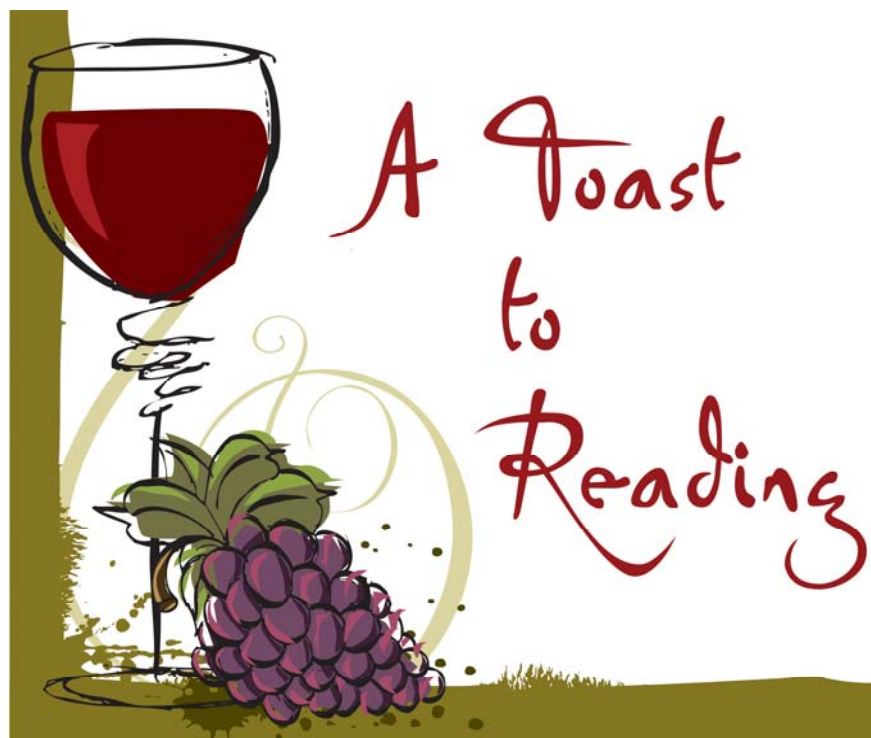

Wine Tasting Planning Kit

Version 1.0



Developed for the Children's Learning Centers by: **SCOTTISH RITE**
CHARITIES

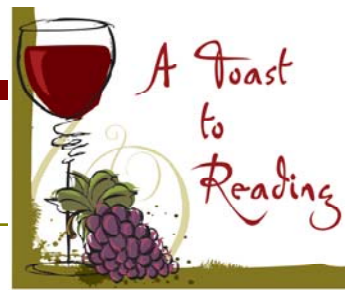
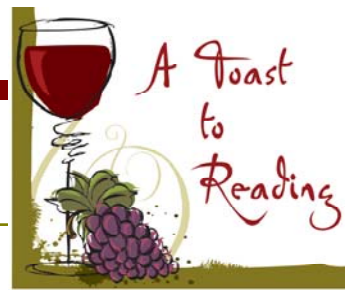


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Introduction

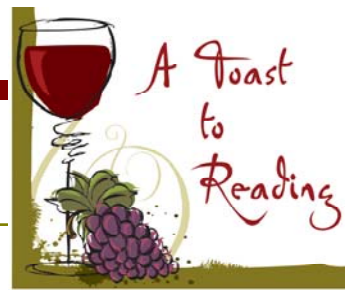
This kit is one of four signature event kits designed to take you through the process of planning and holding a special event. (Other kits include a walk, golf outing and gala planner.) Whether you are new to the world of special events, or your board has hosted dozens of events over the years, take the time to examine this Wine Tasting 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 tasting.

Keep in mind that you don't need to have a large group of wine connoisseurs to hold a successful wine tasting. A tasting is entirely scalable and can be a low-key event or an extravagant affair depending on how ambitious your planning committee is. A wine tasting may be an ideal event for your Center if you are looking for an event with minimal planning time. It also requires the lowest investment and the lowest risk of the four events we have outlined for you. If you have never taken on a large fundraising event before, planning a wine tasting can help your board build the confidence they'll need to throw a larger event in the future.

