of fair organizations may seem to represent only subtle changes. Taken as a whole, however, the understanding of fair organizations as community institutions, not state institutions, that serve a specific and definable public purpose, rather than simply providing entertainment, will have profound implications for the future of the relationship between state government and fair organizations. Fairs & Expositions will need to redesign its functions and activities to reflect this post-reinvention perception. Performance measurement, training, and information distribution will be the likely places to start.



### **Performance measurement**

Starting with the state's strategic planning requirement, which fair organizations will be expected to meet for the first time in November 1999, submittal of fair organizations' performance measures could play an important role in setting the stage for emergence of the post-reinvention Fairs & Expositions.

One way Fairs & Expositions can support fair organizations' efforts to enhance the quality of fairs is to create funding incentives for performance.<sup>12</sup> This approach would require Fairs & Expositions to redefine its oversight role. Traditionally, Fairs & Expositions has determined compliance or noncompliance primarily by monitoring paper trails. These procedures have the advantage of standardized application to all fairs, but their weakness is that they bear little or no relation to the quality of a fair.

In a post-reinvention world, the residents and institutions in each fair organization's local community will need to establish the quality standards for a fair. In this scenario, it would be neither feasible nor appropriate for Fairs & Expositions to promulgate objective and quantifiable measures for fair quality and apply them across the board with the acquired force of regulation to every California community.

What Fairs & Expositions can do is encourage individual fair organizations to develop objective and quantifiable quality measures that are responsive to their communities. To support fair organizations' success in this practice, Fairs & Expositions can design and craft a system that measures performance against each fair organization's own targets for quality improvement as the basis for funding.

Successful implementation of such a fundamental change in the basis for fair funding would entail extensive consultation with the network of California fairs to develop appropriate standards and procedures. Some fair organizations may also appreciate assistance with initial development of quality measures for their annual fair and effectiveness measures for their organizations. The tools in this book identify at least some of the readily quantifiable quality measures of a great fair.

### **Training**

Fairs & Expositions expects some CEOs, staff, and board members to seek training in methods and strategies for implementing the recommendations and using the tools in this book, especially as they relate to performance measurement. Meeting this demand will require an annual evaluation of the resources required. Fairs & Expositions' annual expenditure plan will reflect this demand as expressed by fair organizations' requests for training.

### **Information distribution**

Another way that Fairs & Expositions can "advance the success of fairs" is by analyzing performance measurement data and producing and distributing periodic reports on quality improvement throughout the network of California fairs. Providing annual aggregated statewide data would set benchmarks for the network as a whole and allow individual fair organizations to target their own performance goals on an annual basis.



## REORGANIZING DAAs AS LOCAL INSTITUTIONS

Fair organizations can best fulfill their charge to mobilize celebrations of local community identity and character as *local* rather than *state* institutions. However, putting the three basic operating principles into practice will be more difficult for DAAs because they have evolved as part of the structure of state government.

In general, the structures and procedures for accountability imposed on state institutions force DAAs to be more bureaucratic than fair organizations need to be. Through reinvention and other research projects, Fairs & Expositions and a few DAAs have been working to identify options for transitioning from the current governance and oversight structure into alternatives that support both the public purpose of fair organizations and their business success.

Fairs & Expositions encourages DAAs to reorganize as local institutions wherever this option makes sense. When the vision, initiative, and commitment required to ensure success originate on the local level, the governor and legislature have demonstrated a bipartisan willingness to support this transition. For example, legislation passed in 1998 [Chapter 259, Statutes of 1998 (SB 1486, Mike Thompson)] made the following changes in state codes pertaining to DAAs:

- Authorized a new nonprofit organization, in lieu of the 25<sup>th</sup> DAA, to hold an annual fair in Napa, California.
- Authorized the Department of General Services to lease the premises known as the Napa Valley Expo to the new entity for less than market value.
- Provided that the 25<sup>th</sup> DAA shall be deemed inactive for the duration of the 99-year lease period.
- Permitted civil service employees of the 25<sup>th</sup> DAA to decide whether to continue employment as state employees or as employees of the new nonprofit organization.
- Provided that the new entity may choose to remain a member of the network of California fairs on terms and conditions mutually agreed upon by the new nonprofit organization and the Department of Food and Agriculture.

Note:

<sup>12</sup>Traditionally, fair organizations have received "base allocations." Originally, they used these annual grants to pay cash awards, or prizes, to fair participants. In California, the amounts available have been sufficient to offset overall operating costs as well. For many years, the specific amounts were set in statute. More recently, the amounts have varied in five different funding levels, depending on fair classification, which is basically a reflection of budget and staff size.





**PART THREE:**  
**CASE STUDIES**







## THE MULTICULTURAL FAIR

The Gold Rush drew newcomers to California from around the world, but the state's riches go beyond minerals that lie beneath the soil. California's natural beauty, climate, social tolerance, and humming economy have long been siren calls to other Americans as well as to immigrants. At 33 million and growing, however, the blush is sometimes off the rose. Our diversity often confounds and sometimes divides and frightens us. The multicultural fair is a bridging resource that our state can put to good use in bringing together all Californians in search of common ground.

By mirroring the multicultural dimensions of its own community, any fair organization can mobilize participants to produce a great fair. Through celebration of traditions, local cultures, art forms, and other distinguishing characteristics, community members can come to know each other as fairgoers and, in these relatively friendly circumstances, develop mutual respect and regard.

### **CALIFORNIA MID-WINTER FAIR: A CASE STUDY**

In 1994, the Division of Fairs & Expositions selected the California Mid-Winter Fair (CMWF) in Imperial County as one of three fairs to participate in the state-supported reinvention pilot project.

The selection committee viewed multiculturalism and business development as highly appropriate issues to address within the scope of the reinvention project, given the relevance of these matters to California fairs statewide. Situated in a border county with a rapidly changing demographic mix and on the brink of NAFTA-driven economic growth, CMWF posed an irresistible and timely challenge.

The Latino population in Imperial County had grown to nearly 50 percent of the total by 1990 (see Table 2, "Demographic Changes: California and Imperial County"). Approval of NAFTA in 1994 was expected to blur the significance of the border between California and Mexico, at least for purposes of trade, and CMWF recognized that new levels of cultural exchange would not be far behind. These conditions suggested that new opportunities were on the horizon for the fair organization and fairground. CMWF was especially interested in serving as a center for multicultural events and international trade exhibits.

This case study describes the experience of the CMWF in Imperial County in reinventing the annual fair as a multicultural event. It includes background information pertinent to the community identity and character that led to CMWF's decision to pursue this course as well as a brief account of the activities undertaken to put their decision into action. The multicultural fair planning guide and checklist at the end of the case study grew out of CMWF's efforts and experiences to-date and provides a framework for carrying out these activities.

#### **Outcome**

Two important barriers to realizing CMWF's goals to serve as a year-round center for multicultural events and international trade exhibits gradually came into sharp focus:

1. While a window of opportunity seemed to exist to redevelop the fairground as a state-of-the-art trade center, developing sufficient levels of political and funding support required CMWF to become the initiator of coordinated economic development planning.
2. California Mid-Winter Fair's reputation as a lively and engaging showcase for life in the Imperial Valley had been in decline for many years. Consequently, the fair organization was not an institution recognized for leadership in community event management, much less for the formation of partnerships to advance the region's prospects for international trade.



CMWF came to understand that its credibility as a prospective partner for new activities rested on its ability to produce a great fair consistently. The fair organization had first to demonstrate its competence and expertise in fulfilling the purpose for which local people had originally created it before anyone would welcome and feel confident in CMWF as a partner in a high stakes joint venture.

With this redirection, CMWF began to look to the rapidly changing demographics in Imperial County as an opportunity for CMWF to fulfill its public purpose as a fair. Celebrating local identity and character in this border community meant preparing to welcome and showcase a new majority: Latinos.

By definition, change threatens the status quo. Shifts in programming emphasis threatened to alienate those who felt the greatest degree of fair ownership unless the fair organization managed an inclusive process of participation that made room for everyone. The reinvention of CMWF as a multicultural fair was not without its bumps along the way, and at the conclusion of Fairs & Expositions' reinvention project it remained a work in progress.

### **Situation analysis**

The reinvention project team conducted an initial organizational assessment of the CMWF in December 1994. Specifically, this included attention to the fair organization's operating environment, community attendance at and support for the annual fair, economic status, and condition of the facility.

### ***Operating environment***

Structurally, CMWF existed and operated as the 45<sup>th</sup> District Agricultural Association (DAA). As in any district agricultural association, CMWF board members served staggered four-year terms as gubernatorial appointees. At CMWF, the nine directors seated when the reinvention project began included five farmers, two bankers, a commercial developer, and a former teacher. Though the directors were individually viewed as community leaders and power brokers, as an entity the fair board was not looked to for community leadership.

Primarily, CMWF's board members were engaged in the fair organization's daily operations. From staff hiring and supervision to contract management in program areas such as livestock and entertainment, CMWF directors viewed their hands-on involvement in fair planning and programs as an asset that improved the fair organization's bottom line.

Vision. Board members' involvement in day-to-day operations helped the short-staffed fair organization meet its basic obligations, but it also inhibited CMWF's ability to focus on planning long-range strategies to improve the physical plant and increase revenue from new sources. CMWF held an annual post-fair evaluation meeting, but did not routinely engage in annual planning or strategy retreats.

Fiscal condition. CMWF addressed a major operating deficit of \$240,700 at the end of 1991 by implementing extreme cost-cutting measures and increasing the adult fair admission price by 25 percent. These changes reduced the deficit to \$37,000 by the end of the following year. But, by 1994, inclement weather cut paid attendance by 24 percent, and the deficit rose that year to approximately \$70,000. Further cost cutting ensued.



After the 1994 fair, CMWF essentially padlocked the facility from Memorial Day to Labor Day, laying off the maintenance workers for those months. The board hired a property management company to put on car races and car shows (in return for a percentage of profits) and directed the CEO and business assistant to reduce their work hours and dedicate their time exclusively to producing the next fair. Cutting expenses in this way reduced the deficit, but it also impeded revenue enhancement, depleted the organization's capacity, and contributed to the facility's decline.

**The annual fair**

The annual California Mid-Winter Fair spanned ten days in early March, after the late winter harvest and before the onset of high temperatures. Though the fair was well attended, a steady percentage decline of the total county population in attendance at the annual fair had been taking place throughout the 1990s.

(See Table 1.)

Table 1

**CALIFORNIA MID-WINTER FAIR  
FAIR ATTENDANCE: 1991 – 1994**

	Paid		Complimentary		Total	% Change	Total attend. as % of county population
	Number	%	Number	%			
1991	71,271	52%	66,872	48%	138,143	—	119%
1992	73,631	53%	64,272	47%	137,903	-0.17%	113%
1993	81,609	56%	63,613	44%	145,222	5.31%	111%
1994	66,668	51%	63,113	49%	129,781	-10.63%	97%

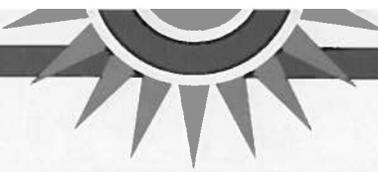
SOURCE: Lewis Ridgeway, CPA, Financial Analysis, 45<sup>th</sup> District Agricultural Association.

Overall, competitive exhibits were also declining, but 4-H and FFA student projects remained strong. Junior livestock was the focus of the annual fair and the core of its meaning to traditional supporters and participants. "We need the fair if for no other reason than to have the junior livestock show," noted a long-time resident and farmer. "There are two fairs here – the one that happens in the barn area and the other one on the midway," said one adult volunteer. "They don't have much to do with each other."

**The facility**

The CMWF paid Imperial County a nominal amount pursuant to a long-term lease agreement for use of the county-owned fairground located on the outskirts of the City of Imperial. The rectangular 132-acre fairground was adjacent to the county's main two-lane highway and within one mile of El Centro, the county seat and largest city in the valley. Neighbors included the Imperial Irrigation District facility, the county airport, the community college, light industry, small retail establishments, and residential housing. Five miles south of the fairground, the highway connected with the interstate freeway linking San Diego (100 miles west of Imperial) to Yuma, Arizona (40 miles east).





**Structures.** Beige buildings and a large grandstand comprised the narrow, rectangular complex that received the heaviest use. Constructed in the 1940s and 1950s, five exhibit halls of various sizes and conditions contained a total of 90,000 square feet. Only two of the buildings had heating, air conditioning, and overhead sprinklers. Restrooms and kitchens needed upgrading and modernizing.

With a few exceptions, most buildings were only used during the annual ten-day fair. A local gem and mineral club that met year-round and produced an annual fairtime exhibit was one long-term tenant; another was the indoor youth hockey team that met in a large hall for weekly practice.

In the early 1990s, and in response to feedback solicited from the community, the fair organization mounted a campaign to raise funds and recruit volunteer labor and materials to renovate a small exhibit hall. With the resources marshaled, CMWF undertook the renovation in a popular design style and renamed the remodeled building the Plaza de la Culturas. CMWF's original vision was that the building would serve as a multipurpose venue – suitable as a year-round social and cultural center for Imperial Valley and northern Mexico. The early plans included a kitchen and cantina area, but the financial resources were insufficient to meet these construction goals.

**Neutral turf.** Overall, the 1994 CMWF fairground was run-down, dusty, and uncomfortable, but it had one significant advantage – its central location. Community representatives from throughout the county consistently referred to the fairground as “neutral turf.” This quality of neutrality was important in a region where the founding seven cities nursed a friendly but serious rivalry of long-standing.

### ***Local identity and character***

In the late 1800s, promotional literature touting Imperial Valley as America's last frontier drew newcomers from around the globe to farm the newly irrigated desert. Among those settlers who heeded the call were Japanese, Chinese, Hindu, Swedish, Irish, Scottish, Filipino, German, Italian, African, Latino, and Swiss. The local Pioneers Museum showcases these twelve distinct nationalities as early settlers and founding families. Prior to this influx, Native Americans and Mexicans had inhabited the arid region.

**Population growth.** The two decades between 1970 and 1990 saw a boom in the entire state population from about 20 million in 1970 to nearly 30 million in 1990, an increase of 49 percent. In 1990, the total population of Imperial County remained small relative to other counties at 109,000, but it had grown a whopping 350 percent from 1970 to 1990.

Simple growth alone, at this rapid rate, would be difficult for any community to absorb and accommodate. But the population surges in Imperial County had also created an entirely different cultural and ethnic mix. In 1970, there were more Native Americans in Imperial County than all other races, which would have included all Latinos. By 1990, there were twice as many Native Americans as there had been in 1970, but the Native American percentage of the population had dropped, and the “Hispanic Origin” population had grown to 65 percent of the county population.<sup>13</sup> (See Table 2, “Demographic Changes: California and Imperial County,” page 67.)

**Transborder life.** Surrounded by arid desert and unpopulated mountains on three sides, the vast checkerboard of green and gold fields in the southeastern corner of California was home to 109,000 people in 1990 who relished the rural atmosphere and isolation of Imperial County. On the fourth side of the valley, across the international border, perhaps as many as one million residents of Mexicali, the capital of Baja, California, enjoyed the symphony, theatre, and museums of a culturally advanced and lively city.



**Table 2**  
**DEMOGRAPHIC CHANGES: CALIFORNIA AND IMPERIAL COUNTY**  
 1970 TO 1990<sup>14</sup>

	CALIFORNIA			IMPERIAL COUNTY		
	1970	1990	% Change	1970	1990	% Change
African American	1,400,143 7.0%	2,110,700 7.1%	+51%	520 2.1%	2,573 2.4%	+395%
Asian <sup>15</sup>	522,270 2.6%	2,747,780 9.3%	+426%	653 2.7%	1,752 1.6%	+168%
Native American	91,018 0.5%	196,889 0.7%	+116%	769 3.2%	1,527 1.4%	+99%
White	17,761,032 89.0%	17,093,961 57.4%	-4%	21,714 89.5%	32,016 29.3%	+47%
All Other <sup>16</sup>	178,671 0.9%			603 2.5%		
Hispanic Origin		7,557,550 25.4%			71,365 65.3%	
Non-Hispanic Origin Other		53,141 0.2%			70 0.1%	
<b>TOTAL</b>	19,953,134 100%	29,760,021 100.1%	+49%	24,259 100%	109,303 100.1%	+350%
Median Age						
Male	27.0	30.6		26.2	27.8	
Female	29.1	32.7		24.7	29.6	





Every day, approximately 30,000 workers and tourists, shoppers and business people, students and families cross the Imperial County border between California and Mexico. Many Hispanic-American families spend weekends in Mexico, returning to their U.S. homes for the workweek, while Anglo residents shop in Mexicali throughout the week.

Local economy. Known as California's "salad bowl," Imperial County was the second-highest agricultural producer in the state. It owed this bounty to historic rights to a reliably abundant supply of water from the Colorado River and a ready supply of cheap farm labor from Mexico. The temperate climate supported multiple crop cycles of a wide variety of produce, though winter vegetables and alfalfa were the county's primary crops.

Prisons built at each end of the county in the early 1990s had brought economic growth and new "outsiders." The drug trade across the border worried local residents and threatened the valley's insularity and sense of safety. Land values were higher in uses other than agriculture. Corporate farms were displacing the tradition of small family farms. The philosophical commitment to retaining an agrarian lifestyle and culture would prevail only to the extent that public and private cooperation succeeded in managing growth and development.

### **CMWF's multicultural fair strategy**

The findings of the reinvention project team that led to the board's decision to focus, first and foremost, on reinventing the annual fair were often difficult for the CMWF board of directors. The status quo was comfortable. Engaging in a proactive assessment and exploration of new options was not easy. For one thing, much of the information they received was less than favorable; for another, members of the board often had differing viewpoints about the significance of findings or how to respond to them. To add to their burden, midway through the project the organization faced the difficult transition of losing a long-time CEO and acquiring a new one. To some degree, the board arrived at the decision to pursue a multicultural fair strategy by default. It proved to be a decision, however, that would drive the organization's best prospects for long-term success.

### ***Identifying the need***

Economic growth in Imperial County seemed destined to follow on the heels of the newly-enacted NAFTA in 1994. Product shipping and international trade activities were seen as the most likely initial developments, and developers anticipated a residential and retail construction boom. If the economic effects of NAFTA unfolded as projected, there was every reason to expect CMWF to benefit and the excitement of that prospect was as heady for the reinvention project team as for the fair organization.

Trade consultants identified several exciting NAFTA-related possibilities, which depended on CMWF's capacity to find funding partners. Among them were developing the fairground as a trade center, featuring high quality exhibit and conference facilities; business support services in the areas of transportation and storage; and serving as a clearinghouse for international trade information. The consultants also suggested development of a quality hotel and golf course, given foreign investor interest in high-end corporate services. Because a state institution would have great difficulty justifying and driving economic development of this magnitude, the project consultants even proposed the creation of a joint powers authority with the county.



The success of these proposals depended on a collaborative political profile, an aggressive orientation to the future, marketing savvy, and recognized community leadership. However, interviews conducted with community, business, and political leaders revealed the following perceptions of CMWF:

- The fair organization had no direct relationship to the community outside of the annual fair, which was positioned primarily as a service to youth education organizations, such as 4-H and FFA.
- The fair reputation as a not-to-be-missed community event had been on the decline for many years.
- Business, community, and political alliances were absent, save participation in the fair as exhibitors or patrons.

Without a reputation for quality and without vitally important alliances, CMWF simply was not a logical or desirable partner for the high stakes venture that redevelopment of the fairground would have entailed. In 1996, CMWF's board of directors acknowledged that the organization was not yet ready to pursue the proposed NAFTA-related development opportunities. It recognized that its credibility as a prospective partner for new activities rested first upon cultivating a reputation for successfully fulfilling the purpose for which it was created.

### **CEO transition**

By 1996, CMWF's CEO had served for nine years when a team of consultants visited the annual fair as part of a reinvention project study. In April of 1996, when the study report was published, both the CEO and the board were startled by all that the team identified as opportunities for improvement. Clearly a great deal of hard work was ahead. After some soul-searching, the CEO recognized that the work ahead would require more energy and a greater degree of dedication than she was prepared to commit.

By August, the board appointed an interim CEO who had most recently been a Western Fairs Association, Fair Management Trainee. This first-time CEO was eager to gain experience. She accepted the position with the mutual understanding that she would implement the recommendations of the reinvention project and that she did not expect to make a career of the position. It was a good match of energy and enthusiasm to task.

### ***Building alliances***

After the fair in 1996, the board identified an expansion of the annual fair into a multicultural event as an opportunity to build participation and life back into the county's main event. This required the development of new alliances with segments of the community that the organization had largely ignored as a source of fair participants: the transborder Latino community.

In order to assess the Latino market and the opportunities and barriers CMWF would face in developing a multicultural fair, the board chose to work with a San Diego-based firm specializing in Latino marketing and communications.<sup>17</sup>

Assessing the market. With assistance from the consultant, CMWF gathered preliminary insights about the fair and community dynamics through interviews with community and business leaders in Mexicali and the California side of Imperial Valley.



First, they considered the local Latino community to be comprised of two distinct markets: Imperial County residents and Mexicali Latinos. Latino residents of the California side of Imperial Valley spanned the economic spectrum. Traditionally hard working and family-oriented, they had good relationships with the Anglo community and strong ties to Mexicali. In general, they believed that the fair had declined in quality and value. They spoke of having a sentimental attachment from childhood but no current loyalty and noted that, although the fair once served as a positive community influence, current perceptions were increasingly negative.

Mexicali residents were generally characterized as either very rich or very poor, with a strong sense of community and “*tienen la fiesta en la sangre*” or “fiesta [party] in their blood.” However, Mexicali residents revealed no emotional attachment to the fair and little interest in attending. Instead, they expressed attachment to the annual “Fiesta del Sol” held for several weekends in a large park in Mexicali and for which they paid several pesos per person (approximately \$1) to attend.

Low wages and high unemployment in both market segments presented a particular marketing challenge. For a family of five, it was quite possible to spend over \$100 in one day at the California Mid-Winter Fair on parking, admission, food, drinks, and carnival rides. With a larger family group, the cost could become even more prohibitive. While the opportunity for family recreation had cultural appeal for Latino families, the fair would have to offer a unique and particularly appealing experience to compete for limited discretionary dollars.

Active outreach. The next step was to build relationships with influential Latino business and organization leaders who could help the fair organization recognize and meet the needs of identified markets. CMWF met with community leaders on both sides of the border. The meetings were casual and friendly. Their purpose was to promote positive changes at the fair and to ask for commitments to participate and assist with promotional efforts.

Two dangers were present in proceeding with this strategy. One was that the people whom the fair contacted would perceive the fair organization to be more interested in attracting the Latino market’s dollars than actually developing fair programming of interest to the Latino community. If the organization promoted itself as interested in producing a celebration for all county residents, the pressure would be high to deliver on that promise. Otherwise, CMWF would damage new and tentative relationships.

The other danger was that singling out one group of county residents would offend other ethnic groups in the valley, particularly those who felt the greatest degree of ownership in the traditional fair. This danger was particularly apparent and compelling to the board of directors, many of whom had originally sought their board appointments with a particular interest in preserving these traditions. On one hand, outreach could be successful only if it resulted in real change; on the other, real change threatened to alienate the fair’s traditional audience.



### *Creating a showcase*

The 1997 fair was different from prior fairs. It demonstrated new efforts to reflect what the fair organization had learned about the community and how the community wanted to celebrate itself.

Changes from the prior year. The board made its highest profile change in order to clearly convey its intention and commitment to promote a new era of inclusiveness. It chose to add the word “Fiesta” to the fair’s name, making it the California Mid-Winter Fair & Fiesta (CMWFF). A consultant developed a new and colorful logo incorporating elements of Imperial Valley’s natural environment and the new name. Specific strategies for its use included application of the logo to promotional materials, fairground buildings, equipment, trash cans, benches, and signs.

The fair organization gave bilingual posters, press releases, and other promotional materials to organizations that had agreed at outreach meetings to distribute them for the fair. Thus, local chambers of commerce, cultural organizations, and social clubs distributed them throughout the county. For the first time, the fair organization also placed advertisements for the fair in Spanish language radio, television, and newspapers.

The formerly monotone beige fairground came alive with turquoise, magenta, orange, and yellow accents in keeping with the new colors of the logo. The fair organization exchanged nonprofit booth space rental fees for paint donations that were used to spruce up building exteriors, stages and backdrops, benches, tables, sign posts, and flower planters throughout the fairground. Prior community input had also indicated that fairgoers wanted shady places to rest, so, the fair organization responded by providing tent awnings, benches, and tables throughout the grounds.

Local vendors and organizations were encouraged to provide hands-on educational elements to their booths and exhibits, which resulted in more participation and family learning opportunities. To make the fair more affordable, the fair organization offered several pricing strategies including advance sales, packaged family admissions, and special discount days.

Latino participation. The fair organization chose to handle the potential of alienating the traditional fair participants by focusing the Latino programming in the Plaza de la Culturas during most of the fair. While the entire fairground showed some improvement in aesthetic appeal and attention to customer experience, the Plaza de la Culturas and the traditional “Salute to Mexico Day” provided the most dramatic changes in increased Latino participation and multicultural appeal.

A local women’s cultural organization, Comite de Damas, had volunteered its time and connections to the development of an exhibit celebrating Latino heritage and cultural arts at the fair. At fairtime, the Plaza de la Culturas was full of artists and artisans, exhibits of artifacts, and vendors of quality crafts and furniture. Hands-on craft activities and ethnic food demonstrations appealed to all ages and cultures. Dance, theater, and musical performances occurred in the building throughout the ten-day run of the fair. Murals were painted on the exterior and interior walls of the building and colorful banners hung from the ceiling. The building was full of sound, activity, and color.

The traditional day of celebration for the Latino culture, the second Sunday of the fair, included a wider variety of popular musical artists and community performance groups throughout the fairground than ever before. The atmosphere of the Plaza de la Culturas built to a near crescendo with more music, more dance, and more people. One consultant noted that visitors to the fair on this day seemed to be primarily multi-generation Latino families.



**Community response.** The *Comite de Damas* coordinator said of the 1997 fair that “many people told me ‘I felt part of the fair! I went two and three times!’ ” She went on to say, “some of the seniors spent their whole day in the building. They’d get there at nine in the morning and not leave.” In the future she thought the fair organization should involve even more clubs and more of the community.

Most other Latino leaders conveyed either a sense of disappointment that the changes had been more superficial than substantive or a sense of anticipation about how much more could be done to keep the door open. The marketing firm’s final conclusions included confidence that relationships the fair organization had forged in the community were still open and worth exploring, and that the fair organization could further develop these relationships to build Latino participation. The firm also recommended that the fair organization create stronger price incentives and advertising strategies to get Mexicali residents to attend the fair.

Traditional fair participants also noted changes in the fair with mixed reviews. For the most part, they tended to recognize that Latino outreach was important and timely. However, some resentment persisted. One member of the community said, “The fair [tried] so hard to market to Hispanics that it is forgetting its roots.”

### In conclusion

“One of the major accomplishments of reinvention was re-educating the board. We didn’t quite know what direction to go in [and] this gave us a view,” said one director during the reinvention project exit assessment. “[Now we’re] embracing the Hispanic community and more aware of everything we do, including management methods.”

