

July 10, 2012

To: NRESC
From: Bird Festival Feasibility Study Team
(Peter Plastrik, Eric Myers, Angel LeFevre, Cathy Dewey)
Re: Findings

Our group, chaired by Peter Plastrik, has studied the feasibility of holding a bird-watching festival on Beaver Island. We interviewed experts, looked at how-to guides and Web sites of festivals, and offered our own views about a festival's design based on our expertise. Our purpose was not to plan a festival, but to determine what it would take to hold a festival and whether the Island could meet those requirements.

Finding

There are many reasons to think that Beaver Island could successfully conduct an annual bird-watching festival. The Island has a unique and attractive set of assets for a festival, and there appear to be many people on- and off-Island who would want to help make it happen. A festival could generate important potential economic and environmental benefits. But getting from "here to there" – from hypothetical feasibility to a successful festival – will require sustained, effective leadership; commitment of financial and other resources, such as lodging; planning that starts almost immediately; and meticulous implementation and coordination.

The following material describes our research activities, provides a feasibility analysis, and then describes the likely steps in a planning process. Following that there are background material and copies of emails reviewing the research findings.

Research Activities

Interviewed three "bird people" – Kay Charter, who started the Leelanau festival; Donna Hardenberg, an avid birder and Islander; and Matt McDonald, an avid birder who knows the Island well and who, with spouse Melissa, has organized birding events in Wisconsin. Pete also participated in a CMU field trip led by Nancy Seefelt, assistant professor of biology and bird researcher at the CMU Biological Station, and looked at Web sites of a few festivals and read a booklet on how to put on a bird festival. Note that in previous conversations with others Donna had said that she didn't think it was feasible to hold a festival next spring, but during our interview she said she was "retracting" that conclusion and thought it might be feasible. Pete wrote up a draft of feasibility analysis, which members of the study team reviewed and commented on; then it was revised.

Feasibility Analysis

1. *There's no doubt that Beaver Island archipelago has unique assets that could be very attractive for birders.* We have the birds, especially during the spring migration of neo-tropical birds. We have a unique location – a fairly undeveloped island with multiple

habitats, and uninhabited outer islands. About 230 types of birds use the archipelago and CMU's habitat on the East Side has had 100 species. We have a large number of public sites for bird watching, all across the Island. We have the CMU bird research, which includes acoustic monitoring of night flyovers and "morning chorus." We have the Odawa tribe, which conducts eagle research, including Google Earth tracking of Island-based eagles wearing transmitters. And we have a core of committed birders who know what the "bird market" is like, have connections with many other birders, and want to share the Island with other birders.

2. ***The optimal timing for an Island festival is spring migration, after Mother's Day, before the end of May.*** Although a festival could be held at other times, such as fall migration, the Island's spring migration will be most attractive to birders. Also noted is that this timing is in the shoulder season when not much else is bringing people to the Island, so it could have maximum economic impact. (Note: An Island festival should be scheduled so it does not conflict with the Leelanau festival.)
3. ***The Island has enough potential birds and viewing sites, as well as potential related activities, to hold a two-day weekend festival.*** Some places have weeklong birding events, while other places hold one-day events. A shortened, weekend version of the Leelanau festival model – 5 days--seems to make the most sense for the Island, in part because of our unique transportation requirements. Participants could come to the Island late Friday, stay over Saturday night, and leave late Sunday afternoon. Some might stay over Sunday night as well, but there wouldn't be planned activities Monday. (Note: The 2012 ferry schedule before Memorial Day weekend only has morning departures from Charlevoix on Fridays in May and morning departures from Beaver Island on Sundays. More below on transportation issues.)
4. ***The Island will have to prepare and coordinate some of the festival "hosting" functions – shelter, food, transportation, and troubleshooting primarily – to ensure a successful festival.*** The Island faces some unique challenges due to its location, infrastructure, and seasonal economy.
 - 4.1. Shelter. Because a May festival would be in the off-season, a sufficient number of "beds" – at motels, B&Bs, or private cabins – would have to be pre-committed so that the number of birders anticipated would be able to make reservations well ahead of the festival.
 - 4.2. Food. If the festival included a banquet dinner on Saturday, an Island restaurant would have to be lined up for that purpose.
 - 4.3. Transportation. Although it's possible that some festival participants would bring vehicles to the Island on the ferry, most will arrive without transportation. Some may want to rent a car so they have freedom of movement, but this would also increase the

cost of their visit. It seems likely that the Island will have to organize transportation for small groups of birders (10-15 people) taking field trips Saturday and Sunday. In addition, bicycles should be available (for rental).