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, donor 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.



Wine Tasting Timeline

Four to Six Months Before

1. Develop a steering committee. Duties of the steering committee include:
 - Deciding if a wine tasting is a good fundraiser for your Learning Center
 - Determining how much money you want to raise
2. Recruit the following volunteer leadership:
 - Event Chair
 - Print and Promotions Chair
 - Sponsor Chair
3. Choose a location for your wine tasting.
4. Reserve a date and time.
5. Have committee chairs enlist additional volunteers for their committees and assign duties.
6. Establish a budget for your event.
7. Set ticket prices based on your fundraising goal. Be realistic for your community.
8. Choose a theme for your tasting.
9. Decide on any additional fundraisers you would like to accompany your tasting (silent auction, raffle, etc.)
10. Develop a list of potential food and wine donors and begin soliciting them.

Three Months Before

1. Secure necessary equipment, including tables, chairs, linens, etc. that are not provided by your venue.
2. Evaluate current donors secured and re-assign donor recruitment duties to volunteers.
3. Develop a publicity strategy.
4. Decide on event floor plan.
4. Select and book entertainment if you choose to have it.
5. Decide on an event registration method.
6. Compile a list of potential guests.
7. Develop and mail save the date cards, if you choose to use them.
8. Order complimentary wine glasses if you choose to have them.

Six to Eight Weeks Before

1. Finalize wine and food vendor commitments.
2. Confirm winery representatives and additional wine servers.
3. Develop and mail invitations.
4. Secure all event decorations.
5. Send out press releases and community announcements.

One Month Before

1. Finalize décor and floor plans.
2. Follow up on any guests who have not replied.
3. Confirm which volunteers will be present on event day.

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Two Weeks Before

1. Confirm vendor and servers' arrival times.
2. Prepare remaining vendor payments.

One Week

1. Confirm final number of participants.
2. Review volunteers' event day tasks, arrival times, etc.
3. Double check status of all wine and food donations and purchases.

Day of the Event

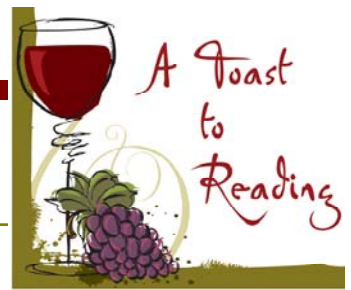
1. Arrive before all vendors to set up and decorate.
2. Confirm that all volunteers are in attendance.
3. Ensure that check-in table is ready and staffed.
4. Keep track of guests and make sure that no one gets out of hand.

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.



Wine Tasting Guide

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

Getting Started

The first step in planning your wine tasting 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 wine tasting.

Before jumping into planning a wine tasting, your steering committee should evaluate your community and donor base to determine if a wine tasting would be a worthwhile fundraiser for your Center. If you do not have any additional fundraising opportunities at your tasting, the money you raise will come entirely from ticket prices, and thus will be most profitable in a community where a large group of people would be interested in attending.

Recruiting Leadership and Volunteers

Once the steering committee has decided to move forward with a wine tasting, 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. Ideally, the event chair should be someone who has connections with wineries and liquor suppliers in your community and who has experience in planning special events. A few duties of the event chair include selecting the food and wine that will be served, booking entertainment, choosing a theme, overseeing decorations and handling registration.

Print and Promotions Chair

The print and promotions chair will be responsible for getting communication out about the event and taking care of all printed material, including invitations, signs and banners.

Sponsor Chair

The sponsor chair should have contacts with wineries, restaurants and food suppliers in your community. This person will be responsible for getting local businesses to donate food and wine to the tasting and solicit additional sponsors for your event.

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 volunteers as you do to getting sponsors. Look for volunteers with specific talents, and assign

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them tasks that they can use their talents to accomplish.