At the conclusion of the 1997 fair, CMWFF was positioned to succeed as never before. Though attendance had dropped to a low for the ’90s, CMWFF had stronger reserves than they’d had in years and a much higher community profile. The media and most residents of the county were more aware of and interested in the fair organization’s desire to change and improve. The fair organization was developing beneficial relationships with the business community and cultural organizations on both sides of the border. There was a stronger sense of community relevance of the annual fair and a new level of reciprocal dedication and support from the community.

Though a lot of hard work was still on the horizon in order to maintain the momentum and learn from the first year’s mistakes, at the conclusion of Fairs & Expositions’ reinvention project, a transformation of the California Mid-Winter Fair & Fiesta was well underway.

#### Notes:

<sup>13</sup> The history of census taking calls into question the reliability of population data on “Latinos.” The U.S. Census Bureau has not yet used this name for this category and the shifting population of other labels (for example, “Spanish Surname” or “Hispanic Origin”) has resulted in the aggregation of data that probably have a weak correlation to California’s true demographics. That said, it is still the case that the estimated increases of Latinos in California from 1970 to 1990 are dramatic, *more dramatic* than for any other group. This is true regardless of the precise error rates that may be attributable to confusing categorization.

<sup>14</sup> Sources: U.S. Bureau of the Census, *1970 Census of the Population*, and California State Census Data Center, *1990 Census of Population and Housing*.

<sup>15</sup> In 1970, “Asian” included Chinese, Filipino, and Japanese individuals. In 1990, this category named Pacific Islanders as well.

<sup>16</sup> The 1970 census did not identify Latinos in any designated category except “All Other.”

<sup>17</sup> Most of the material in this discussion is derived in whole or in part from the consultant’s reports and memoranda.



## MULTICULTURAL FAIR: PLANNING GUIDE & CHECKLIST

The annual fair offers a traditional time and place for a community to gather together. It encourages individuals, families, and groups to transcend the connections and boundaries of daily life in a unique and unifying way. Diversifying cultural expression during the fair serves three purposes:

1. Broadening the fair's capacity to mirror existing cultural traditions and heritage within a community.
2. Attracting new customers among local residents who are not currently fairgoers.
3. Providing a greater variety of interesting and educational exhibits and activities for the current base of local fairgoers as well as new customers.

In setting and reaching the goal of creating a multicultural fair, a fair organization fulfills its public purpose, attracts new participants and customers, and strengthens the quality and variety of fair programming. It is important to understand from the outset that enhancing the fair's multicultural appeal means the fair itself will change, not simply that more ethnically diverse people will attend the fair as it currently exists.

It is often true that rules and systems make sense to the experienced user but not necessarily to the uninitiated. Creating a multicultural fair may require a new structure for participation and new categories for exhibits and/or demonstrations or events. Certain procedures may need to be revised – made “user friendly” – in order to gain new participants, particularly if language barriers are present. Encouraging some groups to see the annual fair as an inviting and appropriate venue for celebrating their ethnic identity and heritage may require new levels of flexibility and outreach on the part of fair organizers.

The Planning Guide & Checklist presents general areas and specific steps for creating a multicultural fair. Blank spaces are provided for actual use, and the tool may also be viewed as a template for further customization. (Add additional pages, as necessary.)



**PLANNING AND IMPLEMENTING A MULTICULTURAL FAIR**

**1. Develop a demographic profile of the fair's market area.**

<ul style="list-style-type: none"> <li>• Obtain current data on the ethnic composition of the fair's market area.</li> <li>• The table at the end of this section serves as a sample format for developing a basic demographic profile.</li> <li>• Useful websites:  <a href="http://www.census.gov">http://www.census.gov</a>  <a href="http://www.dof.ca.gov">http://www.dof.ca.gov</a> </li> </ul>	Possible Data Sources	Phone # or Website, Date of Contact
	• City or county planning agencies	
	• Chambers of commerce	
	• Universities	

**2. Appoint a multicultural fair committee of the board of directors and key staff.**

<p>The multicultural fair committee should be responsible for identifying and communicating with new groups, organizations, and artists who want to help your fair become more culturally diverse. It may be desirable to expand the membership of this committee to include people from the community who have special expertise and experience in working with cultural organizations and/or organizing multicultural events. Whether a board member, staff member, or volunteer, the person who leads this effort on behalf of the fair organization will need outreach and constituency-building skills.</p>	Name and Contact Information
	<p><b>Chairperson:</b></p> <p><b>Board members:</b></p> <p><b>Non-board experts (if any):</b></p> <p><b>Staff member (if any):</b></p>

**3. Budget support for multicultural participation.**

<p>Be prepared to offer small grants to participant organizations and artists in exchange for producing quality exhibits, performances, and other activities at the fair. (Add pages, as needed.)</p> <p>List the name and contact information for each organization.</p> <p>1.</p> <p>2.</p> <p>3.</p>	Amount
	\$
<b>Total Amount Distributed</b>	\$
<b>Total Amount Budgeted</b>	\$



**PLANNING AND IMPLEMENTING A MULTICULTURAL FAIR**

**4. Prepare a packet of information for distribution to organizations that represent each targeted ethnic community.**

Contents of the information packet should include:	<ul style="list-style-type: none"> <li>• History, mission, and purpose of the fair (one page).</li> <li>• Overview of desired cultural arts or educational demonstrations, performances, or exhibits, including quality standards and technical information (stage and booth dimensions, sound and lighting equipment, hours, requirements, permit fees, etc.).</li> <li>• Fair dates, deadlines, participation forms, maps to/of fairground, parking information, contact names and phone numbers.</li> </ul>
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**5. Conduct outreach in the community.**

Schedule meetings with leaders from the community's ethnic and cultural organizations to describe the fair's goals, welcome participation, and ask for assistance in securing an exhibit, artisans, or demonstrations. Provide copies of the information packet. Invite the leader (or representative) to meet with the multicultural fair committee to discuss specific plans and goals.	<b>Organization and Name of Contact</b>	<b>Phone/E-mail</b>	<b>Appointment Date and Time</b>

**6. Include professional marketing support.**

Ensure critical marketing support by having a marketing professional (volunteer or contractor) plan and implement a promotional campaign that includes feature articles, news releases and media coverage for the multicultural fair and featured participants. Secure special interest stories and photos for the fair program or newspaper fairtime insert.	<b>Name and contact information for marketing support:</b>
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**7. Share advertising and co-promote.**

Include information about participating multicultural organizations' and artists' events in media packets and press releases for the fair. Provide press releases and media packets to participant organizations for use in newsletters and other communications.	<b>Done:</b>	
Create special ticket-sales promotions available only through participant organizations.	<b>Done:</b>	
Buy time and advertising space in local media and cable for all major ethnic markets. Have local experts translate materials for each market. NOTE: Provide special interest stories and coverage opportunities to community, religious, arts, education and business organization newsletters, websites, or cable television programs.	<b>Name of Media Outlet</b>	<b>Ad Costs</b>
		\$
		\$
	<b>TOTAL</b>	\$



**PLANNING AND IMPLEMENTING A MULTICULTURAL FAIR**

**8. Provide fair signage and information that welcomes and informs all fairgoers.**

- Use recognized international symbols on all fair maps and in the program to identify fair services and emergency sites.
- Work with local media to provide fair programs and schedules in each of the community's dominant languages.

**Languages to accommodate:**

Ask participating multicultural organizations or public safety organizations to provide multi-lingual translators of each of the community's dominant languages to serve shifts throughout the fair as on-site translators. Distribute translators' names and shift schedules to all fair departments and information booths.

**Organizations and contact info:**

**9. Practice inclusiveness at fairtime.**

At all levels of the fair organization (board, staff, and volunteers) discuss, promote, and demonstrate respect for the multicultural fair concept and goals. Recognize and reward innovative recommendations or practices to make all fairgoers and participants feel welcome and safe at the fair (including physical accessibility).

**Done:**

For special performances or exhibits featuring elders or protected cultural traditions (Native American costumes or artifacts, for example), appoint special event and stage staff as liaisons from arrival to departure.

**Done:**

Promote the fair directly to families and encourage family participation through family-pack discounted sales.

**Done:**

Ensure that all public safety officers, security and first aid contractors, gate and admissions staff are apprised of all special program days and times where language and/or cultural differences may be a factor or require special customer assistance.

**Organizations and contact info:**

**10. Evaluate the success of enhancing the multicultural presence at the fair and recognize participants.**

After the fair, follow up with participating groups to determine the success of the multicultural fair planning and actual event. Ask how to make next year's fair even better and more representative of all segments of the local community.

**Recommendations:**

Invite participant organizations to a hosted reception to receive official thanks for their participation and efforts. Provide letters or certificates as gestures of appreciation.

**Done:**

### Basic Demographic Profile

#### A. PRIMARY MARKET AREA

(geographically defined as entire county, multiple towns within a county, multiple counties, or some other configuration)

	0-17		18-34		35-54		55+		Total	
	#	%	#	%	#	%	#	%	#	%
African American										
American Indian										
Asian										
Hispanic/Latino										
Pacific Islander										
White										
Other:										
Other:										
<b>Totals</b>										

#### B. TOTAL MARKET AREA

(geographically defined as primary market area, plus surrounding areas from which this fair attracts fairgoers)

African American										
American Indian										
Asian										
Hispanic/Latino										
Pacific Islander										
White										
Other:										
Other:										
<b>Totals</b>										





# CONSIDERING RELOCATION

This case study describes the experience of the El Dorado County Fair (EDCF) with relocation decision-making. It includes pertinent background information on the relocation issue in that community as well as an account of what transpired once EDCF became a reinvention pilot site.

At the end of the case study is a checklist that identifies some of the major considerations related to the relocation of a fairground. The checklist will help fair organizations decide whether to pursue relocation. It also highlights the need for specific outside expertise.

Fairground relocation obviously is a complex matter and cannot be taken lightly. Occasionally it is necessary to make a decision quickly, however, in order to take advantage of special resources or unique options that may be available for only a short time. Whether or not the decision is time-constrained, any fair organization that is contemplating relocation, even under ideal circumstances, will benefit from weighing the advantages and disadvantages systematically.

## EL DORADO COUNTY FAIR: A CASE STUDY

In 1994, the Division of Fairs & Expositions selected the EDCF in Placerville, California as a pilot site in the state-supported reinvention project. The fair organization's impetus to pursue pilot status was as a means of resolving a 15-year debate regarding whether to relocate the fairground to a site away from town. Originally, the existing site had been located away from town but, over time, the development that accompanies population growth had brought the city boundaries to the fairground's doorstep.

EDCF came into the reinvention project with several completed relocation studies that described alternative sites and feasibility reports that contained alternative financing options. The reinvention selection committee believed that providing consulting expertise might resolve the issue relatively quickly, given the amount of background information that EDCF already had available. The committee's rationale for selecting EDCF was that involving the state via the reinvention project would generate valuable insights and information of use to other fairs that are, or will be, facing a relocation question.

### Outcome

EDCF tabled the relocation option as a result of reinvention's involvement. However, the overall relocation analysis and decision-making process, as documented by the reinvention project, has led to a greater understanding of how best to "set the stage" for successful relocation. For starters, a successful relocation would stem from a combination of at least the following factors:

- A mission-driven commitment to capitalize on a unique opportunity (not to leave a problem).
- Financial feasibility: adequate resources and cost-sharing arrangements.
- Community and political support for the annual fair and for interim activities that take place year-round on the fairground.
- Revenue-generating activities that can transfer to, or occur as a result of, the new location.
- Proximity to current fairgoers (desirable).

This relocation case study recounts the interplay of these factors in determining the opportunities and challenges faced by EDCF.

### Situation analysis

Annual fair attendance steadily declined from 1993 to 1996, then rose again in 1997. The population of El Dorado County, however, was steadily growing during that period. In a longer-term perspective, the county population since 1980 has grown by more than 60 percent. State and local government demographers project similarly rapid growth into the new century.

Year	Attendance	% Change	Market Share*
1993	75,400	—	54%
1994	74,100	- 1.7%	52%
1995	72,700	- 1.9%	50%
1996	63,700	- 12.4%	44%
1997	66,400	+ 4.2%	45%

Source: Lewis Ridgeway, CPA, Financial Management Evaluation, El Dorado County Fair, 1998.

\*Market share in this table is represented by attendance as a percentage of total county population.

Because fair attendance was not keeping pace with population growth, relocation appealed to the EDCF board as a possible means of attracting new fairgoers. Furthermore, local government began to consider whether alternative uses of the present site would be more beneficial for the community and generate new tax revenue for city and county agencies.

### Loss of urgency

Local government's post-Proposition 13 search for new tax revenue included an interest in redeveloping the fairground as a shopping center or other commercial enterprise. Furthermore, a neighboring business owned large parcels of land that were suitable and appealed to EDCF for use as a new fairground. Thus, public and private interests coincided to produce a strong impetus for relocation. Responding to these circumstances, the county commissioned feasibility reports in 1990, 1992, and 1993 as well as conducted a fairground relocation study.

For its part, EDCF perceived the limited acreage as an impediment to its own revenue growth (for example, insufficient on-site parking capacity to accommodate current attendance, much less an even greater demand). In addition, EDCF expected that "expanding the site" by increasing the level of interim activity on the fairground would put the fair organization in conflict with businesses and residents in the surrounding neighborhoods.

By the time reinvention came on the scene, the fair organization and community had engaged in a deliberation that had lost its urgency after 15 years of indecision. Each time the issue was seemingly put to rest, another round of local elections would reopen the conversation. EDCF reviewed and visited potential properties, and the fair organization explored partnerships and alliances with other agencies, but an irresistible alternative to the current site did not emerge. One negative effect of this prolonged indecision was that the fair organization put off making long-range commitments to improving the current site, thinking it should conserve its development resources for relocation.

No one, it seemed, wanted to make a final decision. In particular, no one wanted to make a multimillion dollar financial commitment.

**The facility**

EDCF's park-like setting is a highly prized community resource. Its location, ambiance, and level of activity are assets in the El Dorado foothill community. The once-rural location has now been surrounded, however, by a sprawling county government center and hillside condominiums on the upper end, major chain grocery stores and retail strip malls on either side, and a variety of service businesses on the thoroughfare that fronts the main entrance to the fairground. In a word, the fairground is land-locked.

Table 2 <b>El Dorado County Fairground</b>	
Popular rentals	Single-purpose facilities
<ul style="list-style-type: none"> <li>• 16,000-square foot exhibit hall</li> <li>• 2 small exhibit buildings with additional area of 7,300 square feet (combined)</li> <li>• Open-air livestock barn</li> <li>• Open lawn areas</li> <li>• Portable buildings recently vacated by the community college district</li> <li>• Show rings</li> </ul>	<ul style="list-style-type: none"> <li>• 99-seat theater</li> <li>• Ball fields</li> <li>• Boardroom</li> <li>• Caretaker's cottage</li> <li>• Fair organization office</li> <li>• Grandstand and 5/8-mile dirt track for motorized racing</li> <li>• K-3 school and childcare center</li> <li>• Maintenance shop</li> <li>• Multi-level dirt parking lot</li> <li>• Museum</li> <li>• Pipe organ building</li> </ul>

**Operating environment**

The reinvention project's initial assessment of EDCF included an analysis of the organization's capacity to manage a relocation effort, taking into account its governance and organizational structure, fiscal condition, and year-round business activities.

**Oversight and governance**

EDCF is a private nonprofit association that contracts with the county to operate the annual fair and year-round facilities. The association elects six of its members to the 11-member board of directors, and the county board of supervisors appoints five directors. The county administration regards the fair organization's CEO as a quasi-department head in county government, although she reports to the EDCF board of directors. All fair staff are association employees but, under the terms of the contract with El Dorado County, EDCF employees receive county benefits.



### **Association membership**

The association has a small but stable membership of approximately 60 loyal fair supporters. They include board members, staff, and former 4-H parents who remain committed to the fair. The little-known association does not actively recruit new members, but patrons who register complaints or recommendations are encouraged to pay the nominal membership fee of \$20 and “make a difference” by joining the association. During the initial reinvention assessment at EDCF, interviews with community members and government officials revealed a lack of familiarity with the association. Most were not aware, for example, that membership is open to any interested citizen.

### **Fiscal condition**

Operating funds are derived from the annual fair, interim fairground use, and an annual state allocation. The operating resources of the fair organization, in combination with state funding and local donations of labor and materials, provide for capital outlay. The fair organization tends to look mainly to the state for new resource development. As of 1995, the fair organization had few partnerships with local business and very little sponsorship support beyond the donation of specific services.

## **EL DORADO COUNTY FAIR**

### **Revenue, Expenses, and Net Revenue**

1993 to 1997

Year	Revenue	Expenses	Net
1993	\$384,100	\$213,100	\$171,000
1994	\$409,300	\$225,600	\$183,700
1995	\$406,900	\$225,300	\$181,600
1996	\$435,300	\$248,700	\$186,600
1997	\$473,200	\$257,900	\$215,300

Source: Lewis Ridgeway, CPA, Financial Management Evaluation, El Dorado County Fair, 1998.

An analysis of EDCF's financial status indicated that the organization has a good record of debt reduction and is technically solvent, but it is not sufficiently capitalized to withstand a major financial setback. EDCF's fairtime revenues are remarkably consistent, given a downward trend in attendance (see Table 1, page 80). Furthermore, the annual fair's contribution to total budget increased every year except one, from 1993 through 1997, despite drops in attendance.

Relocation financing mechanisms identified by consultants in financial feasibility reports prepared prior to reinvention are, for the most part, no longer available. Either other projects have exhausted local bonding capacity or changes in state law have eliminated or further restricted those mechanisms as options.

EDCF's available resources equaled a small fraction of even one monthly payment on a relocation debt. Financial partnering with state and local agencies would not be adequate to support either redevelopment of the current site or relocation. And, the fiscally conservative board of directors made sure that EDCF's cash reserves were adequate to meet basic obligations. In other words, year-round activities and events generated sufficient cash flow for ongoing operations. However, on its own, EDCF would not have sufficient resources to finance, much less fund, a fairground relocation.



### ***Local government participation***

The City of Placerville bears the cost of all external road and other infrastructure maintenance and development and is the primary recipient of neighborhood complaints about the impact of increased traffic during the annual fair and major events. Since 1993, the county has provided in-kind support to the fair in the form of security, shuttle transit, and satellite parking facilities. In 1998, ridership reached an all-time high of more than 20,000 fairgoers.

In short, EDCF's relationships with city and county jurisdictions are friendly but do not generate major financial support.

### ***EDCF's integration into the community***

EDCF's outreach to local service clubs is a traditional pre-fair activity. Although most, if not all, service and fraternal organizations in the community use the fairground for a number of events, including food or beer concessions at fairtime, several revealed a degree of dissatisfaction with facility quality. One club offered to install a new sound system as an in-kind contribution, but EDCF turned it down. That action was not well received; a greater sense of shared ownership of the fairground would have been welcomed.

Jurisdiction over a state-built facility that is situated within city limits on county-owned property and run by a private nonprofit association will inevitably be complex. Perhaps it is this complexity that prevented the fair organization from being more widely recognized as a source of event management expertise. For example, a regional planning consortium for California's Sesquicentennial celebration did not include, nor invite, representation from the fair organization.

### ***Local culture, economy, and politics***

The prolonged indecision regarding relocation triggered the reinvention project's interest in having more information about the fair organization's relationship to local government and the community and, ultimately, in understanding the fair organization's participation in local politics.

### ***Physical features***

El Dorado County is split lengthwise by a major highway that rises more than 5,000 feet from the valley metropolis of Sacramento to world-renowned Lake Tahoe – over 110 winding scenic miles. White water rafting, hiking, camping, and winter skiing are favored sports. Apple Hill draws huge crowds to traditional events in the apple and pear orchards every fall and to Christmas tree shopping in winter. As the site of the original discovery of gold, the state park at Coloma (nearby to Placerville) is a favorite family outing. The foothill and mountain terrain is dotted with a number of small towns, along with ranches, farms, and wineries.

### ***Population***

Ten percent of the county's 135,000 residents live in Placerville, the largest town in, and county seat of, El Dorado County. Placerville, 50 miles east of Sacramento, has historical ties to the gold rush and is home to the fairground. Since 1980, the county has experienced a more than 60 percent increase in population, consisting largely of recent retirees and urban refugees. The county's rural charm, scenic setting, and proximity to Lake Tahoe and metropolitan Sacramento are magnets for new residents, many of whom arrive expecting the best of all worlds: a rural lifestyle supported by a high quality infrastructure, low property taxes, and a strong economy.

### ***Economy***

Until the 1980s, lumber, cattle, dairy farms, and orchards were the major sectors of El Dorado County's economy. Now, the local economy depends heavily on service and retail sectors, which in turn depend on pass-through tourism. Placerville would like to become a destination attraction with the help of special events and other unique features. The fairground is not considered a major draw or destination although most local events, even those of regional interest, are held there.

The extended drought delivered a one-two punch to the local economy in the late 1980s and early 1990s. Low snow levels decimated summer and winter recreational sports and resulted in loss of tourism dollars. Severe water restrictions limited new development and, with it, growth in property tax revenue. The sluggish economy also took a toll on county and city revenues.

### ***Politics***

In interviews, community and government leaders said that local politics exemplifies the western tradition of rugged individualism. They mentioned divisive water and development wars as evidence. The contemporary version of these conflicts is that long-time landowners tend to support economic growth and development, welcoming high property values, but newer residents tend to oppose development – even as they demand increased levels of service.

The lack of completion in El Dorado County's master planning process is another example of disunity among county residents. El Dorado County planning staff had prepared many drafts but, at the time of the reinvention project, the county board of supervisors had so far failed to approve a final master plan. "The public forum," noted one city planner, "has literally broken down and all we're left with are the vehement pro and con groups. We need a new model of civic participation here."

## **INTERPLAY OF FACTORS**

The reinvention phase of relocation analysis consisted of retaining consulting expertise in the areas of economic development, real estate analysis, and land use planning. Consultants examined EDCF's existing reports and also conducted their own assessment of the presenting issues for relocation, which EDCF had identified as pressure for commercial redevelopment of the site and parking space limitations.

### **Commercial redevelopment**

The fairground is an easily accessible piece of property with potential value as a site for commercial redevelopment that would generate new sales tax revenue for the cash-strapped city and county governments. The attractive 54-acre county-owned fairground sits within city limits, only a quarter-mile from the major east-west highway (Highway 50). Currently, most of the development that generates sales taxes has occurred outside city limits. Because Placerville's property taxes go directly to the fire protection district, city government pays all its other expenses solely from sales tax and transient occupancy tax revenue and user, permit, and license fees. Thus, redevelopment of the fairground as a commercial site that would generate sales tax revenue was an option the city could not afford to overlook.

As the southern gateway to the Sierras, the city of Placerville wants to attract overnight tourism, but it has a limited number of hotel rooms. An upscale hotel and conference complex near a proposed gated community of 375 homes is on the city's agenda. Planners view an additional hotel adjacent to or on the fairground as desirable. Other site redevelopment concepts that would meet local needs have included high-end retail (shopping mall), concert venue, office space, and a major conference and events center.

### **Parking**

The current site has minimal ground for public parking, which EDCF perceived to be its major drawback. Reinvention's land use planners investigated this concern but ultimately viewed empty vehicle storage as the lowest priority for use of public property. In addition, because the need for parking space peaks for a relatively small number of days, the consultants did not view expansion of parking capacity as a compelling reason to relocate.

The consultants advised that adding off-site parking is both more responsible and more affordable than expanding on-site parking lots. Furthermore, off-site parking can significantly mitigate traffic impacts on surface streets and even serve as the focus for new levels of local partnership and support.

### **Favored relocation site**

The favored relocation site was within three miles of the current fairground and near an area in large ranch holdings planned for development. The new community college campus is adjacent to this site. The infrastructure improvements necessary for the fairground would include an expansion of all public utilities (water, sewer, power, telephone) and major roadway widening, paving, extensions, and traffic signals. A new freeway overpass and on- and off-ramps would also be needed to handle the increased volume of traffic. In addition to replacing and transporting existing buildings, EDCF's vision encompassed new facilities, including an equestrian center, riding trails, ball fields, a community theatre, office space for local organizations, and expanded parking facilities. A greenbelt perimeter would surround the entire fairground.

### **Cost projections and financing capacity**

The consultant for the 1992 feasibility study estimated that development costs, both on- and off-site and including building transport and replacement, would reach \$27 million. In 1993, this cost estimate went up to \$37.5 million (\$20.3 million for site development and \$17.2 million for off-site improvements). By 1996, inflation and administrative costs had increased the previous estimates to \$64 million.

The proposed financing package included the creation of a joint powers authority to access special district funding and bond issuance, long-term lease revenues from the former fairground, and ongoing revenue-generating business activity.

Given the level of proposed activity at the new site, county and city officials bundled the bulk of off-site infrastructure improvement costs (roads and utilities) into the relocation budget. Subsequently, opinion polling revealed that taxpayers were unwilling to increase property taxes in support of a bond issue to fund a new fairground, even if they thought relocation was a good idea.

Citizens felt that use of a fairground is a right of residence, not a privilege. Aside from that, various health and safety needs received local preference, including fire and police protection, road maintenance, libraries, and school construction and repair. The tax-averse citizenry of El Dorado County did not view a new fairground as a fundamental need.

### Decision: redevelopment not relocation

Reinvention project consultants recommended that the “relocation discussion and debate be tabled, and that the fair board focus its energies exploring potentially viable opportunities to make better use of the existing fair site.”<sup>18</sup> Key factors supporting their recommendation included:

- The city’s decision not to utilize redevelopment authority and funding to increase the value of the current fairground to the degree that it would capitalize relocation costs at the new site through a sale or continuing revenues from new uses.
- A statewide decline – after completion of the 1992 relocation feasibility report – in the popularity of Mello-Roos district bonds for financing public infrastructure.
- A presumed inability to transfer motorized racing to the new site. Motorized racing is a significant revenue generator at the current fairground, and consultants viewed the difficulty of quickly establishing a replacement activity that would guarantee annual net revenues of \$500,000 toward bond repayment as a serious constraint.<sup>19</sup>
- The return of a former tenant’s 17 useable acres presented new opportunities for reconfiguring the fairground.
- Adjacent real estate parcels potentially available for lease or purchase.

The county taskforce accepted the recommendation to close the issue of relocation. The decision was not a surprise, but it allowed the political dialogue to take a back seat to economic reality. Minus public financing, the fair organization did not have the capacity to finance a \$60 million relocation.

### EDCF’S REDEVELOPMENT PLAN

The EDCF board of directors requested assistance from the reinvention project in examining the current site as a “blank slate” – in other words, as if it were an empty piece of land. After reviewing several drafts by land use planners, and after a retreat at which they agreed on a redevelopment plan, the fair board selected the following reconfiguration:

- Administration office
- Additional parking space
- Ball fields
- Central lawn area
- Enlargement and relocation of the racetrack<sup>20</sup>
- Enlarged maintenance yard
- Indoor/outdoor theater
- Large, multipurpose hall with movable internal walls
- Perimeter road
- Permanent concessions

EDCF has developed but not yet tested a lengthy list of potential public and private partners and/or funders to participate in long-range redevelopment of the site and facilities. In July 1998, the fair organization held a community meeting at which EDCF unveiled its redevelopment concept. Those in attendance embraced this plan.

**Notes:**

<sup>18</sup> Letter to the Relocation Task Force; Gruen Gruen + Associates, 17 November, 1995.

