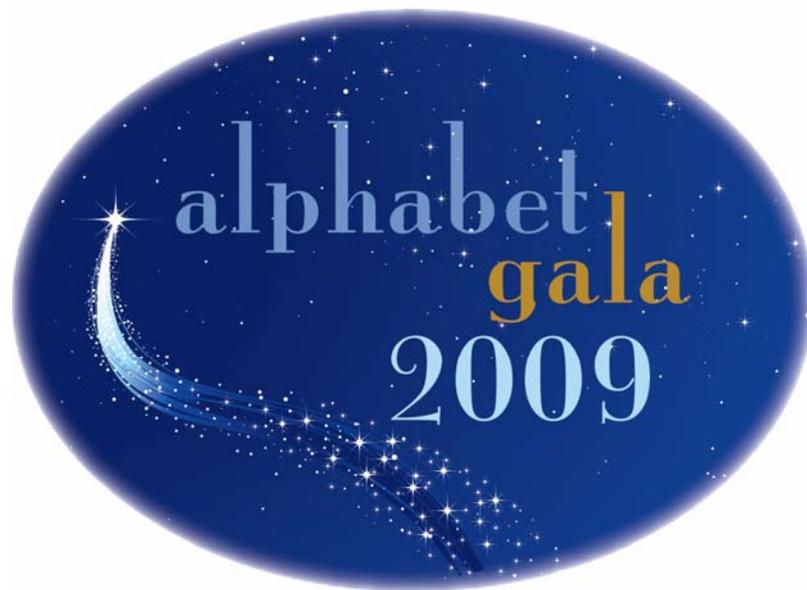

Gala Planning Kit

Version 1.0



Developed for the Children's Learning Centers by:

SCOTTISH RITE
CHARITIES



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Introduction

This kit is one of four signature event kits designed to take you through the process of planning and holding a special event. (Other kits provide materials on planning a walk, golf outing and wine tasting.) Whether you are new to the world of special events, or your board has hosted dozens of events over the years, take the time to examine this Gala Planning Kit. In this kit, we have included an event timeline, a planning guide and a committee task sheet to assist you in planning your gala.

This kit is available for download at <http://www.childrenslearningcenters.org/help/fundraising.html>. Feel free to print and distribute multiple copies to your board members. In addition, you will find support materials at the above link to accompany this kit, including templates to help you develop a budget, sponsor request letter and press release.

If you have any questions or comments about this planning kit, please contact Bridget Steele in the Development Office at 781-465-3341.

We wish you every success as you work to give children with dyslexia the chance to learn and reach their full potential.



Gala Timeline

Nine to Twelve Months Before

1. Develop a steering committee. The members of this committee will make the initial decisions about your gala and will be heading their own planning committees.
2. Determine if a gala is the best fundraiser for your Center.
3. Recruit the following volunteer leadership:
 - Event Chair
 - Print and Promotions Chair
 - Sponsor Chair
4. Choose a location for your gala.
5. Reserve a date and time.
6. Establish a budget for your event.

Six to Nine Months Before

1. Have committee leaders enlist additional volunteers and assign duties.
2. Select a caterer.
3. Decide on any other fundraisers you would like to accompany the gala. (silent auction, raffle, etc.)
4. Choose a theme.
5. Select and book entertainment.
6. Set ticket prices based on your fundraising goal. Be realistic for your community.
7. Develop sponsorship packages for your event. Potential sponsor opportunities include:
 - Event sponsor
 - Table sponsors
 - Advertising in the event program
8. Compile a list of potential event sponsors and begin soliciting them.

Four to Six Months Before

1. Choose the food and beverage menu for your event and decide on a meal style.
2. Evaluate venue floor plans and determine set up.
3. Compile a list of possible attendees.
4. Design and personalize save the date cards.
5. Determine how you will process event registration.
6. Confirm equipment provided by venue and determine any need for supplemental rentals.
7. Develop a publicity strategy.
8. Plan decorations.
9. Research gift ideas and place order.
10. Book any additional vendors needed.

Three Months Before

1. Confirm travel arrangements for entertainment if applicable.
2. Obtain addresses of attendees and mail save the date cards.
3. Secure audio-visual equipment for your event. Determine if your location already has a system in place or if you will need to rent your own.
4. Recruit a master of ceremonies to make announcements and presentations at the event.