- 4.4. **Troubleshooting.** Imagine 50-100 people coming to the Island for a weekend in May. If something goes wrong, what should they do, who do they call? It seems advisable that there be a festival “manager” who ensures smooth coordination of activities and is the all-weekend on-call person to solve any problems that come up and respond to emergencies.
5. ***Marketing an Island festival to the birding community should be done mostly through no-cost word-of-mouth and social-media marketing led by birders who know the Island and northern Michigan and Michigan birding organizations, not through paid advertising.*** The Island is well positioned to use a “network marketing” approach because there already are many birding enthusiasts who know the Island well and are prepared to support a festival. Birders are a specialized market niche – most are 50 or older, college educated, substantial disposable income; often couples, rarely with their children – best reached through people and organizations they know/trust. It is essential to have a good Web site for the festival and an online mechanism to register for the festival.
6. ***A birding festival is a good opportunity to promote community education about birds and their habitats.*** Overall, a festival is also a “community education” opportunity. There are many ways to engage Island residents in bird-related activities as a part of the preparation and/or implementing of a festival. Birding organizations provide free educational materials. (A one-day event that the McDonalds help to organize in Wisconsin included education about use of lead-free sinkers, preventing bird-window collisions; developing stop-over habitats for migrating birds; and food sources for birds.) Students in the Beaver Island and Lighthouse schools could volunteer at the festival and some festival activities could be designed for them.
7. ***A successful festival requires expertise about birding on the Island/archipelago.*** Holding a festival is not just a matter of saying, “Y’all come.” To attract and satisfy birders, it will be essential to provide:
 - 7.1. An accurate map of public viewing sites and what sorts of birds might be seen, based on knowledge about current nesting and previous viewing. This knowledge exists among Island birders but has not been compiled.
 - 7.2. Field trip leaders to guide field trips, who are knowledgeable about the Island’s habitats and birds and have experience leading birder groups.
8. ***An Island festival could be made more attractive by “displaying” some of the unique assets mentioned earlier.*** These assets might include presentations by CMU about its bird

research, or by the Odawa tribe about its work with eagles, or by Island naturalists about other Island birds (loons, e.g.). Another possibility would be to organize an optional field trip to one or more of the outer islands.

9. *There's a good chance that the economics of a festival could (a) cover the festival costs and (b) generate a new off-season pay day for Island transportation, hotel, and restaurant businesses.*

9.1. Festival costs. The main costs for holding a festival will be

9.1.1. Website and registration mechanism. The Leelanau festival outsourced development of a web site and handling of online registration.

9.1.2. Additional promotional/marketing materials.

9.1.3. Field trip leaders. Some people on the Island might be qualified/interested in doing this. Anyone coming to the Island to do this would want at least their expenses covered.

9.1.4. On-island transportation for field trip groups. Depending on the volume of festival participants, we'll need vans to carry people, with drivers and insurance and gas money.

9.1.5. On-call coordinator. This may be a position that is unique to doing a festival on the Island, but for the reasons mentioned earlier it seems essential and, I believe, should be a paid position.

9.1.6. Guest speakers. Having speakers is an option, but one that Kay Charter strongly recommends. Some speakers would want their expenses covered, others—those more highly sought—would charge a fee of up to \$1,000.

9.1.7. Orientation materials/greeter. Putting together Beaver Island orientation packets, distributing them, and welcoming birders—all part of being a good host—requires materials and labor.

9.2. Off-season pay day. Before Memorial Day there's not much weekend traffic to the Island. Assuming that 50 people came to the Island for the festival, which is half of what the Leelanau festival attracted in its first year, and that 30 of the people were couples and 20 were single individuals, we can conservatively project potential revenues:

9.2.1. Transportation. 50 people flying roundtrip at \$90 each = \$4,500. (Note: some may choose to travel by ferry, which would generate less revenue per roundtrip.)