<sup>19</sup> Current year-end net revenues average \$100,000.

<sup>20</sup> EDCF is conducting noise level audits as part of an effort to measure the impact of the racetrack relocation.



# RELOCATION CHECKLIST

This checklist will guide fair organizations through preparation of a situation overview that will facilitate making a decision whether to undertake fairground relocation. Orderliness and prioritization have been attempted wherever possible; however, with one exception, it is not necessary to take the steps listed under each major heading in sequence. The exception is to determine whether the factor motivating relocation is a problem or an opportunity. Every relocation assessment should begin with answering this question first.

## Caveat

Successful relocation is a complex undertaking. This checklist identifies many but not all of the major considerations. Any fair organization facing this decision should first seek specialized advice and consultation.

## INSTRUCTIONS

Complete as many of these steps, or guidelines, as apply. Following each set of steps under a major heading is a set of questions, along with blank space for recording brief responses. Add pages, as necessary, to write your responses to the questions. Completing this checklist and answering the questions will help you assess whether relocation or redevelopment will best meet your fair organization's needs and dreams. At a minimum, the checklist will identify critical gaps in currently available information.

## BASIS AND URGENCY

- \_\_\_\_\_ 1. Define the motivating factor(s) for relocation.
- \_\_\_\_\_ 2. Assess the governing body's sense of urgency.
- \_\_\_\_\_ 3. Seek outside expertise to identify and evaluate alternatives to relocation. To ensure objectivity, the expert should be someone who has no affiliation with the fair organization, preferably someone from outside the local community.
- \_\_\_\_\_ 4. Assess the leadership for relocation, internally and externally. A unified organizational and political commitment to relocation is essential.
- \_\_\_\_\_ 5. If external decision-making is a factor, insist on timely resolution of all matters that will affect the fair organization's relocation decision-making process.



<p><b>PROBLEM OR OPPORTUNITY</b></p> <p>The primary motivation for relocating the fairground at this time is to:</p> <p>_____ Leave behind an unresolved problem or set of problems.</p> <p>_____ Take advantage of a unique opportunity.</p>	<p><b>NOTE:</b></p> <p>If the primary motivation is to leave behind an unresolved problem, stop here! First, explore all possible options for solving the problem(s) at the current site. The costs of relocating will almost inevitably be higher than redeveloping and/or reconfiguring the current site.</p> <p>If the primary motivation is to take advantage of a unique opportunity, proceed with this checklist.</p>
<p><b>MISSION AND PURPOSE</b></p> <p>In which specific ways does the current fairground not support the fair organization's mission and purpose?</p> <p>In which specific ways will a new fairground support these fundamental objectives?</p>	
<p><b>VISION</b></p> <p>If the fair organization has written a statement of its vision for the future, in which specific ways will a relocation of the fairground help the organization reach that vision?</p> <p>If a written vision statement is not available, are there specific ways in which the fair organization anticipates that relocation will improve the organization's prospects for the future?</p>	
<p><b>POLITICAL POSITIONING</b></p> <p>To what degree are local government officials accessible to the fair organization's CEO and board of directors? To what degree are they committed to the fair and to the fair organization's vision for the future?</p> <p>What role does the fair organization play in managing local public issues?</p> <p>Describe current political opinion regarding (1) relocation of the fairground, and (2) redevelopment of the existing site.</p> <p>If the new site is located in a different political jurisdiction, how do local officials in the new jurisdiction view the prospect of bringing a fairground into their area?</p>	



## COMMUNITY ENGAGEMENT AND RELEVANCE

In which specific ways, and to what degree, are board members involved in various sectors of the local community?

In which specific ways, and to what degree, is the fair organization's CEO active in the business and social life of the community?

What are the fair organization's methods of routinely engaging the community in making decisions about the future of the fair? What input has the fair solicited and received from the community regarding fairground relocation possibilities?

What opportunities does the fair organization foresee for new alliances and partnerships with local government and/or civic or fraternal organizations to increase social benefits for the community? Which of these opportunities, if any, are specific to the intended site? To the current site?

To what extent does the community, including the private nonprofit sector, depend on the fairground as a private and public event center? How will current use patterns be affected by each relocation alternative?

## FINANCIAL FEASIBILITY

- \_\_\_\_\_ 6. Conduct a thorough analysis of current assets relative to relocation expenses (including moving costs, site development, equipment, and personnel).
- \_\_\_\_\_ 7. Estimate the potential impact-mitigation costs in connection with new site development and, if relevant, current site repair and/or reconfiguration. Determine the options for sharing costs with local government and/or private entities.<sup>21</sup>
- \_\_\_\_\_ 8. Estimate the potential short- and long-term revenue gain or loss that would result from relocation (in other words, best and worst case scenario).
- \_\_\_\_\_ 9. Seek outside expertise to:
  - Evaluate the fair organization's assumptions regarding financial feasibility.
  - Identify and evaluate potential financing mechanisms, including length of time for which any one plan may be feasible.
  - Estimate, for each option, the fair organization's monthly cost for debt service and number of years full repayment will require.



<p><b>FINANCIAL PROFILE</b></p> <p>Does the fair organization have adequate resources to fund at least a portion of relocation costs? To fund at least a portion of the debt resulting from a cost-share financing plan?</p> <p>What is the fair organization's reinvestment pattern at the current facility? In other words, is facility quality <i>currently</i> a high priority?</p> <p>What are the fair organization's revenue centers <i>now</i>?</p> <p>What are the fair organization's <i>new</i> revenue generating opportunities...at the intended site? At the current site?</p>	
<p><b>ECONOMIC TRENDS</b></p> <p>Is the local population increasing or decreasing?</p> <p>What types of businesses are located – and locating – in the fair organization's market area?</p> <p>What opportunities does the fair organization foresee for new alliances or partnerships with these businesses? Which of these opportunities, if any, are specific to the intended site? To the current site?</p> <p>What is the long-term forecast for the local economy?</p>	
<p><b>RELEVANCE INDICATORS</b></p> <p>Is the fair attracting more or fewer customers each year? More or fewer participants (exhibitors and commercial entities)? What are the five-year trends?</p> <p>How much (in miles and travel time) will relocation affect proximity of the fairground for various demographic segments of <i>current</i> fairgoers?</p> <p>Is the fairground attracting more year-round activity, or less? What is the five-year trend?</p> <p>What is the fair organization doing <i>now</i> to develop new uses of existing fairground facilities?</p>	





## LAND USE PLANNING

10. Seek outside expertise to evaluate limitations and possibilities of both the proposed and existing sites. This should include a “blank slate” analysis to envision the most appropriate configuration for use as a fairground. It should also include a market value assessment of the highest and best use of each site (including the current site).

<p><b>PROs AND CONs</b></p> <p>How would relocating the fairground serve the community?</p> <p>What would the community lose through relocation of this public resource?</p> <p>Has the fair organization exhausted all efforts to address the perceived barriers to success at the current location?</p>	
<p><b>STRENGTHS, WEAKNESSES, OPPORTUNITIES, AND THREATS (SWOT)</b></p> <p>What are the strengths and weaknesses of the existing fairground?</p> <p>What new opportunities would the fair organization have if the fairground is relocated? If the current site is reconfigured?</p> <p>Are there opportunities to obtain new sites through donations or trades? If so, are the time constraints for making a decision manageable?</p> <p>Which terms of the offer are problematic (if any)?</p> <p>What threatens the success of continuing the use of the current fairground site?</p>	





## REAL ESTATE AND REGULATORY ANALYSIS

- \_\_\_\_\_ 11. Research deed restrictions on the current property to determine whether limitations on land use and transfer of ownership, or reinstatement of original ownership, are embedded in historical documents. Find out whether multiple ownership or shared capitalization of existing buildings over past decades may impede sale of the property or embroil the governing body in ownership disputes.
  
- \_\_\_\_\_ 12. Conduct a thorough audit of all underground utilities and structures to ensure that no costly surprises are lurking. For example, hazardous waste from underground storage tanks may render a property temporarily unusable and the cost of environmental clean-up can be substantial.

<p><b>OWNERSHIP</b></p> <p>Which entity owns the current fairground?</p> <p>Which entity owns all the improvements on the fairground?</p> <p>Who has the authority to determine the conditions of sale?</p> <p>Will it be possible for the proceeds from a sale or long-term lease, or at least a portion of the proceeds, to contribute to the purchase or development of the new fairground?</p>	
<p><b>JURISDICTION</b></p> <p>Which local jurisdiction writes the rules for the current site? If the jurisdiction for the intended site is different, how do the decision-making and approval processes vary?</p> <p>Will historic noise and/or land use restrictions or exemptions transfer to the new site? If not, how will current revenue-producing activities be affected?</p>	

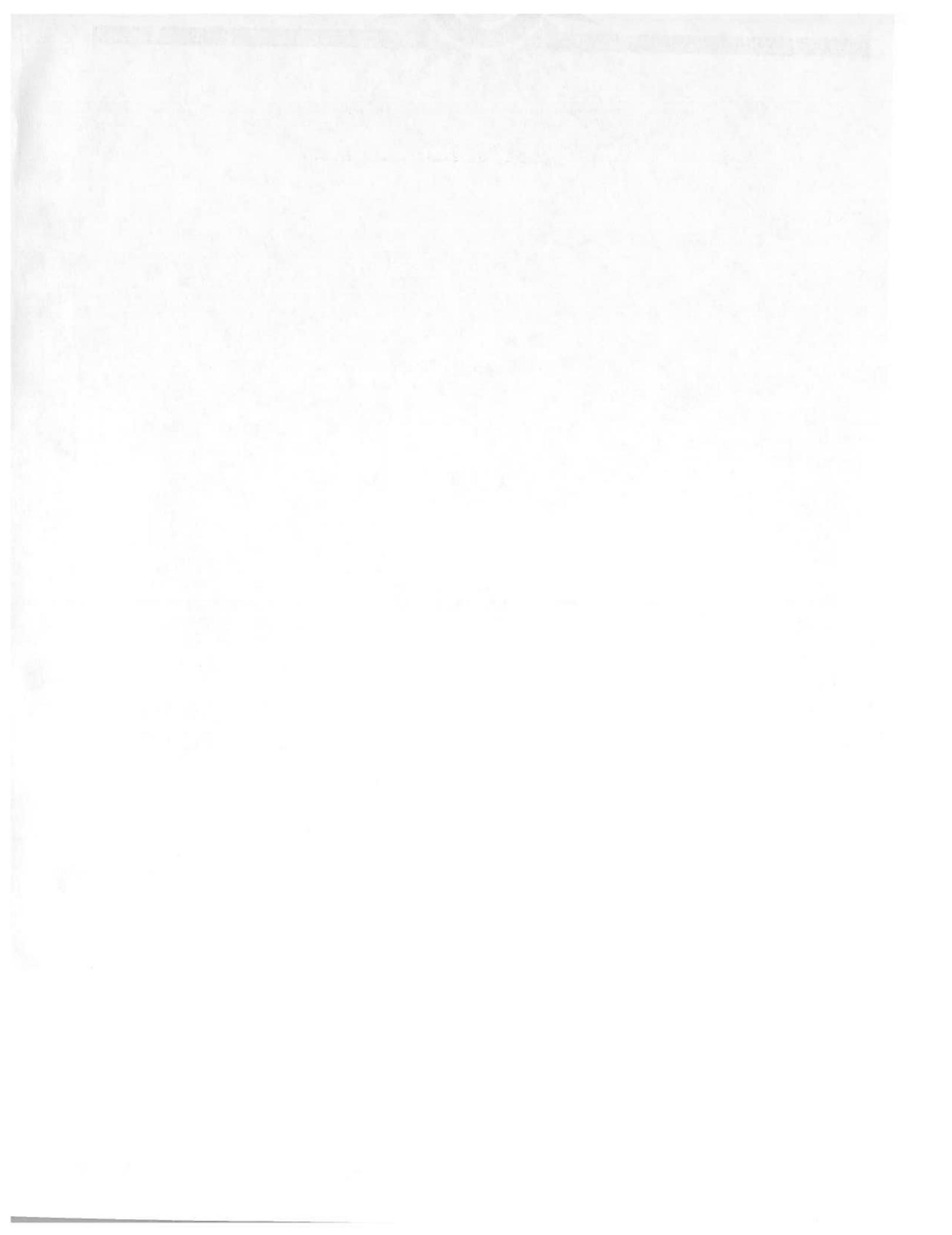
Note:  
<sup>21</sup> Ultimately, the estimated cost of traffic mitigation and highway improvements for relocation of the El Dorado County Fair was \$30 million – 50 percent more than the cost of site development. The county believed the fair organization alone should be required to bear these costs.



## PART FOUR:

### TOOLS





# CEO REPORT TO THE BOARD ON THE ANNUAL FAIR

## OVERVIEW

Having the organizational capacity to recognize “quality” is a prerequisite to producing a great fair. Every profession and enterprise in today’s economy has had to learn how to make continuous improvements in quality by gathering and using information to measure its performance. Part of what it means to operate in the information age is that having information to facilitate evaluation of quality and performance is a necessity, not a luxury.

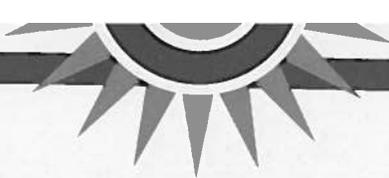
All of the tools in this book are designed to guide assembly of the information that tells the story of a fair organization’s operational effectiveness. This particular tool refers specifically and exclusively to the quality and success of the annual fair. Within five years of initial use of this tool, fair organizations will have data that can be reconfigured as trends in fairgoer satisfaction or dissatisfaction. Trend analysis will support a fair organization’s ability to make adjustments in annual fair programming that will keep as many quality and performance indicators as possible moving in the direction of “better.”

The fair organization that uses this tool may want to collect and store each year’s report on the annual fair in a binder. The first completed report will establish a baseline against which an organization can measure each succeeding year’s experience. In this way, these annual reports will increase in value and usefulness over time. By recording the legacy, created by a specific CEO or group of staff members, this documentation will also be of inestimable value to their successors. And, significantly, it will become the primary source of planning data for use by board and community organization committees as they plan for the next fair.

## GENERAL INSTRUCTIONS FOR COMPLETING THIS REPORT

The tables and other displays in this report are guidelines. To facilitate customization of this report to fit a fair organization’s unique circumstances, use a photocopy of the blank form found in this book for the first year and then create computer-generated forms for subsequent years. Use of the report format suggested here is, of course, optional. As they read the basic instructions on the following pages, individual fair organizations may find areas where additional – or fewer – rows, columns, and displays will make the tool more useful for their own operations. Such changes are recommended and encouraged.

- Throughout the report, on the tables that contain boxes indicating “**This year,**” and “**Last year,**” manually enter the current year and last year. For all “**Five-year average**” categories in which the fair organization has data for the previous five years, calculate the five-year averages and enter those numbers in the column with that heading.
- *Do not include this year’s data in the calculation of five-year averages.*
- Enter “I/D” for “inadequate data” in any cell for which the organization did not collect data in prior years.
- Enter “N/A” for “not applicable” in any cell for which the data called for does not apply – or delete that row, column or table altogether.



### Supplemental record

Future trends analysis will be more accurate and much easier to complete if the person inputting the data knows exactly what each category represents. Therefore, to supplement the report on the annual fair, it is important to maintain a supplemental record that will serve as the fair organization's "memory" from one year to the next. When the person inputting data has to make his or her own interpretation regarding how to record information that doesn't fit perfectly into the format provided, or that may be unique to a specific fair, that person should make a note of his or her interpretation in the supplemental record. A useful guideline might be: Assume you *won't* remember!

EXAMPLE: Include in the supplemental record a separate listing of all types of revenue by source and all types of cost by expense category (see Section II). Then continue to use the same categories in subsequent years to refer to the same types of revenue and same types of cost. By adhering to this discipline, a fair organization will know for sure that it is comparing apples to apples and oranges to oranges.

### COVER SHEET

- In the blank spaces on the report cover, enter the name of the fair (*not* the name of the fair organization) and the exact calendar dates of the fair.
- Example: California Mid-Winter Fair & Fiesta (*not* Imperial Valley Expo).

## I. EXHIBITORS, ATTENDEES, AND VOLUNTEERS

This section describes various levels of participation in the annual fair by exhibitors, attendees, and volunteers. A conscientious accounting will identify degrees of variety in offerings available to fairgoers and a broad indication of fairgoers' interest level in the fair.

### Exhibitors

- Fill in the names of exhibit categories under noncompetitive and competitive. This table should display an *unduplicated count* of the number of exhibitors in *each category*. If one individual enters livestock, for example, and also submits multiple photographs as entries in an arts category, competitive or noncompetitive, that exhibitor should be counted once in the livestock competition category and once in the arts category.
- Use the blank spaces to enter categories that are unique to the fair. However, to meet the purposes of this section, make all categories *broad* and keep the *number* of categories small. Keep notes in the supplemental record to list from year to year every type of exhibit that was included in each broad category.
- Calculate a subtotal for noncompetitive categories (commercial, education, government, etc.) and a separate subtotal for all competitive categories.
- Add the two subtotals to indicate the total number of exhibitors in each year.

### Attendees

- This table displays only the *number* of attendees (*not* revenue from ticket sales).
- Under each year, first enter the highest number of attendees on any single day of the fair. Which day had peak attendance? Fill in that exact date. (Was it the first day of the fair? The last? A weekend day? Be sure to make a note of this in the supplemental record – it may also be helpful to include comments on the weather.) How many attendees that day paid to get in? How many people attended on that day as guests of the fair organization?



- In the next column under each year (or Five-year average), enter the *fair total* number of paying attendees and the *fair total* number of guests.
- Add highest single day and total fair admissions, paid and complimentary, and record in the bottom row the paid and complimentary totals for each column.

### Volunteers

- This table is merely a numerical display of the contributions made by volunteers to the success of each year's fair. Use narrative sections further on in this report to describe volunteer activities, especially if any particular volunteer activity is *new*.
- Hard data for the number of volunteer *hours* may be difficult to obtain and record, but the person inputting this data can make his or her best guess on an extrapolation of any hard numbers he or she can gather. When writing grant proposals, these numbers will provide a basis for assigning a dollar value to the in-kind contributions volunteers make to the annual fair.

## II. REVENUE, EXPENSES, AND BOTTOM LINE

The displays in this section are set up to support a preliminary analysis of the annual fair's revenue and cost centers. With this information in hand, a fair organization may find it worthwhile at some point in the future to identify centers *within* the broad categories represented in these revenue and expense tables. For example, an organization may want to correlate "people's choice" sales totals (see Section IV on Food) with those vendors' locations on the fairground. This correlation would provide the basis for developing evidence of which rental spaces generate the most revenue and are therefore the most valuable properties. This analysis would justify higher rental rates for specific fairground locations that have higher expected returns.

Ultimately, the details will suggest what a fair organization can do to support the centers that generate the most revenue so as to make them even more profitable. Similarly, they may suggest how to reduce costs in various expense categories.

### Revenue

Enter totals in each row for revenue from this year's fair and last year's fair. If the fair organization has data for the *five* prior years (through last year – do not include this year's revenue in calculating the five-year averages), calculate the average revenue from each source and enter it in the last column. The revenue categories in this table parallel revenue categories on the annual statement of operations to a great extent. However, this table should display *fairtime revenue ONLY*. Add other revenue sources, if any, in the rows left blank (be sure to label these rows).

### Expenses

As in the revenue table, these entries are quite straightforward. Enter totals in each row for expenses from this year's fair and last year's fair. If the organization has data for the *five* prior years (through last year – do not include this year's expenses in calculating the five-year averages), calculate the average expense in each category and enter it in the last column. Again, this table should display *fairtime expenses ONLY*. Add other expense categories, if any, in the rows left blank (be sure to label these rows).

### Bottom line

Did this year's annual fair make money? Did last year's? On average, what has been the annual fair's profit or loss over the past five years? Was this year's performance better or worse than the five-year average? Which line item differences pinpoint where this year's fair did better or worse?



### III. EXHIBITS

The dimensions of the exhibits program describe a portion of local community *participation* in the annual fair. Participation in the fair's exhibits program is one indicator of community relevance and customer satisfaction. Variety in exhibit entry opportunities is an indicator of the fair organization's responsiveness to changing interests.

This section of the CEO's report provides a record of *new* exhibitors every year (or new categories), thereby complementing Section I (exhibitors, attendees, and volunteers). Monitoring and analyzing how these numbers relate to overall participation over time will enable the fair organization to know its fairgoer market segments extremely well – especially if combined with exit surveys that contain specific questions about the exhibits (including *new* and/or one-time only *special* exhibits).

#### Noncompetitive exhibits

- In the blank in the right-hand margin, enter the total number of exhibitors who submitted entries for the noncompetitive community showcase at this year's annual fair.
- In the blank spaces provided (add pages if necessary), enter the name of each new and/or one-time only *special* noncompetitive exhibit or exhibit category.

#### Competitive exhibits

- In the blank in the right-hand margin, enter the total number of exhibitors who submitted entries for the competitive and judged community showcase at this year's annual fair.
- In the blank spaces provided (add pages if necessary), enter the name of each *new* and/or one-time only *special* competitive exhibit or exhibit category.

### IV. FOOD

In exit surveys, fairgoers typically indicate that the largest portion of their expenditures at the fair went for food. Some foods are emblematic of fairs in general – corn dogs, for example, and cotton candy. But what is the fair organization doing to ensure that the annual fair has its own “signature” food item (a popular treat that is available only during fairtime and only at the fair)? Does the fair organization consistently introduce new menu items at the annual fair, making an effort to accommodate people with dietary restrictions, health-conscious consumers, and the truly adventurous?

#### Food variety

- Do not distinguish between foods to eat and “foods” to drink. A booth that sells only beer or only soft drinks, for example, is treated as a food booth in this analysis.
- Enter the booth name of each food vendor – in other words, the business name rather than the name of the individual person(s) with whom the fair organization contracts (the fair organization may want to keep individual owners' names in the supplemental record).
- List all approved menu items and, in the next column, the total *number* (#) of menu items approved for each vendor. (Note that the person compiling this list will probably need to add pages to complete it.)
- Place a check under “yes” or “no” to indicate whether this vendor has sold food at the fair before. If the vendor has sold food at the fair before, but not in the last 10 years, check “yes” under “new this year.” For example, if the vendor sold food at the fair in 1988 but not *since* 1988, and then came back in 1999, check “yes” under “new this year.”



### Fair's food program

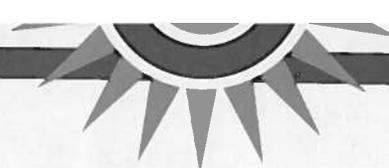
- In the "local" vendors row, enter the number of local restaurants and community service organization food booths.
- In the "circuit" vendors row, enter the number of all non-local food vendors.
- In the "menu items" row, enter the total number of approved individual menu items – not the number of vendors.
- In the "alcohol management program" row, enter "yes" or "no" in the column for this year and last year. If "yes" for this year and last year, then in the "Five-year average" column, enter the date (year) that an alcohol management program was first in place during the fair.

### People's choice: highest total sales

- In the first row, first column, enter the current year for this year's fair.
- In the second column, for the food vendor who had the highest sales total for the run of the fair, enter the vendor's name (booth, or business, name), the menu item(s) sold, and the dollar amount of total sales.
- Enter comparable information in the third and fourth columns – for the second highest and third highest total sales, respectively.
- In the "form of recognition" row, describe what the fair organization did for, or gave to, the food vendors with highest sales to recognize the contribution they made to the success of this year's fair. EXAMPLES: cash award, plaque, certificate, news release.
- Follow the instructions above to enter comparable information for last year.
- In the "five-year history: vendors" row, enter names of all food vendors who produced the highest total sales during the fair for the previous five years – and, in the appropriate column, the second or third highest. If the same vendors show up repeatedly, it may be appropriate to go an extra mile to ensure their continued interest in partnership with the fair organization. For example:
  - Include mention of those vendors by name in general advertising for the next fair.
  - Reduce those vendors' percentage rate for commissions paid to the fair organization during the next fair.
  - Negotiate mutually beneficial cost-sharing plans for co-promotion of the next fair.
  - Provide some other form of special recognition.
- Similarly, in the "five-year history: menu items" row, enter the best, second-best, and third-best selling food items over the past five years. If these food items change over time, this should trigger a review of menus and vendors to ensure fairgoers will find their favorite foods at the next fair.

## V. ENTERTAINMENT

Note that an exit survey will enhance the information gathered for this section of the report – especially if questions on the exit survey ask for feedback on specific strolling and small stage acts and separate admission entertainment acts. If possible, recruit volunteers to count the audience for strolling and small stage acts and the number of participants and spectators at pie eating, grape stomping, and/or other contests – to provide a rough measure of *each one's* popularity.



### Strolling and small stage acts

- This table looks complicated, but its purpose is simple – to record the number and percentage of all strolling and small stage acts that were either local or circuit artists.<sup>1</sup> What was the *total* number of artists this year? Last year? What was the average over the past five years (if known)?
- How much did the fair organization spend this year, in total dollars and what percentage, on local and circuit artists? How does that amount/percentage compare to last year? The five-year average (if known)?

### Separate admission entertainment

- If the fair organization does not book separate admission entertainment, delete this table from the report on the annual fair.
- If the organization books more than one separate admission entertainment act, add as many sets of rows (four per act) as needed.
- In the first column, enter the name of the act on the “Act #1” and “Act #2” rows.
- In the column for this year’s fair *only*, enter the number of *tickets sold* – not necessarily the number of people who attended (unless those numbers are the same). If there were different price categories for tickets for this act, keep a record of that information in the supplemental report. In this table, enter the total number of tickets sold, regardless of price category.
- In the column for this year’s fair *only*, enter total revenue, total cost, and resulting profit or loss.
- Repeat the above for all separate admission entertainment acts.
- For both this year’s fair and the five-year average, in the three bottom rows enter total revenue from *all* separate admission entertainment, total cost, and total profit or loss.

### Contest participants and spectators

- Does the fair have a food eating contest? A grape stomp? List all events individually by name in the first column.
- In the next two columns, enter a checkmark to indicate whether or not this contest was *new* this year: yes or no.
- In the columns for this year and last year, enter the number of participants and the estimated number of spectators – if applicable (obviously, there will be no last year or five-year average data for *new* contests).
- If applicable (and if data is available), enter number of participants and estimated number of spectators for this same event in the five-year average column.
- In the bottom row, enter the number of *new* contests in the “yes” column, the number of continued contests in the “no” column, and the total number of contest participants and spectators in the columns for this year and last year. Leave the five-year average cell blank (the five-year average total may be misleading if there has been significant variation in contests).

## VI. SAFETY AND SECURITY

Throughout the reinvention project, fairgoers and members of the community very consistently identified fairs as a family activity. It was important to them that children, especially, would be safe at the fair. Ensuring public safety and security is one of the fair organization’s highest priority responsibilities.

<sup>1</sup> Throughout this CEO Report on the Annual Fair, “circuit” refers to any non-local vendor, performing artist, or other partner who does business specifically with fairs or other events throughout the state, region, or nation.