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 sponsoring or donating to your event. 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 at as early as possible. If your wine tasting is scheduled at a popular time, some sites could be booked several months in advance. Never reserve a venue without touring it first, even if a committee member recommends it.

When selecting a location for your wine tasting, the most important thing to consider is space. Make sure you find a venue with plenty of room for guests to move around, and allow enough room around the wine tables to avoid congestion. If you have decided to hold an additional fundraiser along with your wine tasting, be sure your venue is large enough to accompany both.

Thoroughly examine everything that is offered, and don't just go with the lowest bidder. Some venues may have their own tables, chairs and linens, while others may require you to provide your own. 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.

Choosing a Date and Time

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 event on the same day as a major community event. Avoid religious holidays and other potential conflicts.

Wine tastings are usually held at night. Because you will not be serving a full meal at your tasting, choose a time that will allow your guests to have dinner before or after the event.

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, food and wine 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, wine and food, set-up, servers, decorations, entertainment, and printing and publicity expenses. Keep in mind that you should set your ticket cost based on the economic level of your community and the quality of wine and food you plan to serve.

Setting Fundraising Goals

Ticket proceeds will be the main source of revenue for your wine tasting. To increase your profits, consider combining your tasting with an additional fundraising event such as a silent auction or raffle. The addition will maximize your guests' enjoyment, and 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 wine tasting.*

Choosing a Format

Theme and Decorations

Evaluate your potential guests when choosing a theme for your wine tasting. If your guests have high expectations and ticket prices are expensive, a bold theme will bring excitement and validity to your event. While a themed event is entirely optional, keep in mind that there are a variety of creative ways to make your event more interesting without making it more expensive. Also, having a distinct theme will give your event a longer lifespan, allowing you to make each year's event a new experience for guests with a different theme. Consider the following themes:

- **Vertical Tasting:** features one varietal of the same producer of wine from several different vintages (years).
- **Horizontal Tasting:** features wines from several different producers that are the same type and vintage; this theme has several different variations, such as focusing on different wines from the same appellation (growing area) and vintage.
- **Comparison Tasting:** comparing the same varietal from different appellations; this could mean comparing Old World and New World wines, American and European wines, etc.
- **Grape Varietal:** comparing wines from different appellations made from the same type of grape (for example, follow a grape around the world, serving wines from different countries that come from the same grape).
- **Region Based:** features different wines that come from the same appellation.

The options for themes are endless. Be creative, but make sure to check with your venue to determine how much freedom you will have in incorporating your theme into the decorations and room. Don't forget to inquire whether your venue provides items such as tables, chairs, silverware and linens, or if you will be responsible for them.

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Entertainment

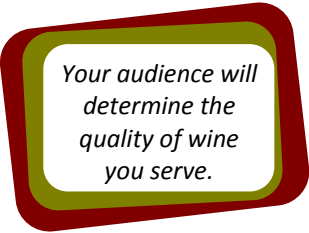
Consider booking a harpist or small group to provide chamber music at your wine tasting. The background music would add to the ambience of your event. You also may want to recruit a wine expert to describe the different kinds of wines being served and discuss what to look for in wine tasting. Keep your budget in mind and rule out entertainment if your funds don't allow it.

Selecting Wine

When selecting the wines you will serve at your tasting, consider the following:

Theme

If you have chosen to incorporate a specific theme throughout your event, choose wines that complement this theme. If it is important to your committee to hold stringently to your theme, you will need to be willing to pay for specific wines that local wine suppliers will not donate. With a tight budget, you may need to modify your theme if you are unable to get enough donations or discounts on your first choices of wine.



Your audience will determine the quality of wine you serve.

Guests

Your audience will make a difference in the wine you serve. If you plan to have a large number of wine enthusiasts attend your tasting, be more selective in the wines you choose. The number of guests will also determine the wines you select. A larger event will require a greater variety of wines, while a smaller tasting can get by with fewer kinds.

Ticket Price

The quality of wine you offer will dictate the price of tickets. A high-end event will require more unique, costly wine. Selling expensive tickets without following through with serving quality wine could turn your guests off to attending your event next year.