9.2.2. Lodging. 15 couples and 20 individuals at \$75 per night x 2 nights = \$5,250.

9.2.3. Food. 50 people eating 2 breakfasts and lunches (Saturday and Sunday) and 2 dinners (Friday and Saturday), figuring \$50 each person for a breakfast-lunch-dinner X 2 = \$2,000.

9.2.4. Additional revenues could come from car/bike rentals and/or ferrying of vehicles, purchase of merchandise. Assume additional expenditures of \$30 per person during the weekend = \$1,500.

9.2.5. Total revenues for businesses the festival weekend = \$13,250. Every additional 15 people (same configuration of couples/singles) would generate nearly \$4,000 in additional revenue.

10. *Charge a registration fee to cover most/all of the festival organizing costs.* Some festivals are free, some charge a registration fee. Leelanau charged a \$35 fee its second year, after having no charge the first year. This caused some complaints and Kay Charter recommends starting with a fee. Assuming a \$40 fee per person and 50 people registering, how far would that go to covering likely costs? A budget for the festival requires making some assumptions that could be changed, but here's a shot at modeling a budget:

ITEM	COST	ASSUMPTIONS
Web site development + maintenance; registration	\$500	This amount is what Leelanau festival paid for web site development & hosting
Promo/marketing materials	\$100	
Field trip leaders	\$1000	4 trip leaders; charging expenses only (\$250 each)
On-Island transportation	\$600	4 vans for 2 days, drivers, insurance
On-call coordinator	\$300	Flat fee for weekend
Guest speaker	\$500	1 Speakers; charging expenses and small honorarium
Materials/greeters	\$100	Rough estimate
TOTAL	\$3100	

Costs could be somewhat higher or lower, but based on the assumption of 50 people and a \$40 registration fee **the festival's costs are likely to exceed revenues from registration fees.**

11. *We're running out of lead time to put together a successful festival.* Several people have said it takes about a year to put together a festival, especially lining up field guides and guest speakers. In the Island's case, it's imperative to decide soon if we have...

- 11.1. Sufficient Good Viewing Sites--the mix of bird viewing sites, based on knowledge of nesting and previous viewing. It's been suggested that getting Seefelt, Hardenberg and Jacqui LaFreniere together would allow us to determine this.
- 11.2. Sufficient # of Field Trip Leaders – to handle a two day event.
- 11.3. A bird list for the Beaver archipelago.
- 11.4. Sufficient funding and lodging committed – enough to cover the start-up costs of a festival and potential gap between registration fees and festival costs.

Likely Steps in Planning Process

1. **Identify leadership team** that takes responsibility for planning and implementing festival. ; Staging a festival is not a small undertaking; it will require leadership that is deeply committed to the task and capable of organizing the Island's resources.

2. **Complete the feasibility study:** Work with Seefelt, Hardenberg, and other experts to identify sufficient bird viewing sites and a sufficient number of field trip leaders for a festival.
3. **Secure commitments of key resources.** The most critical commitments, without which it won't be possible to pull off a festival, are financial resources to cover a gap between costs and registration revenues, and the commitment of sufficient lodging to house an influx of birders for the festival weekend.
4. **Design the festival.** Determine the dates the festival will be held and the model of the festival, as well as which of the many possible additional activities should be scheduled for the festival. Many people have ideas about what could be done in addition to the core field trips in a festival.
5. **Develop full-scale implementation plan** with tasks, responsibilities, and timelines.

Background Information

- Leelanau Peninsula Bird Festival at <http://www.mibirdfest.com/>.
- <http://birdday.org/> - international migratory bird day and conservation education
- ebird.org - observation records, maps, etc. Hugely popular for both researchers and amateurs. eBird data for the island is pretty weak at this point.
- A bird checklist from Gull Harbor: <http://ebird.org/ebird/view/checklist?subID=S8565226>
- a map record of all osprey observations for the Island. Click on the markers for the full checklists. <http://ebird.org/ebird/map/osprey?neg=true&env.minX=-86.42051696777344&env.minY=45.235734007972006&env.maxX=-84.11338806152344&env.maxY=46.03749263453821&zh=true&gp=false&mr=1-12&bmo=1&emo=12&yr=1900-2012&byr=1900&eyr=2012>
- Aldo Leopold Foundation's IBA website Matt McDonald designed. Check this out for the Google map, some eBird data integration and 'gadgets', etc. <http://www.aldoleopold.org/Programs/iba-volunteer.shtml>
- Larkwire.com- a great resource for learning birdsong. McDonald: I can't recommend this enough. Great thing for a guide to have on an iPad in the field.
- BirdCity Wisconsin: birdcitywisconsin.org
- Sauk Prairie's Bird City page (work in progress) <https://sites.google.com/site/saukprairiebirdcity/home>