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5. Finalize menu.
6. Contract all vendors and make deposits.
7. Evaluate secured sponsors to date and re-assign sponsor recruitment responsibilities to volunteers.
8. Send out press releases and community announcements.
9. Develop design and draft of event program book.
10. Finalize décor and floor plans.

Six to Eight Weeks Before

1. Personalize and mail invitations. Be sure to include acceptable attire on the invitation.
2. Develop event night schedule.
3. Gather all sponsor logos and names for program ads and insert into program book.

One Month Before

1. Finalize event night schedule.
2. Complete and edit the program book.
3. Follow up on any guests who have not replied.
4. Confirm arrival of all guest gifts.

Two Weeks Before

1. Print program books.
2. Develop seating charts.
3. Get final number of guests to caterer.
4. Package guest gifts if necessary.
5. Review remarks with master of ceremonies.

One Week Before

1. Finalize seating charts.
2. Confirm vendors' arrival times.
3. Review volunteers' arrival times and event day tasks
4. Hold event rehearsal if necessary.
5. Prepare remaining vendor payments.

Day of the Event

1. Arrive before all vendors to set up and decorate.
2. Confirm that all volunteers are in attendance.
3. Ensure that check-in table is ready and staffed.

Immediately After

1. Clean up.
2. Return all rented and borrowed equipment.

Within a Few Weeks

1. Write and send personal thank you notes.
2. Evaluate the event to prepare for next year.



Gala Planning Guide

The following guide is by no means all-inclusive, but it is designed to assist you in planning your gala. Every Learning Center, community and event is different. Please adapt this guide to fit your needs.

Getting Started

The first step in planning your gala is to develop a steering committee. This committee should include four to six core Learning Center supporters who have experience in event planning or are well connected in the community. The steering committee will be responsible for selecting committee leaders and making the initial decisions about your gala.

Before jumping into planning a gala, your steering committee should evaluate your community and donor base to determine if a gala would be a worthwhile fundraiser for your Center. A gala is most profitable in a community where people are used to attending up-scale events and are willing to spend money on a high-priced ticket. Unless you are able to get several sponsors to offset event costs, most of the money raised from a gala will come from ticket prices and event program advertising.

Recruiting Leadership and Volunteers

Once the steering committee has decided to move forward with a gala, the members should begin choosing people to oversee certain aspects of the event. Depending on the size of your volunteer base, you may want to structure your event committees differently than what is outlined. Below are the job descriptions of potential leaders for planning committees.

Event Chair

The event chair is the person responsible for overseeing the entire event. Holding this position is an honor, and the event chair should be someone who knows the key players in your community and who has experience in planning special events. A few duties of the event chair include selecting the food and beverage menu, booking entertainment, choosing a theme, overseeing decorations and handling registration.

Print and Promotions Chair

The print and promotions chair will oversee getting communication out about the event and taking care of all printed material, including invitations and the event program.

Sponsor Chair

The sponsor chair should be well-connected in the community and will be responsible for getting local businesses and donors to sponsor the event by advertising in the event program.

Once these leaders have been chosen, they should begin recruiting additional volunteers to fill their committees. Potential volunteers include Masons in your region, co-workers, parents of Learning Center students, supporters and suppliers. Commit the same energy to recruiting

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volunteers as you do to getting sponsors. Look for volunteers with specific talents, and assign them tasks that they can use their talents to accomplish.

Check with your Center Director to get the names of Center parents who might be interested in volunteering.

Don't forget to involve Learning Center families in your fundraiser. Parents with children enrolled at the Center have a higher likelihood of being employed by people who might be interested in advertising in your program. They also will know the program intimately and will be able to present a compelling case when soliciting sponsors.

The event chair should hold regular meetings with committee leaders. Create a schedule for committee meetings, and be sure to prepare agendas to go over at each meeting to keep them productive. Volunteers will meet less frequently in the first few months of planning and more frequently until a few days before the event, when committees will meet as frequently as daily.

Choosing a Location

Start looking at venues to hold your event as early as possible. If your gala is scheduled at a popular time, some sites could be booked a year in advance. Never reserve a venue without touring it first, even if a committee member recommends it. Choose a location that will be able to accommodate all of your guests comfortably.

Thoroughly examine everything that is offered, and don't just go with the lowest bidder. Some venues may have their own caterer or provide their own tables, decorations and audiovisual equipment. Don't forget to look at the venue's payment schedule. If you will need to put down a deposit first, be sure you have the money available for it up front.