### Inspections and corrective actions

- When the health department representative finished his or her pre-fair inspection, did that inspector identify problems that he or she felt were sufficiently serious to issue citations? If there were no citations, place an X or a checkmark in the “None” column under this year. If there were citations, enter the number in the “#” column. Complete that row with data for last year and a five-year average.
- Follow the same steps to complete the next two rows. Add rows, as needed.
- In the last row, indicate whether all health and/or safety problems for which inspectors issued citations had been corrected by opening day of the fair – this year and last year. In the five-year average column, enter the total number corrected by opening day over the past five years (not including this year) and the total number *uncorrected* by opening day over the past five years (not including this year).

### Security readiness

- Indicate with an X or a checkmark whether each of the security readiness indicators was in place this year (yes or no) and, if so, enter in the last column, whether each one was *new* this year (yes or no).
- Add labels to use the blank rows for additional indicators, as applicable.

### Security, medical response, and maintenance personnel

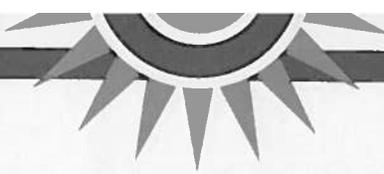
- Ensuring the presence of an adequate number of security, medical response, and maintenance personnel is partly a numbers exercise. In other words, the numbers of personnel on-site in each category should correlate to fluctuations in the numbers of fairgoers present.
- For each category (add rows for additional categories of personnel, as applicable), enter the number of personnel on-site in slow periods and peak hours. What is the *average* number? [To simplify this calculation, add the number for slow periods and peak hours and divide by 2.] If data is available, enter the appropriate numbers in the five-year average column.

### Incidents

Enter the relevant number to provide a record of incidents on the fairground that required either police intervention or medical response.

## VII. PARKING AND SHUTTLE OPERATIONS

Fair organizations sometimes view parking as their worst problem. Indeed, good management of parking and shuttle operations has the potential to make a positive difference in the quality of the fairgoing experience. If the process of arriving at the fairground is relatively easy and pleasant, fairgoers will be ready to perceive their overall experience of the fair as one they want to repeat as often as possible. Similarly, if their departure – when they are tired and ready to go home – is as free as possible of hassle and delay, they will be more likely to want to come back. Even if there is enough space on the fairground to accommodate parking for *all* fairgoers, fair organizations may want to provide shuttle service at least to the parking spaces farthest away from the gate. Patrons will appreciate this attention to their physical comfort.



### Parking

- What is the absolute maximum number of vehicles the on-site parking lot(s) can accommodate? Enter that number in all columns.
- Enter the relevant per vehicle fee to park on-site in all three columns.
- Enter the estimated number of paid vehicles parked during fairtime. Divide total parking revenue by this year's parking fee, last year's parking revenue by last year's parking fee, and so on.
- Enter the total number of parking lot attendants on payroll for entire run of the fair.
- Lighting and signage are essential for safety and ease of returning to one's vehicle. For each parking lot (add rows if the fairground has more than two lots), enter the number of utility lights and the number of section-marking signs.
- If there was adequate and safe space at each gate for a driver to drop off the other members of his or her party, including a member who may be in a wheel chair, enter "yes" in the columns for this year and last year. Since there is no "average" for yes or no, disregard the five-year average column.
- Add other parking experience quality indicators in the blank rows, as applicable.

### Shuttle

- If the fair does not have or need remote parking areas and shuttle transit, delete this section from the report on the annual fair. If the fair provided shuttle service *only* to the farthest reaches of on-site parking lot(s), add a row for this information in the parking table.
- In the first row, enter the number of remote parking lots from which there was shuttle service to the fairground.
- Add up the maximum number of vehicles that all of the remote parking lots – *combined* – can accommodate. Enter the relevant total under each column heading.
- When all available shuttle vehicles are operating, how many are there? Enter that number in the row for total number of shuttle vehicles in operation at peak periods.
- Enter the total number of shuttle vehicle operators on payroll for entire run of the fair.
- Give each shuttle driver a clicker or log sheet to use in counting passengers. Estimate the total number of shuttle passengers by counting all passengers to *and* from the fairground and dividing that number by 2. Enter the relevant result in all columns for that row.
- If the shuttle service was sponsored and underwritten, enter "yes" in the columns for this year and/or last year, as applicable. If the fair organization bore part of the cost of the shuttle operation, enter "partly" in the appropriate columns for this row.
- Add other shuttle service quality indicators in the blank rows, as applicable.

## VIII. FACILITY PLANNING

Stewardship of the fairground and all facilities and improvements on it is the responsibility of every fair organization that owns, leases, or manages its own site on a year-round basis. This responsibility clearly extends beyond fairtime. This tool captures the planning and care-taking responsibility in terms of overall planning and funding as well as readiness of the site for use during the annual fair. Fair organizations without fairgrounds should delete this section.



### Master planning

- If the fair organization has completed a master site plan, enter “yes” under this year and/or last year. If yes, then in the five-year average column, enter the year the master site plan was completed.
- When was the master site plan most recently updated? Enter “yes” if appropriate under this year and/or last year or, as relevant, enter the actual date (year) in the five-year average column.
- If the fair organization requested Major Maintenance Program (MMP) funding from Fairs & Expositions, enter the relevant amounts in each column.
- If the organization *received* MMP funding, enter those amounts in the appropriate columns.
- If the fair organization has racing and/or satellite wagering facilities and received funding from Fairs & Expositions for parimutuel improvement projects (funding from satellite wagering account specifically earmarked for improving racing and satellite wagering facilities), enter the amount(s) in the relevant columns. If the fair organization does not have these facilities, enter “N/A” or delete this row.
- If the fair organization invested in facility improvements from the operating budget, enter the dollar amount(s) in the relevant columns.
- If the organization invested in facility improvements from the operating budget, enter the percentage(s) of total operating budget the investment amount(s) represented.

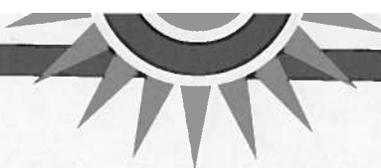
### Fairground facilities and racetrack and/or satellite wagering facility (if applicable)

- List the major maintenance or health and safety projects that have been completed *since* the close of last year’s fair and *in time* for opening day of this year’s fair.
- List projects that were designed to enhance the comfort and/or aesthetic quality of facilities and were completed *since* the close of last year’s fair and *in time* for opening day of this year’s fair.
- Repeat the above for racetrack and/or satellite wagering facility, if applicable. Enter “N/A” or delete this section if the organization does not have these facilities.
- Provide a brief description of *major* improvements in the narrative portion of Section XI on Innovations or Section XII on Evaluation, whichever is more appropriate.

## IX. MARKETING, PROMOTION, AND MARKET PENETRATION

The business success of fairs is a function of three factors: (1) the number of people who attend and participate in the fair, (2) how much the fair organization knows about fairgoers, and (3) how well the fair organization uses and packages knowledge of its own patrons to recruit sponsors and local partners who will invest time, money, and other resources into making each annual fair better than the last. In order for all of these good things to happen, the fair organization must attract new fairgoers every year – to replace fairgoers and fair participants who do not return and those who no longer live in the area. Increasing the number of participants and attendees and learning as much as possible about *all* fairgoers should be goals of the fair organization’s marketing program.

One of the reinvention project products is a marketing guide titled *Grassroots & Commonsense Marketing for the Great Fair*, which is available from Fairs & Expositions. It provides detailed step-by-step instructions for conducting a comprehensive marketing program, especially for small fairs. Tables in this section of the CEO’s report provide a format for documentation of the analysis and activities outlined in the marketing guide. Market research and marketing program data increase in value over time as they reveal and define changes in the local fairgoer market and indicate relative effectiveness of various promotions from year to year. The tables in this section will establish the baseline that will make future year comparisons possible.



### Fairgoer research

- If the fair organization has studied its primary and, if applicable, secondary market areas and identified certain segments of the population that are likely to attend and/or participate in the fair, place an X or checkmark under the appropriate column heading(s).
- If, on the basis of market segmentation studies, the fair organization created and delivered different advertising messages and promotions targeted to the relevant market segments, place an X or checkmark under the appropriate column heading(s).
- If the organization has appointed a board committee or a community advisory committee, or both, to conduct an annual post-fair evaluation, place an X or checkmark under the appropriate column heading(s).
- If the fair organization conducted an exit survey, place an X or checkmark under the appropriate column heading(s).
- If the fair organization conducted a fairtime assessment, place an X or checkmark under the appropriate column heading(s).
- If the organization conducted an exit survey and/or a fairtime assessment and has at least one post-fair evaluation committee, place an X or checkmark under the appropriate column heading(s) if the committee(s) reviewed the exit survey and/or fairtime assessment results.
- Add other fairgoer research evaluation factors in the blank rows, as applicable.

### Advertising expenditures

- In each column (this year, last year, and five-year average), enter the actual (not budgeted) amounts spent for advertising in each medium (print, radio, TV).
- Add other categories of advertising expenditure in the blank rows, as applicable. Include the estimated dollar value of trade-outs (ads published in other organizations' materials in exchange for including those organizations' ads in promotional materials for the fair) and/or in-kind contributions (for example, free advertising in the local newspaper).

### Promotions by the fair organization

- This table records the fair organization's efforts to reach out to the community through communications other than paid advertising.
- If the fair organization created and/or maintained a World Wide Web site and presented regularly updated fair programming and schedule information on this site, enter "yes" in the appropriate columns. In the five-year average column, enter the date (year) that the fair first had a World Wide Web site.
- If the news coverage the fair received *was satisfactory*, enter "yes" in the appropriate columns. To be more quantitative about it, enter the number of column inches of fairtime reporting in local newspaper(s).
- If local broadcast media ran written and/or recorded public service announcements (PSAs) produced by the fair organization, enter "yes" in the appropriate columns. Or, enter the *number of different PSAs* produced (*not* the total number provided to all media outlets).
- If the fair dates and program were publicized by distributing flyers to children through their schools, enter "yes" or the *number of flyers* under each relevant column heading.
- If fair management made personal appearances at community group meetings to promote the fair, enter "yes" or the *number of presentations* made under each relevant column heading.
- If the fair organization sold discount tickets to the fair in advance, enter the *number of advance tickets* sold under each relevant column heading.
- In the next row, enter the *dollar amount of revenue* from pre-fair ticket sales under each relevant column heading.



- If cooperation with fairtime business partners resulted in discount packages, enter the *number* of pre-fair discount packages sold under each relevant column heading. EXAMPLE: “family packages” sold for a single discounted price and including parking, admission, and a hot dog and drink for every member of the family.
- In the next row, enter the *dollar amount of revenue* from pre-fair discount package sales under each relevant column heading. (This will be a portion of advance ticket sale revenue.)

### Best value promotions: the fair deal

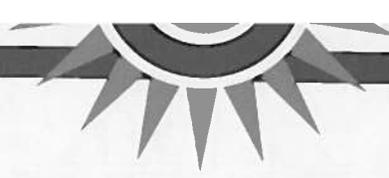
- This table provides a record of actions taken by the fair organization to show recognition of and appreciation for excellent service and value offered by the fair organization’s business partners, in two categories: food and commercial.
- Follow the same instructions for food vendors and commercial (non-food) vendors for this year and last year.
- Enter the name of the vendor (booth, or business, name).
- Briefly describe vendor offer that constituted the “best value” for the run of each year’s fair.
- Briefly describe the recognition provided by the fair organization. EXAMPLES: plaque, certificate, inclusion in the fair’s advertising, inclusion in a news release.

### Market penetration

- The numbers in this table will not be especially meaningful until a fair organization has at least five years’ worth of data. Ultimately, however, this analysis will help identify the extent to which the fair is gradually improving its ability to reach and attract new fairgoers and participants.
- In the top row, enter the geographic definition of the fair’s primary market area. This may be an entire county, a few individual communities within a county, or multiple counties.
- Using data available from local government planning offices and/or local chambers of commerce, enter in the second row the estimated current population of the *primary* market area.
- In the third row, enter the estimated population of the *total* market area, meaning the primary market area plus other surrounding areas from which the fair draws fairgoers.
- In the columns for this year, last year, and five-year average, enter the total *numbers* of attendees, participants, and volunteers and then the *percentages* those numbers represent of the population in the *primary* market area.
- Repeat the above for the *total* market area.

## X. STRATEGIC ALLIANCES

Many individuals, groups, organizations, and businesses are directly involved in a hands-on way in helping the fair organization to produce the annual fair. These helpers volunteer their time and skill, contribute money, and – perhaps most important – find new ways to share the fair experience with neighbors and friends as well as members of the community. In the popular business literature, these kinds of relationships have been termed “strategic alliances.” This section of the CEO Report on the Annual Fair pertains to *this year’s fair only* and documents two types of strategic alliances: sponsorships and project partnerships.



### Sponsorships

- Under the heading for this table, enter the dollar amount of the fair organization's *goal* for sponsorship funding for this year's fair and, in the next blank space, enter the dollar amount of the total sponsorship funding actually *received* (cash only).
- In the first column, fill in each sponsor's name on a separate row.
- In the second column, enter the total dollar amount the fair organization received from each sponsor. If the fair organization had multiple agreements with one sponsor for different dollar amounts, enter the *total* amount for all agreements with that sponsor.
- In the "provided by fair organization" column, enter a brief description of the fair organization's side of the bargain. In exchange for sponsorship funding, what did the fair promise and provide?
- If sponsor was new this year, place an X or checkmark in the "yes" column under "new this year." If the fair organization received sponsorship funding from this sponsor before, but not at all within the last 10 years, place an X or checkmark in the "yes" column.
- Enter total dollar amount of sponsorship funding the fair organization received this year.
- Add rows – or pages – as needed.

### Project partnerships and trades

- In the first column, enter the name on each row of the project partner(s). EXAMPLES: school district, business owner, Rotary Club.
- In the second column, "type of project," briefly describe the project. EXAMPLES: co-hosted an event (which one?), catered a meal for VIP guests of the fair organization, managed design and development of a special exhibit (which one?).
- If this project *partner* was new this year, place an X or checkmark in the "yes" column under "new this year." If this individual or organization has been a project partner for the fair in prior years, but not in the last 10 years, place an X or checkmark in the "yes" column.
- Add rows – or pages – as needed.

## XI. INNOVATIONS

This section of the CEO Report on the Annual Fair is entirely narrative. This is the place to draw attention to all the new ideas the fair organization and partners experimented with at this year's fair. Review the entire report and note every place where "new this year" has been checked. Should the board have more details on this change? If major facility improvements were completed in time for this year's fair, describe those in this section as well.

## XII. EVALUATION

Evaluating the annual fair will become easier with the documentation accumulated in these reports. Other standardized tools are also available to help with this task. This section provides a record of steps the fair organization has taken to evaluate the quality of the annual fair and the extent of fairgoer satisfaction. The narrative content of this section is likely to vary substantially from one year to the next, depending upon what the numbers have to say.

Fairs & Expositions recommends that the fair organization hold a post-fair community meeting every year and invite the public to participate in a discussion of what worked and what didn't and what should be done differently next year. People who attend a post-fair community meeting *really* care about the fair and are likely to volunteer for committee work to plan next year's fair.



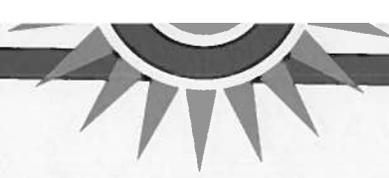
The post-fair community meeting is an essential component of making the annual fair community-relevant. The timing of such a meeting can vary, but it should probably be scheduled for not more than six weeks following the close of the fair. It would be desirable to have this report available for review on that occasion – up to but not including the very last table in this final section.

### Use of standardized tools

- Another tool the reinvention team developed is the “Fairtime Assessment” tool and report. Fair organizations may want to ask someone who is familiar with fairs to complete it, for example, a peer from within the network (CEO, staff person, or board member from another fair) or consultants with fair experience. “Fairtime Assessment” reports from multiple years will allow fair organizations to compare scores and comments from one period to the next, though it is not important to conduct a fairtime assessment every year.
- In the first row, enter the name of the person who completed a fairtime assessment this year, and indicate the person’s affiliation. EXAMPLE: name of the fair organization where the person works or serves on the board of directors, and the location of that fair organization.
- In the second row, enter the name of the person, or firm, that conducted an exit survey this year. EXAMPLE: name of a professor or student or name of the class that managed the exit survey, the school or university with which the individual(s) or class is affiliated, and the location.
- Use the blank row (add others as needed) to record use of any other standardized tool to evaluate the fair.
- It is not necessary to conduct an exit survey every year either. The consultants who performed exit surveys as part of the reinvention study recommended that fair organizations conduct exit surveys every five years. The usefulness of fairtime assessment and exit survey data resides in the changes they document between one point in time and another. Changes are likely to be more easily detectable after periods of longer than one year.
- In the final column, enter the date (year) of the last fairtime assessment and/or exit survey. Also enter the name, affiliation, and location of the person or group that performed this work.

### Compliments and complaints

- Arbitrarily select a period before and after the dates of the fair. EXAMPLE: one or two weeks before and one or two weeks after and definitely *during* the fair. Enter these dates where indicated (under the heading for this table).
- Instruct staff to keep a count of compliments and complaints received during this period – on the fair itself, grounds and facilities, programming, animals, or anything else. Provide generic forms to be kept next to every telephone that will allow staff to tally the compliments and complaints they receive.
- In the “this year,” “last year,” and “five-year average” columns, enter the number of compliment letters and the *number* of compliment phone calls. Calculate that subtotal and enter it in the table. Calculate the *percentage* of compliments that came by letter (divide the number of compliment letters by the total number of compliments) and the *percentage* of compliments received by phone call. Enter those percentages in the table.
- Repeat the above process for complaint letters and phone calls.
- Add the subtotal of compliments to the subtotal of complaints and enter the results in the “total contacts” row.
- For each time period, enter the *percentage* of contacts that were compliments (divide the total number of compliments by the total number of contacts). Enter these percentages.
- Repeat the above process for complaints.



### Post-fair community meeting

- The CEO Report on the Annual Fair will not be complete without the information that goes in the table on the last page. This is the table that provides space for reporting various aspects of the post-fair community meeting.
- In the first row in each column, enter the number of days between the closing day of the fair and the day of the post-fair community meeting.
- On the second row, enter the number of people who attended the post-fair community meeting.
- If the fair organization distributed copies of information pertaining to this year's fair, enter a brief description of it in the rows left blank. EXAMPLES: CEO Report on the Annual Fair, summary of (or excerpts from) the fairtime assessment(s), exit survey report.
- Enter the number of volunteers signed up and working on committees to plan next year's fair, as of the day after the post-fair community meeting.

### CEO's comments on and interpretation of the numbers in this report

- The narrative portion of the evaluation section provides an opportunity for the CEO to write the story that all the numbers in this report tell – in other words, his or her interpretation of all the numbers.
- The sky's the limit, but here are some possible categories for comment:
  - Unexpected high profile events, positive or negative, during the run of the fair.
  - Especially positive or especially negative news coverage.
  - *Content* of the best compliments and worst complaints.
  - Effectiveness of the fair organization's efforts to respond to complaints from the previous year.
  - New types of activities or responsibilities managed by volunteers.
  - Especially costly and/or noticeable facility repairs or improvements.



# CEO REPORT ON THE ANNUAL FAIR

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Name of fair

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Year of fair

**prepared for**  
**THE BOARD OF DIRECTORS**

## List of Worksheets

- I. Exhibitors, Attendees and Volunteers
- II. Revenue, Expenses and Bottom Line
- III. Exhibits
- IV. Food
- V. Entertainment
- VI. Safety and Security
- VII. Parking and Shuttle Operations
- VIII. Facility Planning
- IX. Marketing, Promotion and Market Penetration
- X. Strategic Alliances
- XI. Innovations
- XII. Evaluation



# CEO REPORT ON THE ANNUAL FAIR

## I. EXHIBITORS, ATTENDEES, AND VOLUNTEERS

EXHIBITORS			
	This year:	Last year:	Five-year average:
Noncompetitive #1:			
Noncompetitive #2:			
Noncompetitive #3:			
Noncompetitive #4:			
Noncompetitive #5:			
Noncompetitive: <b>Total</b>			
Competitive #1:			
Competitive #2:			
Competitive #3:			
Competitive #4:			
Competitive #5:			
Competitive: <b>Total</b>			
<b>Total all categories</b>			



### ATTENDEES

	This year:		Last year:		Five-year average:	
	Highest single day Date:	Fair total	Highest single day Date:	Fair total	Highest single day	Fair total
Paid						
Complimentary						
<b>Total</b>						

### VOLUNTEERS

	This year:	Last year:	Five-year average:
Number of volunteers			
Number of volunteer hours			
Number of <i>new</i> volunteers			

# CEO REPORT ON THE ANNUAL FAIR

## II. REVENUE, EXPENSES, AND BOTTOM LINE

REVENUE			
	This year:	Last year:	Five-year average:
Admissions	\$	\$	\$
Attractions, entertainment			
Concessions			
Exhibits			
Horse racing (fairtime parimutuel)			
Horse racing (satellite wagering)			
Horse show			
Industrial and commercial space			
Merchandising <sup>1</sup>			
Parking operations			
Sponsorships			
Other:			
Other:			
Miscellaneous			
<b>Totals</b>	<b>\$</b>	<b>\$</b>	<b>\$</b>

<sup>1</sup> Refers to items bearing the fair organization's logo sold during fairtime (t-shirts, mugs, caps, and so on).

**EXPENSES**

	This year:	Last year:	Five-year average:
Advertising, publicity	\$	\$	\$
Attendance operations			
Attractions, entertainment			
Board events, expenses			
Concessions			
Exhibits <sup>2</sup>			
Horse racing (fairtime parimutuel)			
Horse racing (satellite wagering)			
Horse show			
Judges			
Maintenance			
Merchandising <sup>3</sup>			
Parking operations			
Promotions			
Security operations			
Signage			
Other:			
Other:			
Miscellaneous			
<b>Totals</b>	<b>\$</b>	<b>\$</b>	<b>\$</b>

**BOTTOM LINE**

	This year:	Last year:	Five-year average:
Revenue			
Expenses			
<b>Profit OR (Loss)</b>	<b>\$</b>	<b>\$</b>	<b>\$</b>

<sup>2</sup> Include grants to community organizations, training materials and workshops, cash awards, or other prizes.

<sup>3</sup> Include cost of logo-bearing items for sale during fairtime, plus amount earmarked for a specific fair-related cost or identified community need.



# CEO REPORT ON THE ANNUAL FAIR

## III. EXHIBITS

**Total Noncompetitive Exhibit Entries This Year:** \_\_\_\_\_

*New or one-time only special exhibits or categories this year:*

_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

**Total Competitive Exhibit Entries This Year:** \_\_\_\_\_

*New or one-time only special exhibits or categories this year:*

_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____





# CEO REPORT ON THE ANNUAL FAIR

## IV. FOOD

### FOOD VARIETY

[Create back-up pages if necessary and bring totals forward to this sheet.]

Vendor's name	Menu items	#	New this year	
	List		Yes	No
<b>Totals</b>				

### FAIR'S FOOD PROGRAM

	This year:	Last year:	Five-year average:
Number of local food booths/vendors.			
Number of circuit food booths/vendors.			
Number of menu items.			
Alcohol management program.	YES/NO	YES/NO	1st year _____



**PEOPLE'S CHOICE**  
Highest Total Sales

	#1: Highest Sales	#2: 2nd Highest Sales	#3: 3rd Highest Sales
This year:	Vendor's name: Menu item(s): Total sales: \$ _____	Vendor's name: Menu item(s): Total sales: \$ _____	Vendor's name: Menu item(s): Total sales: \$ _____
Form of recognition			
Last year:	Vendor's name: Menu item(s): Total sales: \$ _____	Vendor's name: Menu item(s): Total sales: \$ _____	Vendor's name: Menu item(s): Total sales: \$ _____
Form of recognition			
Five-year history: vendors			
Five-year history: menu items			



# CEO REPORT ON THE ANNUAL FAIR

## V. ENTERTAINMENT

### STROLLING AND SMALL STAGE ACTS

	This year:		Last year:		Five-year average:	
	# / \$	% of total	# / \$	% of total	# / \$	% of total
Number of local artists						
Number of circuit <sup>4</sup> artists						
<b>Total artists</b>		%		%		%
Fees for local artists						
Fees for circuit artists						
<b>Total fees</b>	\$	%	\$	%	\$	%

### SEPARATE ADMISSION ENTERTAINMENT

	This year:	Five-year average:
Act #1:		
Number of tickets sold		
Revenue		
Cost		
<b>Profit OR (Loss)</b>	\$	
Act #2:		
Number of tickets sold		
Revenue		
Cost		
<b>Profit OR (Loss)</b>	\$	
<b>Total revenue</b>	\$	\$
<b>Total cost</b>	\$	\$
<b>Total Profit OR (Loss)</b>	\$	\$

<sup>4</sup>Throughout this CEO Report on the Annual Fair, "circuit" refers to any non-local vendor, performing artist, or other partner who does business specifically with fairs or other events throughout the state, region or nation.



### CONTEST PARTICIPANTS AND SPECTATORS

	New this year:		This year:	Last year:	Five-year average:
	Yes	No			
Event #1:					
Participants					
Spectators					
Event #2:					
Participants					
Spectators					
Event #3:					
Participants					
Spectators					
Event #4:					
Participants					
Spectators					
Event #5:					
Participants					
Spectators					
Event #6:					
Participants					
Spectators					
Event #7:					
Participants					
Spectators					
Event #8:					
Participants					
Spectators					
<b>Totals</b>					



# CEO REPORT ON THE ANNUAL FAIR

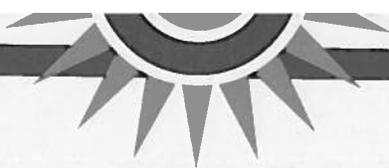
## VI. SAFETY AND SECURITY

### INSPECTIONS AND CORRECTIVE ACTIONS

	This year:		Last year:		Five-year average:	
	None	#	None	#	None	#
Health department citations						
Carnival safety citations						
CFSA safety inspection citations						
Other:						
Other:						
All health/safety problems corrected by opening day.	Yes	No	Yes	No	Total # Correc.	Total # Uncorr.