Email from Eric Myers

I will go over this in more detail, but one thing I thought of, to follow up on Pam's comment is that when the birding festival gets going, we could always have a talk Friday night about "Get to know Beaver Island" where the speaker shows and hands out maps (with roads) of the island showing the various habitats, maybe some info. specific for that year. (Where birds have been seen already etc.) This would allow people to pick where they want to go.

Biking to some places is possible, I think the Island has and should continue to push bikes as a mode of transportation and I think we could have people walk to Gull Harbor and maybe to Little Sand Bay along the beach from town. I agree we will definitely have to have some vans to transport people to specific sites once we determine which sites are the best ones.

Email from Angel LeFevre

Transportation: To keep costs down, this may be a time to offer one way boat (Friday morning may be good for some folks and would extend their stay) and one way plane tickets. That would lower the transportation costs and give participants a full Beaver Island experience.

Troubleshooting: I think the "festival manager" idea is key to this succeeding. If folks have one person as a go to, there is a level of security in booking a trip that is this unusual. I think the manager could have some helpers too. The one that jumps to mind are the stragglers who will simply need rides places when they get lost or confused.

Marketing: What a win-win. Networking and social media are for the most part free. I think it would be best if one person (Festival Manager??) control this as it could get messy is 12 people are trying to post and update.

Festival Costs - Website: Would it be possible to defer the cost of a website until year 2? There is that big "what if it doesn't go well" in the back of my mind and there has been an investment in a website. How about a very nicely done Face Book page (free) that could serve as the Festival site? All of the other, bigger BI websites and FB pages (BIBCO, IA, etc.) could publicize it. Or other birding sites could publicize it? If there is a Festival Manager in the first year, maybe skip website for booking.

Email from Kay Charter

Great job of outlining needs for a birding festival. A couple of comments:

Birding trips are more accurately referred to as "field trips," and those who lead them are called "field trip leaders." Attendees will know, if we use "guides," that we aren't in the know about nomenclature. So in your itemized budget (and in other places), I'd change "field guides" to simply "leaders."

I would recommend that you only use one speaker for the first year. Participants are largely coming for the birds; speakers are icing on the cake, but if the cake is good enough, it doesn't need much (if any) icing. Super birder (and terrific speaker), Brian Allen will come for the entire weekend for expenses and a \$250 fee. He is one of the best field trip leaders I know. He will lead trips as long as he is there, if you opt to have him. He is not a known name in the birding world, but he is one of the best speakers I've ever heard.

I had hoped we could include the Inland Seas Schooner, but Tom said he can't do that before school is out. He's already booked five days a week, and he does the Leelanau event. If he added one at BI, he would be working too many straight days in a row. If we change the date to the weekend after Leelanau, we'd be talking about the second weekend in June. That he can likely do. But migration would be the best time, in my mind (ask Donna and

the others about this) -- and I would stick to the third weekend in May.

My guess is that you can get leaders from the Petoskey Audubon Club by simply offering them food and lodging.

Email from Matt McDonald

Here are some of my thoughts: Promotions in birding forums, facebook sites, magazines, etc in Michigan, Illinois (Chicago), Ohio, Wisconsin would pay off in reaching a wider audience and be very inexpensive. Really tout CMU's activities, Little Traverse Conservancy's work, the serenity and uniqueness of the island, etc. There used to be a loon nesting monitoring program, it was mentioned in one of the Journals of BI History.