Consider your community and the guests who will be attending your event. If your community and participants are wealthy, choosing a more exclusive location will attract more people. In an area with few major donors and less giving potential, choosing an expensive location and charging high ticket prices could make it difficult to recruit attendees.

Choosing a Date

Determine what day of the week would work best for your event. Would enough guests be able to attend if your event was held on a weeknight, or would a weekend work best?

Be sure to look at your community calendar before choosing a date to prevent scheduling your gala on the same day as a major community event. Avoid religious holidays and other potential conflicts.

Creating a Budget

A budget template is available at <http://www.childrenslearningcenters.org/help/fundraising.html> to help you keep track of your expenses and proceeds. Download the template and keep track of the expenses electronically as they incur. The template has been created to

automatically calculate total costs and includes places to add additional expenses you may incur. If you prefer to keep track of your expenses manually, download the printable budget sheet, print the sheet and fill in your expenses by hand.

Rule out venues and services that fall outside of your budget. Expenses can accumulate quickly in planning events, and if something is already outside of the budget, don't waste your time considering it.

After you have created a budget for your event, determine how much you will charge for tickets. Factor in the cost of the venue, catering services, meal, decorations, entertainment, and printing and publicity expenses. Keep in mind that your ticket cost should be based on the economic level of your community.

Setting Fundraising Goals

Ticket proceeds will only make up a portion of your gala's revenue. Set goals for how much you hope to raise through event program advertising and any additional money makers you have planned, such as a raffle or silent auction. Combining your gala with an additional fundraising event can maximize your guests' enjoyment and your profits. Often people are more willing to give to a few different things than to write one large check.



Check out the **Silent Auction Supplement** to learn how to plan an accompanying fundraiser to your gala.

Choosing a Theme and Format

Theme and Decorations

When choosing the theme for your gala, try to come up with something unique that people will remember. Check with your caterer and venue to determine how much freedom you will have in incorporating your theme into the decorations and room. Be sure to inquire whether your venue provides items such as tables, chairs, silverware and linens, or if you will be responsible for them.

Event Format

After you have agreed on a theme and chosen a decorating scheme, plan the format and schedule for your gala. How long will you allow for cocktails? Will the entertainment or program take place during dinner or after? Use the event as an opportunity to re-state and present your mission in a compelling and effective way. Schedule time in your program to thank donors and volunteers.

Booking Entertainment

A gala should include some type of entertainment incorporated into the night's events. Some possible entertainment options include a band for dancing, a speaker, a musical performance or a video presentation. Check with committee members to see if any of them have a connection with a lecturer, celebrity, comedian, performer or musical group that would be willing to speak or perform for free or for a discount. Keep in mind that your entertainment doesn't have to be

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someone who is nationally known. A popular local group or public figure could still draw crowds in your community.

Consider using part of the night to highlight some of your student's accomplishments.

The entertainment portion of your event could also be tied into your Center's mission and work. Consider using the time to highlight some of your students' accomplishments. Have parents of students, or the students themselves, tell your guests how the Center has helped them. You may also consider showing an audiovisual presentation on the Center's work.

Don't forget to recruit a master of ceremonies to make announcements and introduce participants. Check with your venue to see if they already have a sound system, and test it well before the event. If you are responsible for providing your own system, invest in renting a good one. Guests may not recognize a higher end system, but they will remember a bad one. Make sure your system works and works well.

Creating Sponsor Packages

Sponsor packages will vary widely depending on your community and its economy. A price for a title sponsor in an affluent community would not be appropriate for other areas. Make your packages something that local businesses and donors would be interested in having. Offer lots of exposure, especially for the higher sponsor levels. Develop a compelling way to present your Center's mission and need in both print and spoken form.

Establishing Your Menu

Choose a caterer to handle the meal portion of your event. Look at reputation and quality when you are making this decision, and don't just settle for someone connected with your Center who isn't established. If the venue where you are holding your event has staff on hand to serve meals, ask them to provide in writing exactly what services they offer.

Work with your caterer to determine what your meal will be and how it will be served. Guests willing to pay a high price to attend your gala will expect a quality meal. A buffet style dinner is less expensive than a served meal, but also less formal. Make your menu choices based on your ticket price and your community. Keep in mind that you often can significantly increase the quality of food you offer for just a few dollars more per person, so consider investing in a nice meal. A good meal will be something your participants will remember and will increase their chances of attending next year's event. On the flipside, guests also will remember a bad meal for years to come.