### SECURITY READINESS

	This year:		New this year:	
	Yes	No	Yes	No
Board-approved emergency/crisis preparedness plan is in place.				
All public safety agencies in our market area have a copy of our preparedness plan and know what, if anything, we expect of them.				
Metal detector at admissions gate during fairtime.				
Other:				
Other:				
Other:				



### SECURITY, MEDICAL RESPONSE, AND MAINTENANCE PERSONNEL

	This year:			Five-year average:		
	Slow Periods	Peak Hours	Avg.	Slow Periods	Peak Hours	Avg.
Number of security personnel on-site during fair.						
Number of medical response personnel on-site during fair.						
Number of maintenance personnel on-site during fair.						
Other:						

### INCIDENTS

	This year:	Last year:	Five-year average:
Number of fairtime incidents that require police/sheriff intervention.			
Number of fairtime arrests.			
Number of incidents that required medical response/intervention.			
Number of incidents that required ambulance service.			
Other:			
<b>Totals</b>			



# CEO REPORT ON THE ANNUAL FAIR

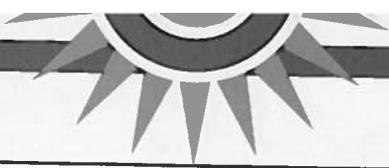
## VII. PARKING AND SHUTTLE OPERATIONS

### PARKING

	This year:	Last year:	Five-year average:
Parking capacity at any one time (# of spaces).			
Parking fee per vehicle.	\$	\$	\$
Number of vehicles parked (total parking revenue divided by parking fee per vehicle).			
Total number of parking attendants.			
Parking lot #1: number of utility lights.			
Parking lot #2: number of utility lights.			
Parking lot #1: number of section-marking signs.			
Parking lot #2: number of section-marking signs.			
Safe drop-off area by every gate.	YES / NO	YES / NO	
Other:			

### SHUTTLE

	This year:	Last year:	Five-year average:
Number of remote parking lots served by shuttle.			
Total parking capacity at all remote lots, combined.			
Total number of shuttle vehicles in operation at peak periods.			
Total number of shuttle vehicle operators.			
Total number of shuttle passengers, derived from records on log sheet (to and from, divided by 2).			
Shuttle service sponsored by local transit company or other entity.	YES / NO	YES / NO	
Other:			
Other:			



# CEO REPORT ON THE ANNUAL FAIR

## VIII. FACILITY PLANNING

### SITE PLAN

	This year:	Last year:	Five-year average:
Master site plan (MSP) is on file.	YES / NO	YES / NO	Year MSP Completed: _____
Most recent update of master site plan.	YES / NO	YES / NO	Year MSP Updated: _____
Amount of MMP funding <i>requested</i> from F&E.	\$	\$	\$
Amount of MMP funding <i>received</i> from F&E.	\$	\$	\$
Amount of parimutuel improvement project funding received from F&E (if applicable).			
Investment in facilities from fair organization operating budget – dollar amount.	\$	\$	\$
Percentage of operating budget for investment in facilities.	%	%	%

### FAIRGROUND FACILITIES

Major maintenance or health and safety projects started since last year's fair and completed in time for this year's fair:

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_



Projects to enhance the comfort and/or aesthetic quality of facilities started since last year's fair and completed in time for this year's fair:

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**RACETRACK AND/OR SATELLITE WAGERING FACILITY**  
(if applicable)

Major maintenance or health and safety projects started since last year's fair and completed in time for this year's fair:

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---

Projects to enhance the comfort and/or aesthetic quality of facilities started since last year's fair and completed in time for this year's fair:

---

---

---

# CEO REPORT ON THE ANNUAL FAIR

## IX. MARKETING, PROMOTION, AND MARKET PENETRATION

### FAIRGOER RESEARCH

	This year:		Last year:	
	Yes	No	Yes	No
Defined (identified and quantified) market segments.				
Targeted specific advertising messages and promotions to defined market segments.				
Full board and/or board committee conducted post-fair evaluation meeting.				
Conducted post-fair community meeting to invite public to help evaluate the fair.				
Conducted exit survey.				
If exit survey conducted, survey results distributed to fair evaluation and planning committee(s).				
Conducted fairtime assessment(s).				
If fairtime assessment(s) conducted, summary or excerpts distributed to fair evaluation and planning committee(s).				
Other:				

### ADVERTISING EXPENDITURES

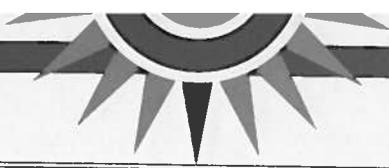
	This year:	Last year:	Five-year average:
Print	\$	\$	\$
Radio			
Television			
Other:			
Other:			
<b>Totals</b>	\$	\$	\$

### PROMOTIONS BY THE FAIR ORGANIZATION

	This year:		Last year:		Five-year average:	
	Yes or #	No	Yes or #	No	Yes or #	No
Maintained World Wide Web site.					1st year _____	
Free media ( <i>satisfied</i> with news coverage).						
Free media (fair-produced PSAs).						
Flyers distributed through schools.						
Presentations to local groups.						
Total tickets sold in advance.						
Total advance ticket sale revenue.	\$		\$		\$	
Pre-sales: packages promoted in cooperation with partners.						
Discount and package pre-sale revenue.	\$		\$		\$	

### BEST VALUE PROMOTIONS: THE FAIR DEAL

	This year:	Last year:
<b>FOOD</b>		
Vendor/booth name		
Offer		
Form of recognition		
<b>COMMERCIAL (non-food)</b>		
Vendor/booth name		
Offer		
Form of recognition		



## MARKET PENETRATION

Our primary market area is:

Estimated population in our *primary* market area

Estimated population in our *total* market area

	This year:		Last year:		Five-year average:	
	#	%	#	%	#	%

### PRIMARY MARKET AREA

Attendees						
Exhibitors						
Volunteers						

### TOTAL MARKET AREA

Attendees						
Exhibitors						
Volunteers						





# CEO REPORT ON THE ANNUAL FAIR

## X. STRATEGIC ALLIANCES

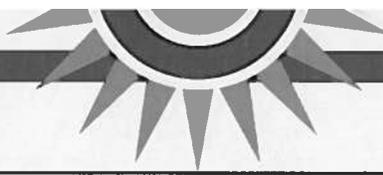
### SPONSORSHIP

Goal for this year: \$ \_\_\_\_\_ Total amount received: \$ \_\_\_\_\_

Sponsor's name	Sponsorship amount	Provided by fair organization	New this year	
			Yes	No
Total	\$			

### PROJECT PARTNERSHIPS AND TRADES

Name of partner	Type of project	Provided by fair organization	New this year	
			Yes	No



# CEO REPORT ON THE ANNUAL FAIR

## XI. INNOVATIONS

CEO's list and/or description of everything that was new at this year's fair:





# CEO REPORT ON THE ANNUAL FAIR

## XII. EVALUATION

### USE OF STANDARDIZED TOOLS

	This year:	Date (year) last conducted:
Conducted fairtime assessment.	Name:  Affiliation:	Year:  Name:  Affiliation:
Conducted fairgoer exit survey.		
Other:		

### COMPLIMENTS AND COMPLAINTS

From: \_\_\_\_\_ [date] through \_\_\_\_\_ [date]

	This year:		Last year:		Five-year average:	
	#	%	#	%	#	%
Compliment letters						
Compliment phone calls						
<b>Compliment Subtotals</b>		100%		100%		100%
Complaint letters						
Complaint phone calls						
<b>Complaint Subtotals</b>		100%		100%		100%
<b>Total Contacts</b>		100%		100%		100%
Percent Compliments		%		%		%
Percent Complaints		%		%		%



### POST-FAIR COMMUNITY MEETING

	This year:	Last year:	Five-year average:
Number of days from last day of fair.			
Number of attendees.			
Types of information distributed.			
Information distributed.			
Number of volunteers working <i>now</i> to improve next year's fair.			

**CEO's comments on and interpretation of the numbers in this report:**

# SELF-ASSESSMENT FOR FAIR BOARD MEMBERS

## OVERVIEW

Are you a good board member? Is the board of directors on which you serve an effective board?

This tool is designed to help you, as an individual director, assess your knowledge of your fair organization's capacity and operational effectiveness. It will also help you evaluate your own performance as the policy-setter and decision maker your fair organization needs you to be.

## INSTRUCTIONS FOR COMPLETING THIS SELF-ASSESSMENT CHECKLIST

The checklists measure positive performance. Thus, every "yes" response counts as "1," whereas every "no" response – as well as every "don't know" or "not applicable" – counts as "0." The third checklist assigns different point values to "always," "usually," "sometimes," or "rarely" ("don't know" or "not applicable" again count as "0").

All of the checklists have blank "other" rows to allow you to customize this tool by writing in additional factors that relate to circumstances that may be unique to your fair organization and board.

## CHECKLIST #1: PERFORMANCE ASSESSMENT OF THE FAIR ORGANIZATION AND BOARD

This checklist records an assessment of your awareness and knowledge of your fair organization's jurisdiction (its powers and authorities) and the board's responsibilities. Another purpose of this checklist is to *increase* your awareness of matters for which the board of directors is responsible.

- Read each row and place an X or checkmark in the appropriate right-hand column.
- "D/K" means "I don't know."
- "N/A" means "not applicable to our fair organization." For example, if your fair organization does not own, lease, or manage its own fairground year-round, place an X or checkmark in the "N/A" column in every row for questions pertaining to facilities.
- The bottom row on each page provides space for "*page subtotals*." Count the number of X's or checkmarks in each column and enter those numbers in the relevant columns across the bottom row.
- The very last row for this checklist provides space for "*grand totals*." For this row, add together all of the page subtotals and enter those numbers in the columns across the bottom row.



## CHECKLIST #2: ASSESSMENT OF MY OWN PERFORMANCE, PART A

This checklist provides an opportunity for you to measure your own progress in various board responsibility categories.

- Read each row and place an X or checkmark in the appropriate right-hand column. Note that there will be *two* responses on each row – one for “last year” and one for “this year.”
- “D/K” means “I don’t know.”
- “N/A” means “not applicable.” For example, if this is your first year as a member of this board, place an X or checkmark in *every* row under the “DK” or “N/A” column heading for “last year.”
- The bottom row on each page provides space for “*page subtotals.*” Count the number of X’s or checkmarks in each column and enter those numbers in the relevant columns across the bottom row.
- The very last row for this checklist provides space for “grand totals.” Add the page subtotals and enter those numbers in the columns across the bottom row.

## CHECKLIST #3: ASSESSMENT OF MY OWN PERFORMANCE, PART B

As noted earlier, the third checklist gives you the opportunity to evaluate the frequency with which you complete or adhere to the indicator described.

- Read each row and place an X or checkmark in the appropriate right-hand column. Note that this checklist asks you to evaluate *how often* you complete the described action, and each response has a different point value.
- As before, “N/A” means “not applicable.” For example, if you have never been contacted directly by a reporter, you would not have had occasion to refer such a contact to the fair organization’s official spokesperson, so you would place an X or checkmark in the “N/A” column on that row.
- The bottom row on each page provides space for “*page subtotals.*” Count the *number* of X’s or checkmarks in each column and enter those numbers – *not* the point values – in the relevant columns across the bottom row.
- The very last row for this checklist provides space for “grand totals.” For this row, add together all the page subtotals and enter those *numbers* – *not* the point values – in the columns across the bottom row.

## CALCULATING YOUR SCORE

When you have completed all sections of Checklists 1 through 3 that apply to you and/or your fair organization, enter your “scores” in the box on the cover page.

- In the row for Checklist #1, write the *total number* of “yes” responses you checked under the column heading “Score.”
- In the row for Checklist #2, write the *total number* of “yes” responses you checked under the column heading “Score.”
- In the row for Checklist #3, write the total number of X’s or checkmarks you made in the column under the heading “Always” in the indicated space. Multiply that number times 4 and enter the result under the column heading “Total.” Repeat for “Usually,” “Sometimes,” “Rarely.” Then add all four numbers in the “Total” column and enter that number in the final right-hand column under the heading “Score.”
- Add all numbers in the right-hand column and enter the result in the last row. That number is your “Total Score.”

## MEANINGFUL MEASUREMENT

This tool is not intended to become a public document (note that every page contains the wording “internal working document” at the top, meaning that you are not required to share your self-assessment with *anyone*). But your own individual score will be more meaningful if you have some idea where it falls among other directors’ scores. Otherwise, it will be difficult to know whether your score is “high” or “low” or somewhere in between.

If as a board, the directors decide to compare scores, it is important to come to agreement about what should be written into each “other” row. Different uses of the “other” rows will prevent meaningful comparison.

Also, consider the following procedures to increase the meaningfulness of self-assessment scores:

- Upon completing the self-assessment checklist process, the board president may ask every board member to write his or her score on a piece of paper – without writing his or her name. The board president will then collect all scores, add them together, and calculate the average self-assessment score. He or she will then provide this information back to the full board: average and range (highest score and lowest score).

### AND/OR

- Every board member will complete a self-assessment checklist annually and keep his or her own file of annual documents. This will allow each board member to see where he or she has made progress as well as identify areas that may still need improvement.

## Internal Working Document

**BOARD OF DIRECTORS****JURISDICTION AND RESPONSIBILITIES**

## Self-assessment Checklist

Fair organization: _____			
Date of assessment: _____			
Secton			Score
Checklist #1: Performance assessment of the fair organization and board (enter total number of "yes" responses).			
Checklist #2: Assessment of my own performance <u>Part A</u> (enter total number of "yes" responses for both last year and this year).			
Checklist #3: Assessment of my own performance, <u>Part B</u> (enter score by using the guidelines below).			
	Number	Multiplier	Total
Always		X4	
Usually		X3	
Sometimes		X2	
Rarely		X1	
<b>TOTAL SCORE</b>			

Internal Working Document

**Checklist #1  
PERFORMANCE ASSESSMENT OF THE FAIR ORGANIZATION  
AND BOARD**

	Yes	No	D/K	N/A
<b>ANNUAL FAIR</b>				
In my opinion, our fair needs no improvement – it is good enough the way it is.				
We have installed an alcohol management program during fairtime.				
We host and publicize an annual post-fair community meeting, open to the public, so we can hear directly from people what they liked or didn't like about the fair and improvements they want to recommend.				
Other:				
Other:				
<b>FACILITIES</b>				
In my opinion, our facilities need no improvement – they are good enough the way they are.				
Our facilities are in compliance with requirements of the Americans with Disabilities Act.				
Our facilities are in compliance with local and state environmental, health, and safety laws and regulations.				
We have a master site plan that includes a sequenced plan for improving our facilities.				
Other:				
Other:				
<b>ADMINISTRATIVE COMPLIANCE</b>				
Our annual budget was submitted on time this year.				
Our major maintenance plan was submitted on time this year.				
We pay our payroll taxes on time.				
We are up-to-date with all payroll taxes.				
The totals for accrued compensated absences are being accrued at regular intervals (monthly, quarterly, or semi-annually).				
Capital outlay funds are being correctly used and accounted for.				
We have responded to exceptions noted in the last audit report.				
We have implemented all recommendations in the last audit report.				
Other:				
<i>Page Subtotals</i>				

Internal Working Document

**Checklist #1**  
**PERFORMANCE ASSESSMENT OF THE FAIR ORGANIZATION**  
**AND BOARD**

	Yes	No	D/K	N/A
<b>FINANCIAL MANAGEMENT PRACTICES</b>				
Our budget projects <i>less</i> revenue than we actually receive.				
Our budget projects <i>more</i> revenue than we actually receive.				
Our budget projects <i>lower</i> expenditures than we actually make.				
Our budget projects <i>higher</i> expenditures than we actually make.				
All bank accounts have been reconciled to the date of last month's financial statements.				
We are current with accounts payable.				
Receivables: All monies due to the fair organization are being collected in a timely manner.				
Receivables: We have no bad, or doubtful, accounts.				
Receivables: Responsibility for credit control and receivables collection is clearly assigned.				
We maintain a prudent financial reserve.				
We purchase revenue interruption insurance.				
We purchase directors' liability insurance.				
We have sponsorship agreements with local businesses.				
We have sponsorship agreements with national or international companies.				
We requested funding in our major maintenance plan (MMP) this year.				
F&E approved our MMP funding request.				
We applied for a revenue generating grant from F&E this year.				
F&E approved our revenue generating grant application.				
We applied for a loan from F&E's loan fund this year.				
F&E approved our loan application.				
We applied for a loan from a bank in our community.				
The bank approved our loan application.				
We have a line of credit at a bank in our community.				
Our accounting records are automated.				
We have established a fund development organization with a board of directors that is independent of the fair organization's board.				
We have established an endowment fund for the fair organization, with a board of trustees that is independent of the fair organization's board of directors.				
<i>Page Subtotals</i>				

Internal Working Document

Checklist #1

**PERFORMANCE ASSESSMENT OF THE FAIR ORGANIZATION AND BOARD**

	Yes	No	D/K	N/A
Other:				
Other:				

**CITIZENSHIP**

We have a structured orientation process for new directors as they are appointed to our board.				
Our fair organization is a member in good standing of Western Fairs Association.				
If applicable, our fair organization is a member in good standing of the California Authority of Racing Fairs.				
Other:				
Other:				

**STRATEGIC PLANNING**

We created or revisited our strategic plan this year.				
We have an annual board retreat, away from the fairground, during which we update our strategic plan.				
We have written a statement of what we want the fair to be within five years.				
We have a funding strategy and business plan for raising the capital we will need to make our five-year vision a reality.				
We have geographically defined our primary market area.				
We have produced a demographic profile of the entire population in our <i>primary</i> market area.				
We have geographically defined our <i>total</i> market area (primary market area, plus surrounding areas).				
We have produced a demographic profile of the entire population in our <i>total</i> market area.				
<i>Page Subtotals</i>				



## Internal Working Document

### Checklist #1

## PERFORMANCE ASSESSMENT OF THE FAIR ORGANIZATION AND BOARD

	Yes	No	D/K	N/A
We have produced a demographic profile of fairgoers who attend our fair.				
We have a database and analytical profiles that describe the <i>social</i> impact our fair has on this community.				
We have a database and analytical profiles that describe the <i>economic</i> impact our fair has on this community.				
Other:				
Other:				
<b>COMMUNITY OUTREACH</b>				
We have distributed our five-year vision statement and fund development strategy to state and local elected officials and local planning agencies.				
We have distributed our five-year vision statement and fund development strategy to our local and circuit business and project partners.				
We have provided data and analysis on our fair's <i>social</i> impact to state and local elected officials and local government planning agencies.				
We have provided data and analysis on our fair's <i>economic</i> impact to state and local elected officials and local government planning agencies.				
We created our master site plan in collaboration with our community by inviting the public to participate in our planning process.				
Our board has a multicultural fair planning committee that meets with community organizations to help them plan their participation in the fair.				
<b>BOARD/CEO RELATIONS</b>				
Our board annually evaluates the CEO's performance against goals and criteria mutually agreed upon by the board and CEO.				
We communicate the results of our evaluation to the CEO.				
Other:				
<i>Page Subtotals</i>				
<b>GRAND TOTALS</b> (add all Checklist #1 Page Subtotals)				

Internal Working Document

Checklist #2

**ASSESSMENT OF MY OWN PERFORMANCE**

**PART A**

	Last Year			This Year		
	Yes	No	D/K or N/A	Yes	No	D/K or N/A
<b>ANNUAL FAIR</b>						
I attended some part of every day during the run of the fair.						
During the fair, I had conversations with fairgoers I didn't know so I could solicit unbiased feedback on what people liked and didn't like about the fair.						
I wrote down fairgoer comments that I found most compelling and reported them at the first post-fair board meeting.						
I completed a fairtime assessment, using the form provided by F&E to record my personal observations.						
Other:						
Other:						
<b>COMMUNITY OUTREACH</b>						
I made an oral presentation to other organizations to which I belong to invite members of those organizations to attend the fair.						
I made an oral presentation to other organizations to which I belong to invite members of those organizations to make a financial contribution to the fair organization.						
Other:						
Other:						
<i>Page Subtotals</i>						



## Internal Working Document

### Checklist #2

## ASSESSMENT OF MY OWN PERFORMANCE

### PART A

	Last Year			This Year		
	Yes	No	D/K or N/A	Yes	No	D/K or N/A
<b>BOARD MEMBER CITIZENSHIP</b>						
I was a member of at least one board committee.						
I chaired a board committee.						
I was an elected officer of the board.						
I know who was our fair organization's official spokesperson.						
I know our fair organization's mission statement by heart.						
I read or reviewed our fair organization's bylaws.						
I received training regarding how to define and prevent sexual harassment (check "yes" under "last year" if you participated in this training longer than a year ago).						
I have made a contribution to our fair's endowment fund (check "yes" under "last year" if you made a contribution longer than a year ago).						
Other:						
Other:						
<i>Page Subtotals</i>						
<b>GRAND TOTALS</b> (add all Checklist #2 Page Subtotals)						



Internal Working Document

Checklist #3

**ASSESSMENT OF MY OWN PERFORMANCE**

**PART B**

	Always 4	Usually 3	Some- times 2	Rarely 1	N/A 0
<b>ANNUAL FAIR</b>					
I attend some part of every day during the run of the fair.					
I visit at least one other fair during the year.					
I attend the post-fair community meeting.					
Other:					
Other:					
<b>BOARD MEMBER CITIZENSHIP</b>					
I have a copy of the <i>Handbook for Fair Board Directors</i> , issued by F&E, and I refer to it or the bylaws <i>first</i> , whenever I have a question about board procedures and responsibilities.					
I attend board meetings faithfully.					
I know and follow the open meeting laws that apply to our fair organization.					
I participate in discussions at board meetings.					
Before each board meeting, I read the minutes from the previous meeting.					
I refer any media inquiries that may come directly to me to our fair organization's official spokesperson.					
I read the annual financial audit report and management letter pertaining to our fair organization.					
I make an annual financial contribution to support our fair organization's operating budget.					
<i>Page Subtotals</i>					



## Internal Working Document

### Checklist #3

### ASSESSMENT OF MY OWN PERFORMANCE

#### PART B

	Always	Usually	Sometimes	Rarely	N/A
	4	3	2	1	0
I attend Western Fairs Association's annual convention so I can meet other directors and keep up on what's new in the fair business.					
Other:					
Other:					
<i>Page Subtotals</i>					
<b>GRAND TOTALS</b> (add all Checklist #3 Page Subtotals)					



# INSIGHTS FROM THE OUTSIDE: ORGANIZATIONAL ASSESSMENT THROUGH INTERVIEWS

## OVERVIEW

A fair organization seeking to change in fundamental or incremental ways toward an ultimate outcome benefits from an in-depth organizational assessment before determining the course of change. Assessment interviews are an essential research tool in the field of organizational development and change management. Comments from interviews with many individuals from diverse perspectives tell the story that indicates a need for change and sets a context for how to proceed. Interview findings can be particularly valuable when supported with empirical data; in fact, they often weave a context that makes empirical data understandable.

The reinvention project team conducted more than 120 assessment interviews with fair organization directors, staff, and community members (including several with the same people one, two, or three years later). In the process, the team gained insights critical to the general project findings and unique development opportunities at the specific pilot sites.

Affectionately, the reinvention project team came to call the perspectives of community members, “outsiders’ *insights*.” The insights of fair board directors and staff were equally valuable, but they often reflected assumptions the organization had adopted or inherited. Recognizing and then challenging these assumptions became possible only by comparing them with what other key stakeholders had to say as outsiders looking in. After reading outsiders comments regarding a significant issue that the fair organization had failed to address, it was not uncommon for board members to say, “It’s not that we didn’t know that was true; it’s just that we had convinced ourselves that no one else had noticed or cared.”

## The tool

“Insights from the Outside” explains the idea of assessment interviews and provides guidelines for fair organizations for how to choose interviewers, interviewees, and questions the interviewer should pose as well as how to respond to the interview findings. It also provides guidelines for interviewers for scheduling and conducting the interviews, and then for preparing a report of findings.

Following the guidelines, “Insights from the Outside” includes:

***Interviews Report template*** The Interviews Report template is intended to help interviewers prepare an analytical report of the interviews for the organization’s response.

***Interviews Response worksheets*** The Interviews Response worksheets are intended to guide the fair organization (CEOs and fair board directors, particularly) through a process that will help to determine how best to use the interview findings.



### What is an “assessment interview?”

A lot of ways to conduct interviews exist. For example, during a survey interview, attendance to a rigorous protocol is necessary to ensure the integrity of otherwise subjective data. During a job interview, a certain degree of testing and evaluation is necessary to determine which candidate is the best fit for the position. In a journalistic interview, the interviewer looks for the story in whatever the interviewee is saying, pursuing certain threads, sometimes even seeking to elicit very specific information the interviewer believes the interviewee may have.

Perhaps assessment interviews are most like the latter. Certainly, they have components of all of the above. But at the same time, they also present a unique discipline of interviewing. In an assessment interview, the interviewer’s only agenda is to explore the interviewees’ ideas, history, or feelings about a particular topic. It is a hunt for the interviewees’ most candid opinions and reflections on an issue of concern.

Unlike a survey interview, the interviewer does not ask only pre-selected questions; however, he or she does maintain certain protocols to ensure that enough data is collected on similar subjects to allow for the comparison and contrast of the interviewees’ viewpoints.

Unlike a job interview, it is not the point of an assessment interview to enable the interviewer to judge the character or skills of the interviewee. Similar to a job interview, however, some of the early questions in an assessment interview should help establish the credibility and bias of the interviewee. Also as in a job interview, the interviewer watches for certain phrasing or body language that may suggest there is more to a story or explanation to be drawn out.

As in the journalistic interview, the interviewer has developed questions on a specific topic, but he follows threads of the interviewee’s responses that seem most interesting, asking new questions that require the interviewee to refine an idea, or describe a situation in greater detail. It is very important that the interviewer not probe for substantiation of his or her own idea or perspective.

## GUIDELINES FOR FAIR ORGANIZATIONS

The first steps in the process of preparing to conduct assessment interviews must be taken by the fair organization:

### Identify the purpose of the interview

What are you assessing and why? Assessment interviews need to assess *something*. Likely concerns include the organization’s future, the fair’s relevance to the community, new uses for the fairground, internal and external support for converting the fairground to a conference center, perception of the organization in the community, all of the above or something else entirely. Any one or all of such concerns are suitable topics for assessment interviews.



### Select the interviewer(s)

Because it is important for the interviewees to feel free to be candid, the ideal interviewer will be someone who listens well, is approachable and friendly, and a person whom the interviewees do not perceive as having authority to change or alter their relationship with the fair organization. Also, the greater the interviewer's neutrality, the more likely he or she will:

- a. Gain the trust of the interviewees.
- b. Draw conclusions based on what is disclosed in the interviews, rather than on what he or she already knows about the fair organization.

The reinvention project team recommends using at least two interviewers who will conduct some interviews together and some on their own. Give each interviewer a copy of the "Guidelines for Interviewers" and the Interviews Report template.

### Select the interviewees

The question to ask in creating the interviewee list is, "Who can and will contribute useful information?" After creating a list of people who will have something to contribute to the purpose of your organizational assessment, select people with a diverse range of experience with the fair organization and community. To gain "insights from *the outside*," select community members with different kinds of relationships to the organization and to the community. For example, consider volunteers, vendors, sponsors, exhibitors, patrons, government officials, business owners, or nonprofit executives for your interviewee list.

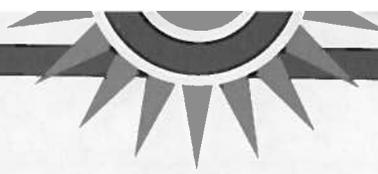
### Select the questions

This is a task for which the fair organization may want to ask for the interviewers' assistance. In fact, it is very important that the interviewers feel comfortable with the questions that they will be asking. However, to get the information you need to make decisions about the organization's future from the assessment interviews, it is equally important that you – the fair organization board of directors, CEO, or staff – participate in selecting the questions the interviewer will ask.

Below are some sample questions for fair organizations that want to conduct a general assessment of their strengths, weaknesses, opportunities and challenges. Individual fair organizations may need to edit, revise, or add to these questions to make them relevant to their own circumstances.

#### Questions of staff members:

- What is your favorite thing about working for this organization? What is your least favorite?
- You've "just been named the CEO of this organization." What would you change and what would you keep the same?
- What are the opportunities and challenges facing this organization over the next year? Over the next five years?
- How does the role you play here support the organization's vision and goals?
- What does this organization do well? What could it improve that would be most meaningful to its customers or the community? What could it improve that would be most meaningful to you?
- How would you describe the working relationships between the CEO, board, and staff? What enables these relationships to function in an ideal or optimal way? What prevents that from happening?