Regarding a website, I believe we could use free website builder like Google Sites and register, for a small fee (\$15/year) a domain name like beaverislandbirdfest.org and link that name to the free site. We're working on doing that for a community migratory bird day website here. I believe you'd find that the small cost incurred would be minimal compared to the costs and resources involved with printing off and mailing registration packets. Having a website allows you to build and maintain google maps, eBird links, links to the Chamber, upload documents for printing, photo galleries, etc. Absolutely essential and I agree with Angel, a free Facebook site is also essential.

I'm glad that Eric and others want to push 'green' birding- having given up car birding in favor of a decent bike, I can attest that you hear and see far more than when driving. There will be those who want to be driven place to place, for sure, but I also believe there are others who would enjoy the serenity of a bike trip. An easy morning trip would entail a trek out to Gull Harbor, down King's Highway, and then out to LSB, Barney's Lake, or Donegal Bay. I think this could be an option offered that would entail minimal overhead- some bike rentals, a guide, someone back at home base ready to jump in a vehicle and help fix a flat.

Finally, I'd recommend not overlooking the competitive side of this endeavor. I've been to 2 festivals, one of which was in Texas. One of the offered trips was a 'Big Day' competition where participants gathered way earlier than everyone else and spent every last minute of the day attempting to rack up as many species as possible. Might not appeal to all, but something like this (or a 'Green' big day spent biking) can be included at low cost to appeal to some lister-types.

I also think the idea of a Fest Manager will facilitate smooth communication this first year.

Email from Pam Grassmick

A couple of quick comments for your consideration based on Pete's notes: Under 4.3 and 7.0-Birders like to be driven and have a guide take them to the site. People unfamiliar with the Island may have difficulty identifying public and private lands-just like hunters, they don't want to be trespassing.

8.0 We should identify conservation practices occurring for birds. It's not enough to say, "please come and spend \$\$" Explore swift towers, natural area habitat improvements, forestry practices, ect.

8.1 Kay Charter said that a birding festival would be more successful if combined with other nature related events such as a botany tour-talk to the Leucks.

Email from Kay Charter

Pete has certainly done a terrific job laying out the possibilities, and the tasks, associated with a BI festival. You can do it (we did it; just involves a bit of cash and some committed volunteers), and -- if

you move right along, you can plan it for next spring. I will be happy to be there for your festival to offer any help I can, IF you plan for the weekend before our festival. (Note that I am not a good enough birder to be a field trip leader.) One thing I don't see, that you must work out, is someone to take the fiduciary responsibility. A non profit or governmental entity that will take in funds and pay your bills.

Also, Leelanau's festival runs Thursday through Sunday. Participants register and pick up packets on Wednesday, so you will notice that our info states five days. You might want to say Fri-Sunday, and plan for an outing in the afternoon on Friday. Your festival would then be three days.

Finally, my recommendation for a speaker for Saturday evening would be Brian Allen from Manistee. He is a life-long birder, who has traveled extensively (both inside and outside the country) in pursuit of his favorite pasttime. He is also one of the best speakers I have ever heard at any event during my decades of birding as well as attending festivals and bird-related conferences. I took the liberty of asking him if he would help out with your festival. He is willing to do so, and would like to have expenses and \$250.00 for participating as a field trip leader and for offering a keynote address. (I would ask him to do his Birds of Peru; it is wonderful.)

Email from Matt McDonald

I'm a bit more geographically removed than I'd prefer from this event, but I hope to be there for the festival to help lead a field trip. In the meantime, I'd be glad to help with any eBird documentation (ie birders like Donna H send me some data and I'll import into eBird), Beaver Beacon article development on eBird/birding on the island, Island birding hotspot google map development, website development. Anything I can touch digitally and remotely from here in Wisconsin.

Email from Eric Myers

I looked over my comments (I made them in pencil on a print off) and it was pretty much just saying what I thought needed to be done, list specific shelters, list places to eat, list transportation options. We need to get more specific data, the # of beds for example. You listed 50 people coming to the Island for a festival, what is the total number of hotel rooms available? How many B&B's are there on the Island? etc. How does the lodging at the Leelanau festival compare to Beaver?

We need to list the specific habitat types. I don't know if there are key words or catch phrases that are good to attract 'birders' but I have listed a few on an attachment that are on public areas. I included Pam and Brad's place I walked on a couple years ago, I don't know if they'd open it to the public for a festival.