When selecting your menu, you also will have to decide what beverage services you will provide. An open bar could eat up a large percentage of your menu budget, but it would also allow you to charge higher ticket prices. Check to see if your venue charges by the drink or by the bottle and if they charge a corkage fee for serving donated wine. Keep in mind that food costs are often negotiable, so assign the task of choosing the menu to someone who isn't afraid to negotiate.

Developing a Publicity Strategy

Take advantage of every opportunity available to your community to publicize your event. Notes in company newsletters and local newspapers and announcements at organizations your committee members are involved with can help to spread the word and recruit additional guests.

Another good way to increase your chances of publicity is to seek an honorary event chairperson to attend the event and make announcements at the program portion of the night. Look for someone who is locally famous, like a sports or media figure.

Selling Sponsorships

The three revenue sources for your event are ticket sales, ancillary fundraisers and selling sponsorships. Program advertising will be your gala's main revenue source. When looking for local businesses and supporters to purchase advertisements, nothing beats a face-to-face request for support. Use your community contacts and approach businesses that are familiar with your Center or with members of your committees. Begin by putting together a list of potential sponsors and assigning committee members to approach a certain number of potential sponsors to advertise in your program. Parents of students at your Center will be especially valuable in soliciting sponsors since they will be able to tell compelling, personal stories about the way your Center has touched their children and families.

Event Sponsor

If you can find one, a primary event sponsor should have its name accompany the event name. Pricing to obtain this distinction will vary, but the donation should usually be in the magnitude of five times or more the cost of a table sponsorship. The event sponsor should get heightened visibility at the event and prime seating.

Table Sponsors

Solicit local businesses and supporters to see if they would be interested in purchasing a table's worth of tickets. Usually the price per ticket for table sponsors is slightly lower than the single ticket price (75-90%). You could also charge 100% of the seating price, but include additional incentives such as an ad in the program. Be sure to incorporate a way to display the names and logos, if applicable, of the table sponsors in the center of their tables.

Nothing beats a face-to-face request for support.

Program Book

Start by choosing a size for your program book. Typical sizes are 8½ x11 or 8½x5½. The size of your book will determine how many ads will fit on a page.

The following are a few examples of the different levels of advertising you can offer in your program book.

- **Friends:** For a cash gift, these supporters would have their names included on a list on a page but will receive no additional benefits. The donation to be included in this group could vary, but don't set it any lower than \$25.

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- Business Card Ad: For a cash gift, these supporters would have a business card size ad (1/8 of a page for a smaller sized book, 1/16 of a page for the larger size) but will receive no additional benefits.
- Additional Ads: These could include Quarter Page, Half Page, Full Page, Inside Covers and the Back Cover.

Price advertising accordingly, and decide if you would prefer to include tickets with advertising. Price tickets lower than face value if they are accompanied with an ad purchase.

A letter template is available for download at <http://www.childrenslearningcenters.org/help/fundraising.html> to help you put together sponsor request letters, but the letter should be used as a last resort or as a formality if someone has already made a verbal commitment to make a donation to your event. Don't blindly send out letters until you have used up all of your community contacts.

Recruiting Guests



Each of your volunteers should be responsible for recruiting a set number of guests.

Begin by setting a goal of how many people you would like to have at your event. Check with your caterer to see if there are different pricing levels based on the number of attendees, and set your goal accordingly. Think about who you are trying to get to attend your event. While current supporters are always a good place to start, look for prominent people in your community who may not be familiar with your Center and its work.

Consider having each committee member be responsible for recruiting a set number of guests, or one table of guests. Don't forget to factor in the tables and seats included in your sponsor packages.

Potential attendees include:

- parents of current and former students
- members of local Valley(s)
- members of other local Masonic bodies
- friends, family or co-workers of committee members
- local small business owners
- Learning Center and Masonic vendors

Start with sending out save-the-date cards approximately three to five months before the event. Follow by sending invitations approximately six weeks before the event. Consider including a registration deadline to prevent last-minute additions.

Event Logistics

Registration

Set up a system of obtaining and processing registration funds, and assign two people to oversee the money coming in to assure accuracy of the accounting. Check with your committee members to see if any of them are able to process credit card transactions.

Photographer

If the size and budget of your event merits it, consider hiring a photographer to take pictures of the guests and entertainment at your event. The photos could be used in newsletters and posted on your website after the event, and they could also be used to publicize next year's event. If you do choose to have pictures taken at your event, make sure you recruit someone with experience to handle the task.