### **Questions of board directors:**

- What motivates you to volunteer your time as a board member of this organization?
- When you first learned of your appointment, what did you expect serving on the board to entail? In what ways have those expectations been met, exceeded, or unrealized – for both the positive and negative?
- In the ideal future for this organization, what would be the same and what would be different from the way it operates or exists today?
- What are the opportunities and challenges facing this community over the next five years? How do you think they will affect the fair organization? How, if at all, will they affect the role of the board?
- What is the most important key to this organization's success? What would be the most likely cause of its downfall?
- How well does this board work together? How well does it work with the CEO and staff? What enables these relationships to function in an ideal or optimal way? What prevents that from happening?

### **Questions of community members:**

- What do the board and CEO need to know about the community's perception of the annual fair, the fairground, year-round activities at the fairgrounds, the staff and/or board?
- You've "just been named the new CEO of the fair organization." What would you change and what would you keep the same?
- What opportunities or challenges facing this community over the next five years should the fair organization be expecting to address? What is your advice to the fair board and CEO for how to go about addressing them?
- In the ideal future for this community, how would the fair organization's role be different or the same?
- In the ideal future for the fair, what would be the same and what would be different from the most recent fair?
- In the ideal future for the fairground, what would be the same and what would be different from the fairground as it exists today?

### **Developing questions**

If the sample questions provided above are not suitable for the purpose of your assessment, you may need to develop new questions. You may want to consider the following guidelines for developing good questions:

- Ask them of yourself: can you answer them? If not, they may be confusing, in which case, it's likely the interviewees won't be able to either.
- "Why" questions sometimes put people on the defensive. Instead, try asking what the purpose, cause, or underlying issue is of whatever you want them to examine.
- Be careful that your question doesn't tell them what their answer "should be." Everyone likes to be right and most people like to be helpful. If they think they know what the answer to your question is "supposed to be," they may answer accordingly, rather than genuinely. For example, "Isn't the fair great?" is almost guaranteed to get a confirming, positive response. Asking "What did you think about the fair this year?" will tell the interviewee you want his or her true opinion.
- Ask open-ended questions – questions that can't be answered easily with a single word answer like "yes" or "no."



### Responding to the interview findings

Once the fair organization has selected the interviewers, interviewees, and interview questions, you can turn the *interviewing* process over to the interviewers. Scheduling, conducting and analyzing the interviews are time-consuming processes. Expect a two person interviewer team to need four fully dedicated weeks to conduct and analyze 15 interviews.

***The Interviews Report*** If the interviewers use the Interviews Report template to prepare their findings, the organization can expect a report that provides unattributed ideas, quotations, and recommendations from the interviews, organized by common themes. It should identify important issues the interview findings suggest are facing the organization as well as the interviewers' recommendations for addressing them.

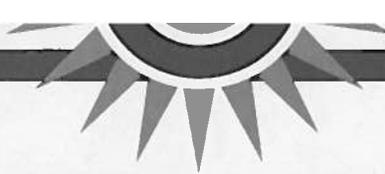
***The Interview Response*** Two Interviews Response worksheets are provided to lead the fair organization through a response process to the Interviews Report. These worksheets will help a fair organization identify and commit to short and long-term plans for action on the basis of the interview findings. They are intended for the board of directors, the CEO, and/or the staff to complete individually and collectively.

- The first worksheet, *Individual Response and Synthesis*, should be completed independently by members of the board, CEO, and/or individual fair staff members, depending on who will be involved in making decisions on the basis of the assessment findings.

This worksheet encourages individual leaders of the organization to make meaning from interview findings *before* making meaning of them as a group. Its primary purpose is to provide structure for personal reflection on the significance of the interview findings, not to document an organizational perspective or policy intention. For this reason, it is not intended to serve as a public document. Accordingly, it is indicated as an "Internal Working Document."

- The second worksheet, *Organizational Conclusions*, should be completed collectively by members of the fair organization who will set the course and monitor performance of the organization. It should represent the consensus of decision-makers regarding the most important issues raised through the assessment interview findings and short and long-term actions the organization will take to address those issues.

The reinvention project team recommends that, using completed *Individual Response and Synthesis* worksheets for reference, fair organizations complete this worksheet during a board retreat, with the assistance of a neutral facilitator. It can serve as a resource for development of a strategic plan, annual budget, or program planning and decision-making.



## GUIDELINES FOR INTERVIEWERS

The following guidelines are intended for an uninitiated assessment interviewer. They address considerations for scheduling assessment interviews, conducting them, and preparing a report on the findings.

### Scheduling the interviews

Interviewing is an exhausting process. Scheduling that allows sufficient time for rest and re-grouping between interviews will enhance the quality of your findings. Because the goal of an assessment interview is to explore and elicit interviewees' candid thoughts, feelings, opinions, and associations with a particular topic, allow between 45 to 90 minutes for each interview. You may also find it helpful to allow an additional 45 minutes to an hour *between* interviews to clarify your notes and prepare for the next interview.

When you schedule the interview explain the purpose of the interview so that the interviewee will begin thinking about the subject. Frequently, potential interviewees ask for the interview questions, but it is important to avoid giving assessment interviewees the questions ahead of time. The spontaneity of an interviewee's response in an assessment interview is more important to the process than a well-worded answer. If you explain this and assure the person that individual responses will not be attributed to interviewees in any public document, most potential interviewees will be satisfied to wait.

### On the issue of attribution

The discipline of organizational assessment requires gathering as much data as possible initially, and then methodically sorting out the meaningful from the less so. The reinvention project team found that when interviewees expected to have their identities protected, they were freer with opinions that they would otherwise have kept to themselves – good and bad, as well as informed and uninformed. In other words, it created more data.

Also, creating doubt about “who said what” when presenting interview findings seems to mitigate the natural tendency of readers to dismiss an important comment because its source would have seemed to lack credibility. In effect, every comment becomes one that must be accepted or dismissed upon its merits instead of its source. And, in fact, sometimes a person without the proper credentials will make a particularly astute comment about a topic that even an “expert” would miss simply as a result of over-familiarity with the subject matter.

### Conducting the interviews

The goal of the interviewer is to collect accurate and useful information. To do this successfully requires that the interviewer gain confidence of the interviewee as a neutral, trustworthy professional and as an effective and interested listener. It is also important that the interviewer take accurate and comprehensive notes. Simple guidelines to assist interviewers with these tasks are provided on the following pages.



***Gaining the interviewees' confidence:***

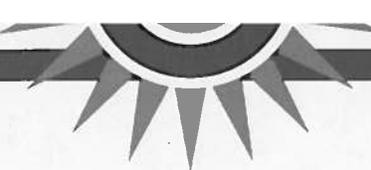
- Start and end the interview on time or slightly early.
- Thank the interviewee for his or her time and take the first few minutes to establish rapport through informal conversation.
- Explain the purpose of the interview and a little about your own background.
- Maintain a non-judgmental manner. Avoid conveying – either in word or manner – approval or disapproval of what the interviewee has to say. Some non-judgmental responses to the interviewee's comments may include:
  - “I see ...”
  - “That is [useful/helpful] information.”
  - Repeating the question gently (if the interviewee has begun to stray in a direction that isn't useful).
  - Repeating the response as you write it down.
- Listen attentively and respond to cues that the interviewee may want either to elaborate or change the subject.

***Taking accurate and comprehensive notes*** One way to ensure accurate and comprehensive interview notes is to record the interview with audiotape. The advantage of this method is plainly that it creates a verbatim record of what was said. The disadvantages include that in order to begin analyzing the interviews, the interviewer will have to listen to the interviews again to take notes or have the tapes of the interviews transcribed. Also, many interviewees are inclined to be less candid when they know they are being recorded (and you must let them know they are being recorded in order to use the information).

Regardless of whether the interviewer chooses to tape the interview, we recommend that the interviewer or interviewers also take written notes during the interview. Written notes help the interviewer recognize and respond to themes in the interviewee's responses immediately. When taping an interview, it is easy for an interviewer to rely on the audiotape to capture the interviewee's responses and pay less careful attention to the nuances in the interviewee's responses as they are being given. Taking written notes also helps the interviewer identify comments that require greater clarification while the interviewee is present.

Team interviews are another strategy for both ensuring the integrity of the interview notes and helping establish the interviewee's confidence that his or her responses are being adequately and correctly recorded. As noted above, the roles of scribe and interviewer can alternate in a team interview, ultimately increasing the likelihood that the written record of the interview will be more comprehensive.

If an interviewer chooses not to tape the interview, the most difficult aspect of note taking is deciding what to write down. Ideally, the interviewer has a shorthand method that enables speedy note taking. In any case, the interviewer should try to capture as much as possible and as close to verbatim as possible. A good way to hold the interviewee's attention while taking notes is to repeat his or her responses as you take them down.



### Preparing the interviews report

The Interviews Report template was designed to help you prepare the interview findings for a fair organization. It includes two worksheets through which to present an analysis of the interview comments (for which you will need to make multiple copies), as well as a recommended cover page and attachment form. A description of each of these elements follows.

***Interviewer's Synthesis*** Once you have documented all of the interviews you will be ready to conduct the first level of analysis to determine the meaning of the interview comments. The first worksheet, titled *Interviewer's Synthesis*, is designed to assist with this exercise. It asks you to identify the common themes that arose in the interviews and begin to categorize specific comments from each of the interviews into one or more of these themes. If you asked the same questions of all of the interviewees, this may be as simple as categorizing all of the responses to the same question as one theme.

If, however, you interviewed fair staff, fair board directors, and community members and had to use different questions for each, it may be that one of your questions for each group generated similar comments. Say, for example, you asked fair staff, "what is your favorite thing about working for the fair?" and asked board directors, "why did you seek an appointment to the fair board?" and asked community members, "you've just been named the new CEO of the fair – what would you change and what would you keep the same?" The responses might vary greatly, but you might find that all of their answers touch on the theme of what is important about the fair. Once you've identified a theme, check to see if any of the other questions also drew comments on it. Capture all of the comments relevant to a specific theme on one copy of the *Interviewer's Synthesis* worksheet.

To complete an *Interviewer's Synthesis* worksheet:

- Under "Theme," give a title to the theme; for example, to continue from above, you might enter "Importance of the fair."
- Under "Synopsis," describe in your own words the most commonly expressed sentiments or ideas on this theme, noting points of contradiction or consensus.
- Under "Specific Recommendations," list verbatim, though unattributed, recommendations from the interviews related to this theme.
- Under "Specific Comments and Observations," list verbatim – and again unattributed – comments or observations that were particularly revealing or significant on this theme, delineating the positive from the negative comments in the "Favorable" and "Not Favorable" columns.

Use one copy of this worksheet for every major theme that emerged from the interview process (note that the worksheet has a space for you to assign theme and page numbers once you have compiled more than one worksheet). If you used the same questions in every interview, use each question as a separate theme.

Don't worry about ascribing every note you took to a theme. Some will fall through the cracks as less relevant, redundant, or insignificant. Before you complete this exercise, however, carefully review all comments you have decided not to use in order to make certain they don't comprise a theme of their own.





**Interviewer's Conclusions** The second worksheet invites you to provide your own insights about the significance of what the interviewees had to say. After reviewing all of your *Interviewer's Synthesis* worksheets, you will probably find that you have ideas for what is most important for the fair organization either to recognize or respond to. You may find that there are some issues that the interviewees didn't actually identify specifically, but that after reviewing all of the responses from several interviewees these become evident to you.

Use this worksheet to identify and prioritize the most important of these issues for the organization, and your recommendations to the organization for addressing them.

To complete the *Interviewer's Conclusions* worksheet:

- Under "Issue," briefly describe one of the issues raised in the interviews that you consider important for the organization to recognize or address. For example, if one of your themes was "quality of grounds and facilities" and most of the interview comments on this theme were negative, "need for grounds improvement" may be an issue you think will need to be addressed. Give the most important issues higher priority by addressing them first (in other words, the most important issue should be the first issue).
- Under "Comments," explain what it is about this issue that has caused you to identify it as important. For example, explain here that you identified "need for grounds improvement" as an issue that arose in the interview because so many of the comments on the quality of the grounds and facilities were negative.
- Under "Recommendations," suggest 3-5 actions the fair organization may want to take to address this issue, using either the recommendations made by the interviewees or drawing upon your own conclusions based upon the interviewees' recommendations and comments.

**Bringing it all together** The cover page of the Interviews Report should list how many pages are included in the report all together and a table of contents that provides a list of the themes from the *Interviewer's Synthesis* worksheets, a list of issues from the *Interviewer's Conclusions*, and the page numbers of each. (Note that once you compile all of your worksheets, you will need to enumerate them consecutively.) The cover page should also provide the signatures of the interviewers and the date on which the report will be presented to the fair organization.

At the end of the *Interviewer's Conclusions* worksheets, attach the names of all of the interviewees, their affiliations, and the dates on which they were interviewed. While their comments may not be specifically attributed, it will be an important part of the organizational assessment to maintain a record of interviewees.



# INTERVIEWS REPORT

*From the assessment interviews conducted in:*

Month and year of interviews

INTERVIEW THEMES	PAGE NUMBER
Theme 1:	
Theme 2:	
Theme 3:	
Theme 4:	
Theme 5:	
Theme 6:	
Theme 7:	
RECOMMENDATIONS	PAGE NUMBER
Issue 1:	
Issue 2:	
Issue 3:	
Issue 4:	
Issue 5:	
LIST OF INTERVIEWEES	

Presented to:

\_\_\_\_\_  
Name of fair organization

Presented by:

\_\_\_\_\_  
Signature of the interviewer(s)

\_\_\_\_\_  
Date submitted to fair organization



**Interviewer's Synthesis Worksheet**

Page: \_\_\_\_\_

Note to Interviewer: Use one worksheet for each theme, and attach additional pages as needed (indicate theme and page number for each additional page).

**Theme:****Theme #:** \_\_\_\_\_

--

**General Synopsis:**

--

**Specific Recommendations:**

--

**Specific Comments & Observations:**

Favorable	Not Favorable



**Interviewer's Conclusions Worksheet**

**Page:** \_\_\_\_\_

Note to Interviewer: List the most important issues first. Use one copy of this worksheet for each issue, and attach additional pages as needed (indicate issue and page number for each additional page).

**Issue:**

**Issue #:** \_\_\_\_\_

**Comments:**

**Recommendations:**





**List of Interviewees**

**Page:** \_\_\_\_\_

Note to Interviewer: Sort list either alphabetically by name, or chronologically by date. Attach additional pages as needed.

Name	Affiliation	Date of Interview







**Interviewer's Response Worksheet**

Page: \_\_\_\_\_

**ORGANIZATIONAL CONCLUSIONS**

**Instructions:** Use this worksheet to document the consensus of the organization regarding its official responses to the *Interviews Report*. First, describe the issue the organization will address (may or may not correlate directly with the issues as listed in the *Interviews Report*). Second, explain the organization's position on this issue including factors in the formulation of the position (for example mission compatibility or resource availability), and explain why this issue is a priority concern. And last, identify both short- and long-term actions the organization will take to address the issue. Use one copy of this worksheet for each issue; attach and number additional pages as needed.

**Issue:****Issue #:** \_\_\_\_\_

--

**Position:**

--

**Short-term actions:** (Will be taken in the next six months to a year)

--

**Long-term actions:** (Will be taken in the next three to five years)

--





# FAIRTIME ASSESSMENT: ASSESSING THE FAIR EXPERIENCE FROM A CUSTOMER'S PERSPECTIVE

## OVERVIEW

The “Fairtime Assessment” tool allows fair management, staff, or the board of directors to gain objective assessment of the quality of their organization’s primary product: the experience of attending the fair.

Over the course of the reinvention project, numerous community stakeholders revealed highly personal attachments to the fair as the community’s annual gathering place. They valued the opportunity to meet once each year at the fair as occasion to celebrate the passage of time, renew friendships, and enjoy a family activity that offers “something for everyone.” Fair organizations have an enormous task in producing a fair event that supports this annual reunion within a comfortable and festive setting and with programs and attractions that appeal to a wide range of interests, tastes and ages. Ensuring that the fairtime environment showcases the community to its best advantage is involved and detail-oriented work.

Objective assessment of the fair experience is important to ensure that the fair organization is attending to the details that matter. It is not a task for the uninitiated. The details that matter are not always obvious to the typical customer who is generally more aware only of their overall effect. For this reason, it is often not enough to collect data from customers alone. But rarely does the fair management, staff, or board of directors have the time or perspective to assess the experience themselves.

### Who should use this tool

The “Fairtime Assessment” is primarily a tool intended to help fair organizations improve the product they deliver to their customers. It is a series of worksheets that leads an objective, but informed assessor through the major components of the fair experience, helping them to identify and note how well the organization has executed the details that matter. Collected regularly, the information it produces can be used by the assessed fair organization to benchmark the organization’s performance against prior years’ performance.

To use this tool to its best effect, an organization should choose assessors who are familiar with “behind-the-scene” fairtime operations and who will accept the responsibility of visiting the fair *as if* they were typical customers. To reduce the expense of the tool’s application, some fair organizations may want to make *quid pro quo* arrangements with neighboring fairs to conduct each other’s assessments.

The “Fairtime Assessments’ ” usefulness should not be considered limited to its explicit uses. This tool may better serve some organizations as a point of reference for their own form of fairtime assessment or as an internal “checklist” for fair management and staff as they prepare to open the gates to the public.

## INSTRUCTIONS FOR CONDUCTING A FAIRTIME ASSESSMENT

**Most important!** The assessor must pay to park and attend the fair as a typical customer, including not taking advantage of special privileges or services throughout the day.



### Worksheets and scoring

The “Fairtime Assessment” is comprised of seventeen worksheets. The first, the “Fairtime Assessment” cover page, is for the assessor to identify him or herself, note the date and time of his or her visits, indicate the final score and overall impression, and note the total number of pages of his or her assessment.

Each of the next fifteen worksheets (worksheets A-O) lists several aspects or details of a specific component of the fair experience. For example, some of the components explored are *the fair shopping experience*, *customer comforts and services*, and *community participation and pride*. Each component is additionally divided into relevant subcategories.

Subcategory	Abbreviation	Definition
Festivity	<u>FE</u>	Atmosphere of celebration and quality of fair aesthetics
Information	<u>IN</u>	Type and amount of information given to fair customers
Services	<u>SE</u>	Efforts and amenities to increase customer comfort and enjoyment of the fair
Participation	<u>PA</u>	Ways the community and guests can participate in fair programs
Learning	<u>LE</u>	Various ways in which the fair encourages learning
Operations	<u>OP</u>	Quality of fair operations

Unless otherwise indicated in the worksheet, the scoring scale for each aspect of a subcategory is 1 through 5, where 1 = “poor,” and 5 = “excellent.”

Two worksheets, *Recognition and Participation* (worksheet I) and *Special Events and Attractions* (worksheet O) address components of the fair for which one worksheet is likely to be insufficient. For example, worksheet “I,” which leads the assessor through a competitive exhibits area, is only designed to allow comment on one such area. However, it is not uncommon for a fair to have several competitive exhibits areas. Similarly, worksheet “O” only examines one special event or attraction at the fair. The assessor may want to make more than one copy of each of these worksheets. As indicated on these worksheets, the assessor will then average the scores of all his or her “I” and “O” worksheets as the final score for this component of the fair.

### Bonus Points

Each worksheet includes space for the assessor to note special innovations to the fair component being assessed, or some aspect of how the component is executed. Where appropriate give a brief description and rank by scale.

### Additional comments, questions, or recommendations

Each worksheet asks the assessor to make additional comments, raise questions, or make recommendations as warranted. Most of the worksheets have space indicated on the page for these purposes. Some worksheets, however, leave very little room for this additional and very valuable information. As necessary, please attach additional pages for these purposes in order to ensure that the assessed fair organization benefits fully from the assessment.





### ***Determining the final score***

For each worksheet A-O, total the subcategory points and total overall points. From each worksheet, transfer the “Total points,” “Bonus points for innovation,” and the scores of each subcategory (except, as noted above for worksheet I and worksheet O, where the assessor will transfer only the average scores from several worksheets) to the *Ratings Summary Sheet* (worksheet P).

On worksheet P, add each column together, record in the space indicated, and transfer each total column score to the appropriate boxes on the “Fairtime Assessment” cover page, in the “Ranking Report” table.

In worksheet P, the ranges for each subcategory are also given, and where the assessor notices a particularly low or high score, he or she may want to call special attention to it for the assessed organization. The space on the cover page identified as “Special note from the assessor” may be used as a place to state an overall impression of the fair or note any particular issue of importance in the assessment findings.

### **Photos**

Photo documentation is a valuable component of a fairtime assessment. Measuring the quality and consistency of individual programs and aspects of the fair is a considerable challenge once the event is up and running. Photographs will provide objective views of various aspects of the fair, which may then serve as a permanent record from which to base future operational and program development decisions. Attach photographs and additional comments on separate sheets; be sure to include these sheets in the final total of pages listed on the “Fairtime Assessment” cover page.



## FAIRTIME ASSESSMENT:

\_\_\_\_\_

(year)

\_\_\_\_\_

Fair Name

\_\_\_\_\_

Assessor's Name

\_\_\_\_\_

Fair Location

\_\_\_\_\_

Assessor's Affiliation

<b>VISIT 1</b>	Date:	_____	
	Time:	arrive: _____	depart: _____
	Weather:	a.m. _____ p.m. _____	
	Attendance:	a.m. _____ p.m. _____	
<b>VISIT 2</b>	Date:	_____	
	Time:	arrive: _____	depart: _____
	Weather:	a.m. _____ p.m. _____	
	Attendance:	a.m. _____ p.m. _____	

### RANKING REPORT

Transfer total scores as tallied on worksheet P, "RATINGS SUMMARY SHEET"		SCORING RANGE	MID-POINT SCORE
Total worksheet points		254 – 1305	780
Total bonus points		0 – 85	43
<b>TOTAL SCORE</b>			
Special note from the assessor:			
Total pages attached: <input style="width: 50px; height: 20px;" type="text"/>			

**WORKSHEET A  
GETTING TO THE FAIRGROUND AND THE FAIR:  
FIRST IMPRESSIONS**

<b>INFORMATION:</b> _____ points ↓	<b>Poor → Excellent</b>		<b>COMMENTS</b>
Billboards w/in 10 miles	No (=1)	Yes (=5)	(Fair name, dates, exit)
Fairground exit signs	No (=1)	Yes (=5)	(Cal Trans)
Promotional signs on adjacent thoroughfares	1	2 3 4 5	
Directional signs to gates, parking	1	2 3 4 5	
Perimeter signs: dates, attractions	1	2 3 4 5	
<b>SERVICES:</b> _____ points ↓			
Safe, easy access to parking	1	2 3 4 5	
Pole markers to locate vehicles	1	2 3 4 5	
Parking staff appearance, attitude	1	2 3 4 5	
Parking lot security presence	1	2 3 4 5	
Parking shuttles	No (=1)	Yes (=5)	
Passenger drop off points	1	2 3 4 5	
<b>OPERATIONS:</b> _____ points ↓			
Mass transit, off-site parking	No (=1)	Yes (=5)	
Traffic controls, if needed	No (=1)	Yes (=5)	
Parking lot lights	1	2 3 4 5	
Lined lot and/or parking guides	1	2 3 4 5	
Parking fees posted, readable	1	2 3 4 5	

**TOTAL SCORE FOR "GETTING TO THE FAIR" (IN+SE+OP) = \_\_\_\_\_** *transfer to worksheet P*

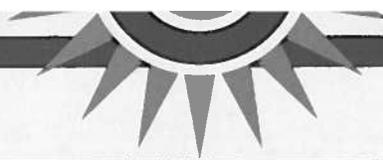
**BONUS POINTS: INNOVATIONS**

1	2	3	4	5
---	---	---	---	---

*transfer to worksheet P*

Explain:

NOTES, QUESTIONS AND RECOMMENDATIONS



**WORKSHEET B**  
**WELCOME TO THE FAIR: FIRST IMPRESSIONS**

<b>FESTIVITY:</b> _____ points ↓	<b>Poor → Excellent</b>	<b>COMMENTS</b>
Conveys image of fun and celebration (flags, flowers, etc.)	1 2 3 4 5	
Overall appearance: clean, well-kept, organized inside and out	1 2 3 4 5	
Perimeter fence appearance	1 2 3 4 5	
Perimeter landscaping	1 2 3 4 5	
Special features of main gate(s)	1 2 3 4 5	
<b>INFORMATION:</b> _____ points ↓		
Main gate(s) signs for fair: color, placement, quality, information	1 2 3 4 5	
Use of sponsor signs (primarily promote the fair — not products)	1 2 3 4 5	
<b>SERVICES:</b> _____ points ↓		
Shaded rest areas outside gates	1 2 3 4 5	
Feels safe and secure	1 2 3 4 5	
Services: will call, credit cards, etc.	1 2 3 4 5	
Professional appearance and welcoming attitude of all staff	1 2 3 4 5	
Efficient ticket sales	1 2 3 4 5	
Admission prices sign quality	1 2 3 4 5	
<b>OPERATIONS:</b> _____ points ↓		
Main gate(s) clean, fresh-looking	1 2 3 4 5	
Public telephones (working)	1 2 3 4 5	
Adequate # of ticket windows	1 2 3 4 5	
Ticket controls/ticket takers	1 2 3 4 5	
<b>TOTAL SCORE FOR "WELCOME TO THE FAIR" (FE+IN+SE+OP) = _____</b> <i>transfer to worksheet P</i>		
<b>BONUS POINTS: INNOVATIONS</b>	1 2 3 4 5	<i>transfer to worksheet P</i>
Explain:		
NOTES, QUESTIONS AND RECOMMENDATIONS		

**WORKSHEET C**  
**INFORMING CUSTOMERS: WHAT'S FUN AT THE FAIR?**

INFORMATION: _____ points ↓	Poor → Excellent	COMMENTS
Programs at gates	1 2 3 4 5	Handed out (5 pts)
Simple, clean layout and typeface	1 2 3 4 5	
Program schedule and highlights	1 2 3 4 5	
Map in program schedule	1 2 3 4 5	
Emergency services = map/text	1 2 3 4 5	
Easy to find times and places	1 2 3 4 5	
SERVICES: _____ points ↓		
Discount days and deals	1 2 3 4 5	
Participation interest form	No (=1)   Yes (=5)	
Emergency and disaster procedures	1 2 3 4 5	
Mass transit, off-site parking: shuttle hours, meeting points	1 2 3 4 5	

**TOTAL SCORE FOR "INFORMING CUSTOMERS" (IN + SE) = \_\_\_\_\_** *transfer to worksheet P*

**BONUS POINTS: INNOVATIONS** 1 2 3 4 5 *transfer to worksheet P*

Explain:

NOTES, QUESTIONS AND RECOMMENDATIONS



### WORKSHEET D CUSTOMER COMFORTS AND SERVICES

INFORMATION: _____ points ↓	Poor → Excellent	COMMENTS
Large grounds maps at gates	1 2 3 4 5	
Public address system	1 2 3 4 5	
Directional signs on grounds	1 2 3 4 5	
<b>LOCATER SIGNS</b>		
Lost kids, security, first aid station	1 2 3 4 5	
Restrooms, telephones, etc.	1 2 3 4 5	
Exhibit programs and buildings	1 2 3 4 5	
Shopping areas/buildings	1 2 3 4 5	
Features and attractions	1 2 3 4 5	
Stages	1 2 3 4 5	
Fair office, hours, telephone #	1 2 3 4 5	(sign: alternative location for assistance)
<b>SERVICES: _____ points ↓</b>		
Information booths at gates	1 2 3 4 5	
Centralized emergency services	1 2 3 4 5	
Traditional meeting spots	1 2 3 4 5	
Shaded seating throughout fair	1 2 3 4 5	
<b>OPERATIONS: _____ points ↓</b>		
Clean, equipped restrooms	1 2 3 4 5	
Immaculate fairgrounds	1 2 3 4 5	
Water fountains, # and quality	1 2 3 4 5	<i>A basic human need!</i>
Minimal presence of vehicles	1 2 3 4 5	
Public telephones w/ 911 access	1 2 3 4 5	
<b>TOTAL SCORE FOR "CUSTOMER COMFORTS AND SERVICES" (IN+SE+OP) = _____</b> <span style="float: right;"><i>transfer to worksheet P</i></span>		
<b>BONUS POINTS: INNOVATIONS</b>	1 2 3 4 5	<i>transfer to worksheet P</i>
Explain:		
NOTES, QUESTIONS AND RECOMMENDATIONS		

**WORKSHEET E  
FESTIVITY AND AESTHETICS:  
A COMMUNITY CELEBRATION PLACE**

<b>FESTIVITY:</b> _____ points ↓	<b>Poor → Excellent</b>	<b>COMMENTS</b>
Lawn (quality, quantity)	1 2 3 4 5	
Flowers “ “	1 2 3 4 5	
Shrubs “ “	1 2 3 4 5	
Trees “ “	1 2 3 4 5	
Container plantings “ “	1 2 3 4 5	
Flags, banners	1 2 3 4 5	
Coordinated sign program	1 2 3 4 5	
Theme areas and props	1 2 3 4 5	
Temporary or permanent art	1 2 3 4 5	
<b>OPERATIONS:</b> _____ points ↓		
Buildings (condition, quality)	1 2 3 4 5	
Building entryways “ “	1 2 3 4 5	
Tents “ “	1 2 3 4 5	
Grandstand (condition, capacity)	1 2 3 4 5	
Paving (condition, quantity)	1 2 3 4 5	
Lighting	1 2 3 4 5	
Layout and use of grounds	1 2 3 4 5	
Traffic flow	1 2 3 4 5	
Vehicle traffic: golf carts	1 2 3 4 5	
<b>TOTAL SCORE FOR “FESTIVITIES AND AESTHETICS” (FE+OP) = _____</b> <i>transfer to worksheet P</i>		
<b>BONUS POINTS: INNOVATIONS</b>	1 2 3 4 5	<i>transfer to worksheet P</i>

Explain:

NOTES, QUESTIONS AND RECOMMENDATIONS



**Worksheet F**  
**COMMUNITY PARTICIPATION AND PRIDE**

**PARTICIPATION:** \_\_\_\_\_ points ↓      circle all that apply      *Recommended quality elements to look for when ranking*

Community & Fair Partnerships:

1 point per role: Sponsors, Volunteers, Exhibitors, Fundraising, Coordinators; Possible points for each line = 0-5

Education	<u>S</u> <u>V</u> <u>E</u> <u>F</u> <u>C</u>	School-sponsored exhibits, awards programs, community outreach
Nonprofit organizations	<u>S</u> <u>V</u> <u>E</u> <u>F</u> <u>C</u>	Promote awareness of services and opportunities
Service clubs	<u>S</u> <u>V</u> <u>E</u> <u>F</u> <u>C</u>	Fundraising, membership development, community outreach
Government	<u>S</u> <u>V</u> <u>E</u> <u>F</u> <u>C</u>	Promote civic awareness and services and opportunities
Community service	<u>S</u> <u>V</u> <u>E</u> <u>F</u> <u>C</u>	Public health and safety awareness and services
Business (ag, banking, retail, etc.)	<u>S</u> <u>V</u> <u>E</u> <u>F</u> <u>C</u>	Demonstrate community support, promotion of goods and services
Recreation	<u>S</u> <u>V</u> <u>E</u> <u>F</u> <u>C</u>	Promotes public recreation services and resources
	<b>Poor → Excellent</b>	
Youth participation and recognition	1 2 3 4 5	Diverse programs and opportunities for schools, clubs, individuals in contests, projects, programs, classes, volunteers at the fair
Junior Fair Board	1 2 3 4 5	Encourages youth leadership, ownership, and opinion-makers
Youth talent (school, studio, and individual)	1 2 3 4 5	Music, theatre, dance, visual arts, academics, sports
Other:	1 2 3 4 5	Neighborhood associations, cultural, social, and arts organizations

**LEARNING:** \_\_\_\_\_ points ↓

Local history and roots	1 2 3 4 5	Artifacts, props, murals, theme, performances
Local culture showcase	1 2 3 4 5	Exhibits, displays, murals, theme, performances
Local economy showcase (ag, other)	1 2 3 4 5	Primary economic base – builds awareness
Contests and special days	1 2 3 4 5	Participants include partner representatives and others
Local treasures	1 2 3 4 5	Celebrate local achievement and talent

**TOTAL SCORE FOR "COMMUNITY PARTICIPATION & PRIDE" (PA+LE) = \_\_\_\_\_** *transfer to worksheet P*

**BONUS POINTS: INNOVATIONS**

1 2 3 4 5

*transfer to worksheet P*

Explain:

NOTES, QUESTIONS AND RECOMMENDATIONS

**WORKSHEET G  
THE FAIR SHOPPING EXPERIENCE**

<b>FESTIVITY:</b> _____ points ↓	Poor → Excellent	COMMENTS
Shopping areas décor and quality	1 2 3 4 5	
Separate product areas (spas, etc.)	1 2 3 4 5	
Vendor booth quality overall	1 2 3 4 5	
Special features (music, food, etc.)	1 2 3 4 5	
Professional fair vendors quality	1 2 3 4 5	Approx. %
<b>SERVICES:</b> _____ points ↓		(5=jubliant but not oppressive)
Noise level	1 2 3 4 5	
Building security and supervisors	1 2 3 4 5	
<b>PARTICIPATION:</b> _____ points ↓		
Local products/services	1 2 3 4 5	Approx. %
Customers: a.m./p.m.	1 2 3 4 5	(light, moderate, heavy)
<b>OPERATIONS:</b> _____ points ↓		
Building(s) layout	1 2 3 4 5	
Building cleanliness	1 2 3 4 5	(Equipment, supplies, etc.)
Vendor housekeeping	1 2 3 4 5	(Equipment, supplies, etc.)
Clean and equipped bathrooms	1 2 3 4 5	
Light levels: buildings	1 2 3 4 5	
Light levels: outdoor	1 2 3 4 5	
Water fountains, clean, working	1 2 3 4 5	

**TOTAL SCORE FOR "FAIR SHOPPING EXPERIENCE" (FE+SE+PA+OP) = \_\_\_\_\_**  
*transfer to worksheet P*

**BONUS POINTS: INNOVATIONS**      1 2 3 4 5      *transfer to worksheet P*

Explain:

NOTES, QUESTIONS AND RECOMMENDATIONS



## WORKSHEET H THE FAIR FOOD EXPERIENCE

SERVICES: _____ points ↓	Poor → Excellent	COMMENTS
Overall quality of choices	1 2 3 4 5	
Overall variety of choices	1 2 3 4 5	
Quiet places to eat a meal	1 2 3 4 5	
Food options near stages	1 2 3 4 5	
Professional concessions quality	1 2 3 4 5	% _____
<b>PARTICIPATION: _____ points ↓</b>		
Local food vendors	1 2 3 4 5	% _____
Regional specialties	1 2 3 4 5	
Picnic area/grounds	1 2 3 4 5	
Shaded table seating	1 2 3 4 5	
<b>OPERATIONS: _____ points ↓</b>		
Clean, maintained eating areas	1 2 3 4 5	
Clean, shaded eating spots	1 2 3 4 5	
Number of trash cans	1 2 3 4 5	
Condition of trash cans	1 2 3 4 5	
Restrooms adjacent to food areas	1 2 3 4 5	
Alcohol management program	1 2 3 4 5	
<b>TOTAL SCORE FOR "FAIR FOOD EXPERIENCE" (SE+PA+OP) = _____</b> <i>transfer to worksheet P</i>		
<b>BONUS POINTS: INNOVATIONS</b>	1 2 3 4 5	<i>transfer to worksheet P</i>

Explain:

NOTES, QUESTIONS AND RECOMMENDATIONS

List major eating/food vendor areas:

**WORKSHEET I**

**RECOGNITION & PARTICIPATION: COMPETITIVE EXHIBITS**

Fairs have many ways of displaying different kinds of competitive exhibits: Junior or Open; Agriculture, Fine Arts, 4-H, FFA, Industrial Technology, Home Arts, Woodworking, Gems & Minerals, Hobbies, Floriculture, Wine. For each exhibit area, use a separate copy of this worksheet; average the scores from all sheets into one set of scores.

LOCATION OF EXHIBIT AREA:		TYPE OF EXHIBITS:				
FESTIVITY: _____ points ↓	Poor → Excellent					COMMENTS
Creative entryway (sets the stage)	1	2	3	4	5	
Building and promotional signs	1	2	3	4	5	
Overall exhibit design quality	1	2	3	4	5	
Props and theme décor	1	2	3	4	5	
Special features (music or other festive sounds)	1	2	3	4	5	
Special displays (cite all)	1	2	3	4	5	
INFORMATION: _____ points ↓						
Exhibit signs and information	1	2	3	4	5	
Entry tags, readable names	1	2	3	4	5	
Building docents/staff	1	2	3	4	5	
Sign-up sheets for exhibiting next year	1	2	3	4	5	
PARTICIPATION: _____ points ↓						
New and innovative categories	1	2	3	4	5	
Professional and amateur	1	2	3	4	5	
Quantity and diversity of entries	1	2	3	4	5	(given local pop.)
Quality, consistency of display	1	2	3	4	5	
Public judging (people's choice)	1	2	3	4	5	Describe:
On-site contests open to public	1	2	3	4	5	Describe:
Clubs, organizations, agencies, and businesses as exhibitors and/or demonstrators	1	2	3	4	5	Describe:
Competition and awards sponsors	1	2	3	4	5	
Attendance: a.m./p.m.	1	2	3	4	5	
LEARNING: _____ points ↓						
Hands-on learning opportunities	1	2	3	4	5	(≠, variety) Describe:
Technique and skill demonstrations	1	2	3	4	5	(≠, variety) Describe:
Classes (demo stage)	1	2	3	4	5	Describe:
Judging sessions open to public	1	2	3	4	5	
OPERATIONS: _____ points ↓						
Exhibit display equipment quality	1	2	3	4	5	
Housekeeping and cleanliness	1	2	3	4	5	
Building and exhibit lighting	1	2	3	4	5	
Layout and traffic flow	1	2	3	4	5	

**TOTAL SCORE FOR "RECOGNITION & PARTICIPATION" (FE+IN+PA+LE+OP) = \_\_\_\_\_ (for this worksheet)**  
 Total (FE+IN+PA+LE+OP) for all completed worksheets = \_\_\_\_\_; divided by ≠ of completed worksheets \_\_\_\_\_ transfer to worksheet P

**BONUS POINTS: INNOVATIONS**      1   2   3   4   5      transfer to worksheet P

Explain:

NOTES, QUESTIONS AND RECOMMENDATIONS

## WORKSHEET J

### PERFORMING ARTS ON STAGE

Grandstand and grounds stages

Circle # ranking in column 1 = poor, 5 = excellent; take average	STAGE 1:	STAGE 2:	STAGE 3:
<b>FESTIVITY:</b> _____ points (S1+S2+S3÷3) ↓	S1 points:	S2 points:	S3 points
Setting and ambiance	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5
Creative stage backdrop or other décor	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5
Overall stage image and quality	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5
<b>INFORMATION:</b> _____ points (S1+S2+S3÷3) ↓	S1 points:	S2 points:	S3 points
Performance schedule sign	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5
Sponsor banner	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5
Showtimes per fair and sign schedule	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5
<b>SERVICES:</b> _____ points (S1+S2+S3÷3) ↓	S1 points:	S2 points:	S3 points
Sound levels	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5
Shade/rain cover for audience	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5
Access to food and drink	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5
Seating quality (benches, bleachers, etc.)	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5
Seating capacity	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5
Performing arts diversity	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5
Performing arts quality	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5
Show attendance: a.m./p.m.	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5
<b>OPERATIONS:</b> _____ points (S1+S2+S3÷3) ↓	S1 points:	S2 points:	S3 points
Technical stage assistance	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5
Show lighting	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5
Shound quality	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5
Shade/rain cover for acts	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5
Audience sightlines	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5
Cleanliness of stage and seating area	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5
<b>TOTAL SCORE FOR "PERFORMING ARTS ON STAGE" (IN+SE+OP) = _____</b> <i>transfer to worksheet P</i>			
BONUS POINTS: INNOVATIONS <i>transfer to worksheet P</i>	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5

Explain:

NOTES, QUESTIONS AND RECOMMENDATIONS

**WORKSHEET K  
PERFORMING ARTS: STROLLING**

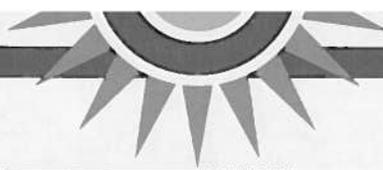
<b>FESTIVITY:</b> _____ points ↓	<b>Poor → Excellent</b>	<b>COMMENTS</b>
Variety of performing artists	1 2 3 4 5	
Quality of performing artists	1 2 3 4 5	
Frequency of performances	1 2 3 4 5	
Uniqueness of performers	1 2 3 4 5	
Makes full use of grounds	1 2 3 4 5	
Presence at main gates	1 2 3 4 5	
Performers add to festive feeling	1 2 3 4 5	
<b>INFORMATION:</b> _____ points ↓		
Performers listed in schedule	1 2 3 4 5	
Grounds stages noted on map	1 2 3 4 5	
<b>PARTICIPATION:</b> _____ points ↓		
Fair customers response	1 2 3 4 5	
Encourages participation	1 2 3 4 5	
<b>TOTAL SCORE FOR "PERFORMING ARTS: STROLLING" (FE+IN+PA) = _____</b> <i>transfer to worksheet P</i>		
<b>BONUS POINTS: INNOVATIONS</b>	1 2 3 4 5	<i>transfer to worksheet P</i>

Explain:

TYPES OF PERFORMANCES FEATURED: (check all that apply)

\_\_\_MAGIC \_\_\_CIRCUS ARTS \_\_\_COSTUMED CHARACTERS \_\_\_PUPPETS \_\_\_MUSIC  
\_\_\_OTHER \_\_\_\_\_

NOTES, QUESTIONS AND RECOMMENDATIONS



## WORKSHEET L FAMILY FUN AND MEMORY-MAKING

SERVICES: _____ points ↓	Poor → Excellent	COMMENTS
Fair is clean and feels safe	1 2 3 4 5	
Family value pricing specials	1 2 3 4 5	
Special attractions and features	1 2 3 4 5	
Performing arts, family appeal	1 2 3 4 5	
Fenced, separate kiddie carnival	1 2 3 4 5	
Quality of carnival staff	1 2 3 4 5	
Shade and seating in carnival	1 2 3 4 5	
Quiet shady grass areas	1 2 3 4 5	
Picnic area	1 2 3 4 5	
<b>PARTICIPATION: _____ points ↓</b>		
Fun contests for kids and families	1 2 3 4 5	
Learning and doing opportunities	1 2 3 4 5	
Participatory play areas	1 2 3 4 5	
Hands-on arts and crafts area	1 2 3 4 5	
Petting zoo	1 2 3 4 5	
<b>OPERATIONS: _____ points ↓</b>		
Water fountains (working/clean)	1 2 3 4 5	
Diaper changing stations in restrooms, clean and separate	1 2 3 4 5	
Centrally located first aid, lost kids area, security	1 2 3 4 5	
Stroller/wheelchair rental	1 2 3 4 5	
Alcohol management	1 2 3 4 5	
On grounds shuttle	1 2 3 4 5	
<b>TOTAL SCORE FOR "FAMILY FUN ..." (SE+PA+OP) = _____</b>		<i>transfer to worksheet P</i>
<b>BONUS POINTS: INNOVATIONS</b>	1 2 3 4 5	<i>transfer to worksheet P</i>

Explain:

NOTES, QUESTIONS AND RECOMMENDATIONS

**WORKSHEET M  
CARNIVAL MIDWAY**

# rides \_\_\_\_\_ # games \_\_\_\_\_ # concessions \_\_\_\_\_

<b>FESTIVITY:</b> _____ points ↓	Poor → Excellent	COMMENTS
Setting and ambiance	1 2 3 4 5	
Carnival placement and access	1 2 3 4 5	
Presentation quality	1 2 3 4 5	[trailers and trucks out of view]
Cleanliness, maintenance	1 2 3 4 5	
Benches, shade, comfort	1 2 3 4 5	
Rides condition, variety	1 2 3 4 5	
Games condition, variety	1 2 3 4 5	
Concessions variety, quality	1 2 3 4 5	
Special features [cite all]	1 2 3 4 5	
Attendance	1 2 3 4 5	(time, weather)
Staff appearance	1 2 3 4 5	
<b>SERVICES:</b> _____ points ↓		
Staff attitudes and service	1 2 3 4 5	
Guest services booth	1 2 3 4 5	
Value pricing	1 2 3 4 5	
<b>OPERATIONS:</b> _____ points ↓		
Layout and traffic flow	1 2 3 4 5	
Ticket booths, # and access	1 2 3 4 5	
Barriers to junction boxes	1 2 3 4 5	
Cable mats	1 2 3 4 5	
Rider responsibility signs	1 2 3 4 5	
<b>TOTAL SCORE FOR "CARNIVAL" (FE+SE+OP) = _____</b>		<i>transfer to worksheet P</i>
<b>BONUS POINTS: INNOVATIONS</b>	1 2 3 4 5	<i>transfer to worksheet P</i>

Explain:

NOTES, QUESTIONS AND RECOMMENDATIONS



## WORKSHEET N AGRICULTURAL EDUCATION: LIVESTOCK

FESTIVITY: _____ points ↓	Poor → Excellent	COMMENTS
Barn(s): presentation and image	1 2 3 4 5	
Barn(s): flags, banners	1 2 3 4 5	
Barn(s): landscaping, flowers, etc.	1 2 3 4 5	
Barn(s): special exhibits, displays	1 2 3 4 5	
<b>INFORMATION: _____ points ↓</b>		
Barn(s) and exhibit area signs	1 2 3 4 5	
Directional and explanatory signs for special exhibits and displays	1 2 3 4 5	
Explanatory signs re: breeds and livestock exhibiting process and rules	1 2 3 4 5	
<b>PARTICIPATION: _____ points ↓</b>		
“Real-time” contests (on-site sheep shearing, milking, and so on)	1 2 3 4 5	(# and type)
Level of exhibitor activity	1 2 3 4 5	
4-H concessions stand	1 2 3 4 5	
Auction (if observed)	1 2 3 4 5	
<b>LEARNING: _____ points ↓</b>		
Ag industry educational exhibits	1 2 3 4 5	(commodity boards, market and food production issues)
Barn tours, other “insider” exposure	1 2 3 4 5	
Interactive ag educational exhibits for general public	1 2 3 4 5	(# and type)
Judging: commentary and explanations to public	1 2 3 4 5	
Non-livestock ag literacy projects, K-12	1 2 3 4 5	(# of entries on display: S-M-L)
Birth area (cow, pig, etc.)	1 2 3 4 5	
<b>OPERATIONS: _____ points ↓</b>		
Barn area cleanliness, maintenance	1 2 3 4 5	
Condition of equipment: pens, cages	1 2 3 4 5	
Public safety	1 2 3 4 5	(consider barn layout, informational signage)
Exhibitor area housekeeping	1 2 3 4 5	

**TOTAL SCORE FOR “AGRICULTURAL EDUCATION: LIVESTOCK” (FE+IN+PA+LE+OP) = \_\_\_\_\_** *transfer to worksheet P*

**BONUS POINTS: INNOVATION** 1 2 3 4 5 *transfer to worksheet P*

Explain:

NOTES, QUESTIONS AND RECOMMENDATIONS



**WORKSHEET O**

**SPECIAL EVENTS & ATTRACTIONS: NICHE MARKETING**

Special events and attractions vary widely from fair to fair – in accordance with local interest and availability. Some examples include: demolition derbies, NASCAR races, satellite wagering, rodeos, petting zoos, animal rides, interactive science exhibits, working farms, wine-tasting, and/or open air theater. For each special event or attraction assessed, use a separate worksheet; average the scores from all sheets into one set.

**NAME OF SPECIAL EVENT OR ATTRACTION:**

<b>FESTIVITY:</b> _____ points ↓	<b>Poor → Excellent</b>	<b>COMMENTS</b>
Setting and ambiance	1 2 3 4 5	
Presentation	1 2 3 4 5	
<b>INFORMATION:</b> _____ points ↓		
Schedule and description of attraction or event: accuracy and availability	1 2 3 4 5	
Sponsor banners	1 2 3 4 5	
Explanatory signage of event or attraction: cost of admission, where to buy tickets (if relevant)	1 2 3 4 5	
<b>SERVICES:</b> _____ points ↓		
Sound levels	1 2 3 4 5	
Shade/rain cover for audience	1 2 3 4 5	
Access to food and drink	1 2 3 4 5	
Seating quality (benches, bleachers, etc.)	1 2 3 4 5	
Seating capacity	1 2 3 4 5	
<b>PARTICIPATION:</b> _____ points ↓		
Opportunities for hands-on interaction	1 2 3 4 5	
Event attendance	1 2 3 4 5	
<b>OPERATIONS:</b> _____ points ↓		
Technical assistance availability	1 2 3 4 5	
Stage, sound, and lighting quality	1 2 3 4 5	
Audience sightlines	1 2 3 4 5	
Cleanliness of seating area	1 2 3 4 5	

**TOTAL SCORE FOR "EVENTS & ATTRACTIONS:" (FE+IN+SE+PA+OP) = \_\_\_\_\_ (this worksheet)**

**TOTAL (FE+IN+SE+PA+OP) for all completed worksheets = \_\_\_\_\_; divided by # of completed worksheets = \_\_\_\_\_**  
*transfer to worksheet P*

**BONUS POINTS: INNOVATION**      1 2 3 4 5      *transfer to worksheet P*

Explain:

NOTES, QUESTIONS AND RECOMMENDATIONS

## WORKSHEET P RATINGS SUMMARY SHEET

INSTRUCTIONS: Please transfer the "Total points," "Bonus points for innovation," and the aggregate scores of each subcategory from each separate sheet to the spaces indicated below. Add each column together, record in the space indicated, and transfer each total column score to the appropriate boxes in the "RANKING REPORT" on the front page.

WORKSHEET	TOTAL POINTS		TOTAL SUBCATEGORY SCORES					
	RATINGS	BONUS	FE	IN	SE	PA	LE	OP
A. Getting to the fairground and the fair								
B. Welcome to the fair								
C. Informing customers								
D. Customer comforts and service								
E. Festivity and aesthetics								
F. Community participation and pride								
G. The fair shopping experience								
H. The fair food experience								
I. Recognition and participation								
J. Performing arts on stage								
K. Performing arts: strolling								
L. Family fun and memory-making								
M. Carnival midway								
N. Agricultural education: livestock								
O. Special events and attractions								
<b>TOTAL CATEGORY POINTS</b> ADD Ratings from worksheets A-O	↓	↓	FESTIVITY ↕	INFORMATION ↕	SERVICE ↕	PARTICIPATION ↕	LEARNING ↕	OPERATIONS ↕
TOTAL BONUS POINTS [0 - 85 possible points] ADD Bonus points from worksheets A-O								
Total subcategory points (FE+IN+SE+PA+LE+OP should equal total points)								
<b>SCORING RANGE (No bonus points added)</b> 254 = <u>Lowest ranking</u> if all identified areas are given at least ONE point. 780 = <u>Mid-range ranking</u> if all identified areas are rated. 1305 = <u>Highest possible ranking</u> if all identified areas are given FIVE points.			Range 52-260	Range 38-190	Range 52-260	Range 32-195	Range 15-75	Range 65-325

# FINANCIAL REPORTING STANDARDS FOR BOARD PACKAGES

## OVERVIEW

Various studies, including the Voss report, have identified a broad range of characteristics common to successful fairs. Lists of success characteristics invariably include having boards of directors who are knowledgeable about the fair's financial condition. Much of the reinvention project team's early focus was to produce this result as well as to standardize industry wide financial data to facilitate fair-by-fair comparisons and trend monitoring.

Observing that fairs will be unable to create community value unless they can create economic value, the reinvention project findings encourage fair organizations to understand the relationship between "value creation" and cash flow. Lewis Ridgeway, an accounting and financial management consultant, developed "Financial Reporting Standards for Board Packages."

## THE STANDARDS

- The monthly board package of financial information should include the following:
  - *Necessary*
    - Income and expense statement by current month, current year-to-date, budget year-to-date, remaining budget or variance [favorable or (unfavorable)], prior year-to-date, and current year budget
    - Balance sheet
  - *Desirable*
    - Cash flow projection for next six months
  - *Useful if having cash flow problems*
    - Statement of changes in net resources operations (reserves analysis)
    - Monthly payroll projections
  
- The trial balance, printout of the checkbook register, and detailed itemization of the accounts payable and accounts receivable ledgers are extraneous and distracting from the most important business of the board. These documents should not be included in the monthly board package. They warrant only occasional review by a financial or executive committee of the board, if at all.

### The monthly report

The following monthly Financial Report template to a board of directors includes all of the spreadsheets indicated as either necessary, desirable, or "useful if having cash flow problems." Individual fair organizations may find it necessary to customize these templates in order to ensure their greatest usefulness. Each template is also available upon request in Microsoft Excel 5.0 format. To request a diskette, please refer to the order form at the back of this book.