Insurable Liability

Most organizations have general liability insurance, but you should still contact the organization you are contracting to determine if your event produces any additional liability issues.

Gifts

Decide among your committees if you will be giving gifts to the guests who attend your event. A personalized item with your gala logo and date will remind guests of your event long after they leave.

Seating Charts

Once you have the final guest list, assign committee members to assemble seating charts for the night. Inform the volunteers in charge of this task of any special seating preferences, and make sure they understand the hierarchical structure of the Masons and are able to seat guests accordingly. In addition to planning seating charts, be sure to develop a way for guests to identify their tables, such as a number incorporated into the centerpiece.

Event Day Tasks

Make sure you arrive early enough on the day of the event to have everything set up and decorated before your vendors arrive. Have a system in place to confirm that all volunteers have arrived. Set up the registration table in a highly visible area, and allow plenty of room to avoid congestion. Be sure to have the area marked well with a prominent sign, and double check to make sure the table is set up and staffed properly.

Post-Event Wrap Up

Thank You Notes

Within the few weeks following your event, send personal thank you notes to your volunteers and sponsors. Showing appreciation to your contributors will increase the chances that they will be a part of your event next year, and overlooking them is a sure way to keep them from helping with future events.

Planning for Next Year

Don't close the books on your gala before evaluating its successes and failures. Hold a meeting with committee chairs to find what strategies worked best and how you could improve the event in the future. Consider sending event evaluation forms via email to individual committee members to round out the evaluation process.



Gala Committee Task Sheet

Event Committee

- Select venue.
- Select caterer.
- Select food and beverage menu.
- Choose a theme.
- Plan and oversee decorations.
- Book entertainment.
- Handle entertainment's travel arrangements.
- Secure audio-visual equipment.
- Develop and implement a way to process guest registration.
- Develop an event night schedule.
- Revise and finalize the schedule.
- Create and finalize seating charts.
- Confirm committee members' event day tasks, time of arrival, etc.
- Oversee venue, caterer, entertainment and other vendors' payment.
- Return all rented and borrowed equipment and decorations.
- Confirm that post-event acknowledgements have been sent.
- Review event for successes and failures and document them for next year's event.

Print and Promotions Committee

- Develop a publicity strategy.
- Obtain guest addresses.
- Design, personalize, print and mail save the date cards.
- Design, personalize, print and mail invitations.
- Obtain potential sponsor addresses from sponsor committee.
- Personalize, print and mail sponsor request letters.
- Create and submit press releases to local newspapers.
- Submit any other announcements to community publications for event publicity.
- Design program book.
- Obtain and organize ads in program book.
- Edit and review program book for spelling, grammar and content.
- Print program books.
- Print and mail post-event sponsor and donor acknowledgements.

Sponsor Committee

- Develop a list of potential sponsors.
- Secure an event sponsor.
- Secure table sponsors.
- Solicit for program advertising.
- Acquire business logos and correct names and wording for program ads.
- Submit ad copy for program book to print and promotions committee.
- Maintain list of sponsors and donors for post-event thank you letters.



Additional Support Materials

The support materials outlined below are available for download at <http://www.childrenslearningcenters.org/help/fundraising.html> to assist you in planning your gala.

Budget Template & Sheet

The Budget Template is designed for you to maintain on your computer. Because it is created in template form, the document will open as a new untitled document. As you enter anticipated and actual expenses, the sheet will automatically calculate your total expenses.

Don't forget to re-name and save the document to your computer once you have opened it. If it is easier for you to keep track of your expenses manually instead of on the computer, use the Printable Budget Sheet. Simply print out the sheet and write in your expenses as they accrue. Both budget sheets should be adapted to fit your needs.

Sponsor Request Letter Template

The Sponsor Request Letter Template is designed to assist you in drafting a letter to local businesses and individuals in your community requesting support for your gala. The words in red indicate text that needs to be changed to reflect your event and Learning Center. When sending out the letter, be sure to include a sheet reflecting the different donor levels you have developed along with the benefits for each level.

Press Release Template

The Press Release Template should be used to alert your community of your upcoming gala. The release should be sent to newspapers and other publications several weeks before your event date. Like the previous template, the release contains words in red that need to be personalized for your Center. Adapt the template to fit your needs and don't forget to change the red text to black.

Alphabet Gala Logo

The logo used throughout this document was designed out of the Lexington office and is available for you to use in publicizing your gala. Use the picture file on invitations, signs, banners, program books or wherever you choose.