# FINANCIAL REPORT TO THE

Name of fair organization

## BOARD OF DIRECTORS

**For the month of:**

\_\_\_\_\_

Month and year

**Submitted by:**

\_\_\_\_\_

Signature of chief executive officer

*Place a checkmark in the appropriate boxes indicating spreadsheets included with this month's report.*

Spreadsheets:	Included:
Income and expense statement	<input type="checkbox"/>
Balance sheet	<input type="checkbox"/>
Six month cash flow projection	<input type="checkbox"/>
Statement of changes in net resources operations	<input type="checkbox"/>
Monthly payroll projections	<input type="checkbox"/>



# INCOME AND EXPENSE STATEMENT

Accounting Period:	Current month:	Current year-to-date:	Budget:	Remaining budget:	% budget used:	Prior year-to-date:
<b>REVENUES</b>						
Admissions						
Commercial space						
Concessions						
Exhibits						
Attractions fairtime						
Miscellaneous fair						
Horse racing						
Other 1:						
Other 2:						
Interim rentals						
<b>Total revenues</b>						
<b>EXPENSES</b>						
Administration						
Maintenance and operations						
Publicity						
Attendance operations						
Miscellaneous fair						
Premiums						
Exhibits						
Attractions (fairtime)						
Horse racing						
Other 1:						
Other 2:						
Equipment funded by fair						
Prior Year Adjustments						
<b>Total expenses</b>						
<b>OPERATING PROFIT or (LOSS)</b>						
<b>State Resources</b>						
Allocation						
State-funded project reserves						
<b>ADJUSTED PROFIT or (LOSS) (after state resources)</b>						
<b>Operating resources at beginning of year:</b> _____						



## BALANCE SHEET

Date: \_\_\_\_\_

ASSETS	This period	Last period
<b>Current Assets</b>		
Cash (all accounts)		
Accounts receivable		
<b>Total current assets</b>		
Land, buildings and equipment		
<b>TOTAL ASSETS</b>		
<b>LIABILITIES &amp; RESERVES</b>		
<b>Current Liabilities</b>		
Accounts payable		
Other liabilities		
Deposits received (deferred revenue)		
<b>Total current liabilities</b>		
<b>Noncurrent liabilities</b>		
Accrued compensated absences <sup>1</sup>		
<b>Reserves</b>		
<b>Restricted</b>		
Invested in fixed assets		
Reserve for Jr. livestock auction		
Reserve for specially designed projects		
<b>Unrestricted</b>		
Net resources operations		
<b>Total reserves</b>		
<b>TOTAL LIABILITIES AND RESERVES</b>		

<sup>1</sup> Some fair organizations may be carrying forward as a deferred charge, or noncurrent asset, the unexpensed portion of accrued compensated absences. Fairs & Expositions has recommended that this accrual be entirely expensed by the year 2000. The Audit Office of the Department of Food and Agriculture has prepared a memorandum outlining the procedures and journal entries necessary to achieve expensing of this accrual by the year 2000.

# CASH FLOW PROJECTIONS

Accounting Period:	Month 1	Month 2	Month 3	Month 4	Month 5	Month 6	6 Mnths TOTAL
<b>PROJECTED CASH RECEIPTS</b>							
State allocation							
Admissions							
Commercial space							
Concessions							
Exhibits							
Attractions fairtime							
Horse racing (satellite)							
Other 1:							
Other 2:							
Interim rentals							
<b>Total projected cash receipts</b>							
<b>CASH DISBURSEMENTS</b>							
Administration							
Maintenance & Operations							
Publicity							
Attendance operations							
Miscellaneous fair							
Premiums							
Exhibits							
Attractions (fairtime)							
Horse racing (satellite)							
Other 1:							
Other 2:							
Equipment funded by fair							
<b>Total projected cash outflow</b>							
<b>Increase (decrease) in cash</b>							
<b>Beginning cash balance</b>							
<b>Projected month end cash balance</b>							

## STATEMENT OF CHANGES IN NET RESOURCES OPERATIONS

Accounting Period:	Current period	Prior period	Net change
<b>Current Assets</b>			
Cash (all accounts)			
Accounts receivable			
<b>TOTAL CURRENT ASSETS</b>			
<b>Current Liabilities</b>			
Accounts payable			
Other liabilities			
Deposits received			
<b>TOTAL CURRENT LIABILITIES</b>			
<b>Working capital before prior claims</b>			
<b>Deduct prior claims on cash:</b>			
Reserve for Jr. livestock auction			
Reserve for Capital outlay projects			
<b>NET RESOURCES OPERATIONS</b>			

**MONTHLY PAYROLL PROJECTIONS**

Accounting Period:	JAN.	FEB.	MAR.	APR.	MAY	JUNE	JULY	AUG.	SEPT.	OCT.	NOV.	DEC.	TOTAL
<b>ADMINISTRATION</b>													
Name:													
Name:													
Name:													
Name:													
Name:													
Name:													
"Part-time" x "x hrs" @ "\$y"													
Administration subtotal													
<b>MAINTENANCE</b>													
Name:													
Name:													
Name:													
Name:													
Name:													
"Part-time" x "x hrs" @ "\$y"													
Maintenance subtotal													
<b>OTHER SIGNIFICANT FUNCTIONS</b>													
Name:													
Name:													
Name:													
Name:													
Name:													
Name:													
Name:													
Other function subtotal													



**MONTHLY PAYROLL PROJECTIONS**

Accounting Period:	JAN.	FEB.	MAR.	APR.	MAY	JUNE	JULY	AUG.	SEPT.	OCT.	NOV.	DEC.	TOTAL
<b>SEASONAL</b>													
Attendance operations													
Exhibits													
Event:													
Event:													
Event:													
Seasonal subtotal													
<b>SUMMARY</b>													
ADMINISTRATION													
MAINTENANCE													
OTHER FUNCTION													
SEASONAL													
<b>TOTAL SALARIES</b>													
<b>BENEFITS</b>													
<b>TOTAL MONTHLY SALARIES &amp; BENEFITS</b>													





## APPENDIX





Appendix A

**DIMENSIONS OF THE CALIFORNIA FAIR NETWORK**

Profile of Fairs, Fairgrounds, and Fair Organizations					
	District Agricultural Association (state institutions)	County (Local government)	County (Nonprofit organizations)	Citrus Fruit Fair	State Fair
Number	54	2	22	2	1
Appointing authority for board of directors	Governor	Board of Supervisors	Elected by the organization or a blend of county appointments and organization elections.	Elected from the fair association's membership.	Governor and legislature
Board of Directors	9 members	5-34 members	7-34 members	9 members	15 members
Fairgrounds	<ul style="list-style-type: none"> <li>• 44 - State property.</li> <li>• 4 - County, city or public agency property.</li> <li>• 1 - Tenant of another fair organization.</li> <li>• 5 - No property (rented office space or property for production of the fair).</li> </ul>	<ul style="list-style-type: none"> <li>• State property</li> <li>• County property</li> </ul>	<ul style="list-style-type: none"> <li>• State property</li> <li>• County property with short- or long-term leases as part of operating contract.</li> </ul>	State property	State property
Employee status	<ul style="list-style-type: none"> <li>• Civil Service</li> <li>• 119-day temporary</li> <li>• Other</li> </ul>	County	Locally determined	Private	<ul style="list-style-type: none"> <li>• Civil Service</li> <li>• 119-day temporary</li> <li>• Other</li> </ul>

**VITAL STATISTICS OF THE CALIFORNIA FAIR NETWORK**

Budget Range	Economic Impact	Real Estate	Number of full- and part-time employees	Number of full-time jobs created as a result of fair and fairground activities <sup>1</sup>	Horse Racing
\$350,000-\$30 million. Fair organizations are classified by size of annual operating revenue; the classification determines the amount of annual allocation.	\$1.6 billion generated at fairs and fairgrounds interim (non-fair) events. \$155 million generated in operating revenues annually. \$160 million generated in state and local tax revenues.	5,526 acres 76 locations 3,000 buildings? Current market value: estimated aggregate of \$1 billion.	3,000 full- and part-time employees work at fairs and fair organizations.	27,000-30,000	9 - Live race meets during the annual fair. 23 - Simulcast racing (inter- and intra-state satellite wagering on live horse races).

<sup>1</sup> Full-time jobs based on annual wages of \$20,000; estimate derived from total payroll taxes generated in aggregate.  
<sup>2</sup> Structures include grandstands and racetracks (for motor sports or horse racing); barns, show rings, arenas, exhibit buildings, offices, tack rooms, dormitories (for junior livestock exhibitors and live horse race meet employees), restaurants, permanent food concession stands, golf ranges, pools, skateboard parks, roller rinks, RV parks, bathrooms and shower facilities, greenhouses, classrooms, warehouses, maintenance yards and shops.

## Appendix B

**REINVENTION CONSULTANTS**

[Alphabetical order]

Name	Expertise	Background	WORKED AT/FOR:				
			ED	IMP	NA	MO	NET
Michel ANDERSON	Business & land use consulting	Business and land use consultant based in San Diego county since 1985. Consulting practice includes political and governmental relations in connection with major development projects. From 1983 to 1985, responsible for business policy development and planning for the City of San Diego. Prior to that time, served as chief aide to president of Shapell Industries, Inc. on matters relating to daily operations of one of California's leading homebuilders.		X			
Patricia COHEN- ALBRECHT	Communication with Hispanic markets	Founded Cohen Latino Communications (CLC) in 1986. Marketing professional specializing in Spanish language communications. Prior to founding CLC, worked in creative and production services department of Los Angeles-based Mendoza, Dillon & Asociados, largest Hispanic advertising agency in the U.S.		X			
EDAW, Inc.	Landscape architecture, planning, urban design, environmental analysis, site engineering, and graphic design	Founded in 1939. Nationally recognized for place-making urban design, strategic master planning, landscape architecture, and environmental planning. Maintains a staff of more than 200 experienced professionals, with offices in major cities throughout the United State and overseas. Specializes in land-based assignments requiring a thorough look at all sides of an issue, including balancing competing environmental, social, and economic objectives. Recognized international expert in tourism and visitor attractions, civic centers and cultural districts.	X				
Anne Hays EGAN	Strategic planning, organizational development, board development, fundraising	Consulting partner with New Ventures Consulting in Santa Fe, New Mexico. Her experience includes 20 years as a nonprofit executive, corporate consultant, and nonprofit consultant. Creator of Nonprofit Quality Assurance, an in-depth organizational assessment process that generates computer-assisted reports. Ms. Egan was a member of the initial assessment team at the three original reinvention pilot sites.	X	X		X	X

ED = El Dorado County Fair    IMP = Imperial Valley Exposition    NA = Napa Valley Exposition  
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Name	Expertise	Background	WORKED AT/FOR:				
			ED	IMP	NA	MO	NET
Jim EGGEMEYER	Land use planning and landscape architecture	Private consultant in the San Francisco Bay Area, providing services in the areas of land planning, landscape architecture, and processing projects through public regulatory agencies.	X				
Claude GRUEN, Ph.D.	Economics, financial analysis	<p>Urban economist. Combines forecasts of market potential with financial analysis to identify development, redevelopment, and other property-related strategies that serve economic interests of property owners, investors, and public agencies. Assists government agencies in formulating successful reuse or disposition and sales strategies for real estate.</p> <p>While on the faculty at the University of California, Berkeley, Dr. Gruen helped develop socioeconomic land use and transportation models. Published in fields of urban economics and land use policy analysis. Writes monthly column for the <i>Institutional Real Estate Letter</i>, a publication that serves the country's pension fund real estate investors.</p> <p>With Nina G. Gruen, Dr. Gruen co-founded Gruen Gruen + Associates (GG+A) in 1970. GG+A is an economics and real estate development and policy research and consulting firm, headquartered in San Francisco, with another office in Chicago. Since 1970, GG+A has pioneered the integration of behavioral research and econometric analysis to provide a sound foundation for successful real estate land use policy and economic development.</p>	X				
Nina J. GRUEN	Sociology, market and survey research	Executive vice president and principal sociologist in charge of market research and analysis at Gruen Gruen + Associates (GG+A) since co-founding the firm in 1970. Applies social science methods to estimating demand for real estate and understanding the behavior of groups who determine the success of development, planning, and public policy decision-making. Pioneer in synthesizing results of behavioral research with quantitative time-series data to forecast market reactions. Frequent contributor to such publications as <i>The Journal of Property Management</i> , <i>Forum</i> , and <i>Urban Land Magazine</i> .	X				X

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Name	Expertise	Background	WORKED AT/FOR:				
			ED	IMP	NA	MO	NET
Leslie HOLLISTER	Governmental relations and community analysis	Senior Associate of James Burchill and Associates, Inc., Leslie Hollister develops and implements public and governmental relations strategies, coordination of research and community analysis, and development of concepts and copy for editorial and advertising products. In addition to coordinating political campaigns, for four years, Ms. Hollister supervised Solano County's participation in the California State Fair's Counties Exhibits Program, spearheaded the drive to acquire annual project funding, developed design themes, and handled press relations.  James Burchill and Associates, Inc., a Davis firm founded in 1982, specializes in governmental, community, and media relations, with additional expertise in crisis communications, community analysis, research, advertising, and Internet consulting.	X				X
Stephen K. HOPCRAFT	Communications, governmental relations	President of Hopcraft Communications, founded in 1989. Hopcraft Communications is a full-service public relations firm, specializing in grass roots and public education campaigns.	X				
Peter McGUGAN	Facilitator, change manager, psychologist, best-selling author	An award-winning journalist and documentary film producer, Peter McGugan is a familiar personality within the fair industry, having appeared at several Western Fairs Association meetings as a speaker and facilitator. Mr. McGugan led the project team for initial assessments at the reinvention pilot sites.	X	X		X	
D.B. (Blake) MIDDLETON	Architecture, land use planning	Formerly associate partner with Polshek and Partners Architects in San Francisco; now a principal with Gary Edward Handel & Associates in San Francisco and New York. Mr. Middleton was the design principal for the American Center for Wine, Food, and the Arts in Napa, California. He also led community workshops to help the Napa Valley Expo explore options for its future redevelopment.	X	X	X		X
Jock O'CONNELL	International trade	President of O'Connell Associates in Davis, California. Assists primarily foreign-based small and medium-size enterprises in exploiting business opportunities in U.S. Also advises foreign governments and foreign commercial organizations on economic, regulatory, and political developments in the U.S. that might affect commercial relations with this country.		X			

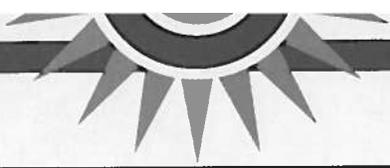
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Name	Expertise	Background	WORKED AT/FOR:				
			ED	IMP	NA	MO	NET
Michael O'HARE, Ph.D.	Public policy	Professor of public policy at the Goldman School of Public Policy, University of California, Berkeley. A trained architect and engineer, and a former state environmental official in Massachusetts, Dr. O'Hare currently teaches courses in public management, arts and cultural policy, program and policy design, and quantitative methods. Previously taught urban planning at the Massachusetts Institute of Technology and public management at Harvard. Research includes work in environmental affairs, management, arts policy, and pedagogical practice in higher education. Dr. O'Hare was an original member of the Reinvention Project Steering Committee and has continued to serve the reinvention team as an ad hoc advisor.	X	X			X
Louis PATLER, Ph.D.	Strategic planning, organizational development, board development	President of The B.I.T. Group, an international consulting, strategic research, and corporate training company. Dr. Patler brings pioneering technologies for creative thinking, practical problem solving, and unparalleled quality service initiatives to Fortune 500 companies, multinational corporations, and foreign governments. He was a member of the reinvention core team for nearly two years, working with pilot fairs and their boards, and also led an effort to analyze and assess the effectiveness of the Division of Fairs & Expositions.	X	X	X		X
Michael PHILLIPS	Business development	Business consultant in San Francisco. Source of innovative ideas since first job in banking, when he organized MasterCard, created the first consumer certificates of deposit, and developed modern corporate cash management. Has advised the largest corporation in the world (a Japanese trading company) as well as more than a thousand small businesses from Seattle to Stockholm to Katmandu.  New book: <i>Gods of Commerce: How Business Really Works</i> (Clear Glass Press, 1997). Collaborated with Salli Raspberry to write three other widely known books: <i>The Seven Laws of Money</i> (1974, 1993); <i>Honest Business</i> (1981, 1996); and <i>Marketing Without Advertising</i> (1986, 1997).  Imperial Valley Expo retained Mr. Phillips to develop standardized facility rental rate structure and begin identifying prospective business partners for IVE in the Imperial Valley area.	X	X			

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Name	Expertise	Background	WORKED AT/FOR:				
			ED	IMP	NA	MO	NET
Lewis RIDGEWAY, CPA	Financial management, cost and financial analysis, accounting systems design	Partner in Sacramento accounting firm in charge of business consulting. Licensed CPA with master's degree in financial management, management information systems, and operational audit. An experienced cost and financial analyst, Mr. Ridgeway has performed financial and operational system reviews for governmental and private organizations, evaluated pricing alternatives, prepared business plans, conducted investigations, and provided litigation support. His consulting work includes 11 fairs. He participated in the initial and exit assessments at all the reinvention pilot fairs and has presented financial management workshops at Western Fairs Association conferences and conventions.	X	X	X	X	X
John SALMON	Public/private business opportunities, organizational development, land use	Accountant and attorney, with offices in the Bay Area. Specializes in consulting to all levels of government on issues related to public real estate, based on his belief that the public sector has many opportunities to save costs and generate revenue by more efficiently managing its facility usage as well as land and building resources. From 1989 through 1994, served as director of the Governor's Office of Asset Management. During the 1980s, served as vice president of development and sales for Catellus Development Corporation, responsible for its 3 million-acre national land portfolio and building program. During the 1970s, served as tax accountant with Arthur Young & Company and then practiced real estate and corporate law in Chicago. Mr. Salmon was the project manager for a team of economists, market researchers, and land use planners assigned as consultants to the El Dorado County Fair.	X	X	X		
Karen SPENCER	Graphic design, design communications, marketing and advertising	Creative director and business manager of Spencer and Benson, a marketing, advertising and graphic arts firm. In addition to being a graphic designer, Karen Spencer writes copy and works with photographers and illustrators. Previous to starting her own firm, Ms. Spencer worked at two full-service advertising agencies and as advertising director for a national corporation. Her background in marketing influences her design to insure that function is as important as form.		X			X

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Name	Expertise	Background	WORKED AT/FOR:				
			ED	IMP	NA	MO	NET
Steven M. WEISS	Food trends, marketing	<p>Honor graduate of Culinary Institute of America and former executive food and beverage editor of <i>Restaurants &amp; Institutions Magazine</i>. Currently an independent consultant to the food service industry, working with chain and independent restaurant organizations, contract food service companies, food and equipment suppliers, and leading food service marketing organizations to provide assistance with strategic planning, trend analysis, menu concept and food product development, employee training, program management, media contact, and representation and sales.</p> <p>Worked with Imperial Valley Expo to help develop new concessions promotions, activities and pricing strategies. Currently under contract with Western Fairs Association to research sponsorship opportunities for California fair industry and develop collection of fair industry best practices.</p>	X	X			X

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## Appendix C

**RECOMMENDED READING**

The following publications, articles, or websites have been particularly useful to the core team. This list is not comprehensive or even exhaustive, but simply a list of recommended reading.

**BOOKS AND REPORTS**

- Addison, William. *English Fairs and Markets*. London: B.T. Bastford, Ltd., 1953. (OUT OF PRINT.)
- Auerbach, Susan. *How to Grow a Multicultural Community Festival: A Handbook for California Organizations*. Los Angeles: Los Angeles Cultural Affairs Department, Folk and Traditional Arts Program, 1991.
- California Arts Council and KPMG Peat Marwick LLP. "A Case Study of Seven California Festivals: The Arts as an Economic Partner." In *The Arts: A Competitive Advantage for California*. Sacramento: California Arts Council, 1994.
- Cameron, Julia and Mark Bryan. *The Artist's Way*. New York: B. P. Putnam's Sons, 1992.
- Gregson, Bob. *Reinventing Celebration: The Art of Planning Public Events*. Connecticut: Shaman Press, 1992.
- Hammer, Michael, and James Champy. *Reengineering the Corporation: A Manifesto for Business Revolution*. New York: Harper Business, 1993.
- Hargrove, Robert. *Mastering the Art of Creative Collaboration*. Los Angeles: McGraw-Hill Business Week Books, 1998.
- Hesselbein, Frances, Marshall Goldsmith, Richard Beckhard, and Richard F. Shubert, eds. *The Community of the Future*. New York: Jossey-Bass, The Peter F. Drucker Foundation for Nonprofit Management, 1998.
- Howard, Phillip K. *The Death of Common Sense*. New York: Random House, 1994.
- Kretzmann, John P., and John L. McKnight. *Building Communities from the Inside Out: A Path Toward Finding and Mobilizing a Community's Assets*. The Asset-Based Community Development Institute, Institute for Policy Research, Northwestern University. Chicago: ACTA Publications, 1993.
- Kriegel, Robert J., and Louis Patler. *If It Ain't Broke, Break It!* New York: Warner Books, Inc., 1991.
- Marling, Karal Ann. *Blue Ribbon: A Social and Pictorial History of the Minnesota State Fair*. St. Paul: Minnesota Historical Society Press, 1990.
- Merrill, Louis Strong. An oral history conducted in 1985 by Gabrielle Morris, Regional Oral History Office. In *A Lifetime at the Fair: California Local, District, and State Fairs, 1920-1970*. Berkeley: The Bancroft Library, University of California, 1987. (OUT OF PRINT.)
- Osborne, David, and Ted Gaebler. *Reinventing Government: How the Entrepreneurial Spirit is Transforming the Public Sector*. New York: Penguin Books, 1993.
- Ostrom, Elinor. *Crafting Institutions for Self-Governing Irrigation Systems*. San Francisco: International Center for Self-Governance, 1992.
- Phillips, Michael, and Salli Raspberry. *Honest Business: A Superior Strategy for Starting and Managing Your Own Business*. New York: Random House, 1981.
- Phillips, Michael, and Salli Raspberry. *Marketing without Advertising: Creative Strategies for Small Business Success*. Berkeley: Nolo Press, 1986.
- Senge, Peter M. *The Fifth Discipline*. New York: Doubleday, 1990.
- Senge, Peter M. *The Fifth Discipline Fieldbook: Strategies and Tools for Building a Learning Organization*. New York: Doubleday, 1994.



U.S. Department of Housing and Urban Development. Office of Public Affairs. *The Urban Fair: How Cities Celebrate Themselves*. Report prepared by Nancy Lee, B.C. May, and Jack Porter. HUD-PA-661. Washington, D.C., 1981. (OUT OF PRINT.)

Weisbord, Marvin R., and Sandra Janoff. *Future Search: An Action Guide to Finding Common Ground in Organizations and Communities*. San Francisco: Berrett-Koehler Publishers, Inc., 1995.

Wheatley, Margaret. *Leadership and the New Science*. San Francisco: Barrett-Koehler Publishers, Inc., 1992.

## MAGAZINES AND/OR ARTICLES

"Financial Woes No. 1 On Problem List." *Fair Dealer* 17, No. 3, March 1959.

"Governor Asks to End Special Financing Plans." *Fair Dealer* 17, No. 3, March 1959.

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## WEBSITES

(These sites are only suggestions for places to start – where they will lead is half the fun.)

### For information about fairs:

*Fairs Net* (published by Western Fairs Association)  
[www.fairsnet.org](http://www.fairsnet.org)

### For information about fundraising:

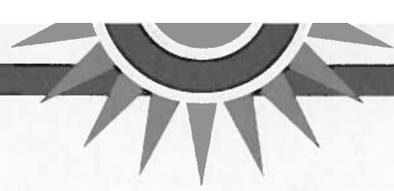
*The Foundation Center Online*  
[www.fdncenter.org](http://www.fdncenter.org)  
*IEG Network Home Page*  
[www.sponsorship.com](http://www.sponsorship.com)

### For information about community-building:

*The Communitarian Network*  
[www.gwu.edu/~ccps](http://www.gwu.edu/~ccps)  
*The Independent Sector Home Page*  
[www.indepsec.org](http://www.indepsec.org)  
*The Pomegranate Center Home Page*  
[www.blueworld.com/iol/culture\\_community/pomegranate/toc.html](http://www.blueworld.com/iol/culture_community/pomegranate/toc.html)

### For information about nonprofit management:

*The Management Center Home Page*  
[www.tmcenter.org](http://www.tmcenter.org)  
*Support Centers of America*  
[www.igc.org/sca](http://www.igc.org/sca)  
*The National Center for Nonprofit Boards*  
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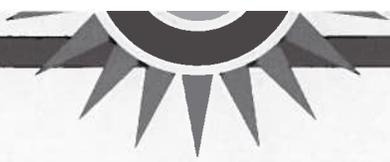




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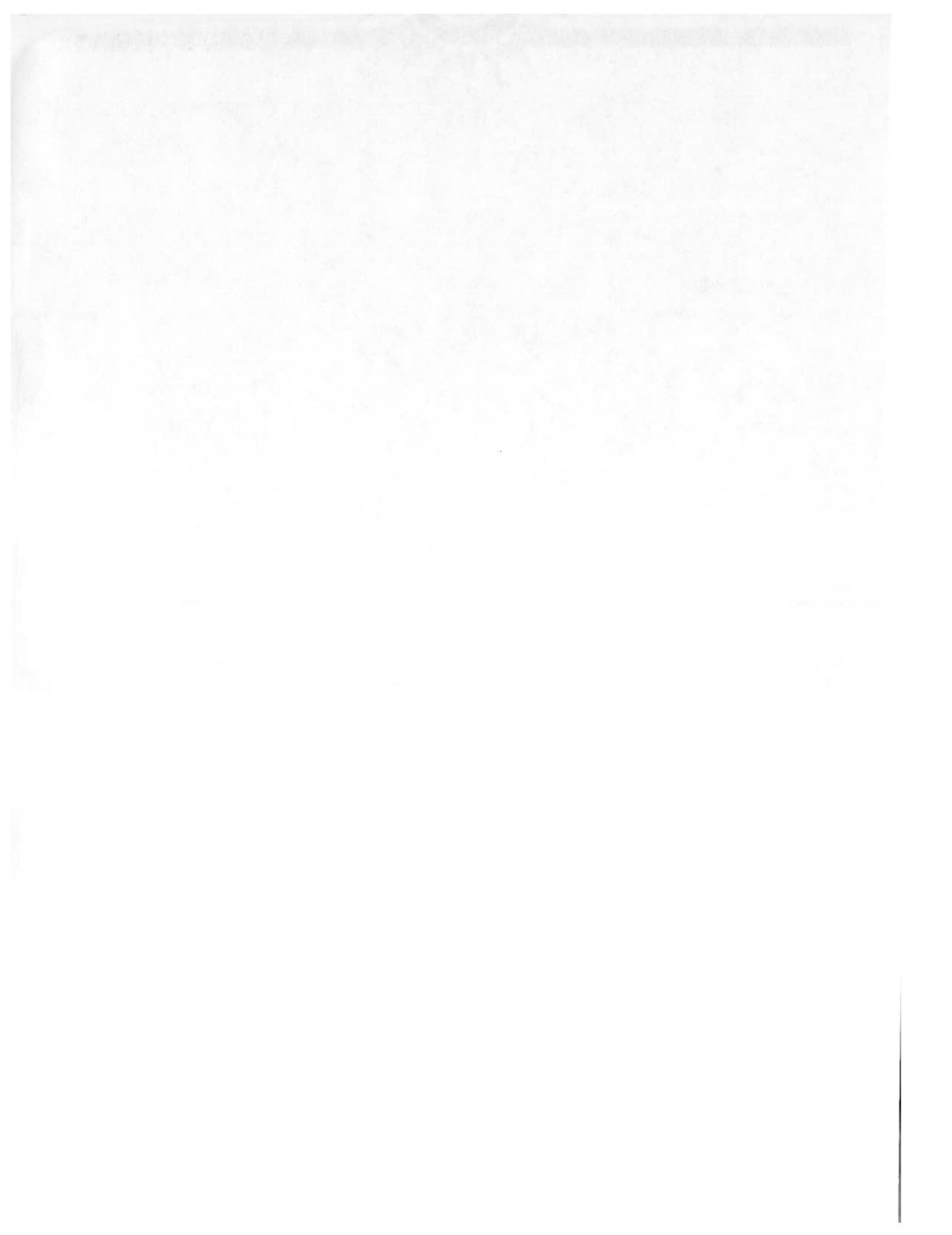
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