Pairing Food With Wine

A variety of foods complement wine. Two natural pairings with wine are cheese and chocolate. You also may consider serving hors d'oeuvres at the tasting. Before choosing what foods you will serve, examine your budget to see how extravagant you are able to be. Keep in mind guest expectations. Be sure to have bland crackers or bread for guests to clean their palates between wines.

Soliciting Food and Wine Donations

The most profitable scenario for your tasting is to have the wine and food you serve donated. When looking for local food and wine suppliers to make donations, nothing beats a face-to-face request for support. Begin by putting together a list of potential donors and assigning committee members to approach a certain number of businesses. Parents of students at your Center will be especially valuable in soliciting donors since they will be able to tell compelling, personal stories about the way your Center has touched their children and families.

A letter template is available for download at <http://www.childrenslearningcenters.org/help/fundraising.html> to help you put together donation 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.



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

When soliciting wineries for donations, ask if a representative from the business would be available to serve the wine. From a vendor's perspective, being a part of your tasting would provide him with an opportunity to sell his wine. You, in turn, would benefit from having an expert serving and discussing the wine you are featuring. If a winery isn't willing to donate, at least ask for a discounted or non-profit rate.

Developing a Publicity Strategy

Take advantage of every opportunity available in your community to publicize your event. Notes in company newsletters, local newspapers and announcements at organizations your committee members are involved with can help to spread the word and recruit additional guests. A press release template is available at <http://www.childrenslearningcenters.org/help/fundraising.html> for you to download, personalize and submit to your local newspaper.

Recruiting Guests

Begin by setting a goal of how many people you would like to have at your event. Current supporters are always a good place to start, but you also should look for prominent people in your community who may not be familiar with your Center and its work. Assign each committee member a set number of guests they are responsible for recruiting.

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 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.


Wine Tasting Planning Kit

Photographer

A wine tasting does not warrant a professional photographer, but you should have a volunteer taking pictures at your event. The photos could be used in newsletters and posted on your website after the event, and they could also be included when publicizing next year's event.

Tables and Seating

Plan to have several six-foot tables set up for the wine to be served from. The number of tables you'll need will depend on how many wines you will be offering. If you plan to have a silent auction with your tasting, factor in tables for auction items as well.



A wine tasting is more of a moving event, so you won't need seating for everyone.

You will not need to have enough chairs for everyone because a wine tasting is more of a moving event. A good rule of thumb is to allow for seating for approximately half of your guests. Consider having small, four-person tables with chairs as well as higher, café-style tables for guests to set their glasses down on and mingle.

Serving Wine

Consider giving away complimentary wine glasses featuring your event name and year for your guests to use at the tasting. The extra gesture can help make your wine tasting a more festive and memorable event. Disposable plastic cups can also be used. Keep in mind that using a single wine glass per guest as opposed to disposable cups will prevent servers from pouring several servings of wine ahead of time. Be sure to have enough servers to prevent crowding.

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 are present. Set up the registration table in a highly visible area, and allow plenty of room to avoid congestion. Mark the area well with a prominent sign, and double check to make sure the area is set up and staffed properly.

Prepare several pitchers of water for guests to rinse out their glasses and cleanse their palates between wines. Be sure to have someone responsible for refilling the water. You also will need to set up dumping buckets for guests to discard their wine. As with any alcohol-related event, keep an eye on your guests throughout your tasting and make sure no one gets out of hand.

Post-Event Wrap Up

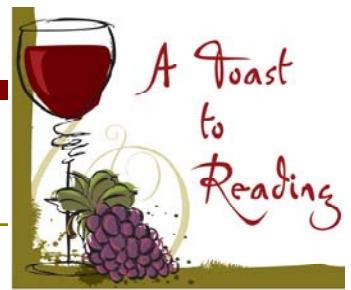
Thank You Notes

Within the few weeks following your event, send personal thank you notes to your volunteers and donors. 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 wine tasting 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.



Wine Tasting Committee Task Sheet

Event Committee

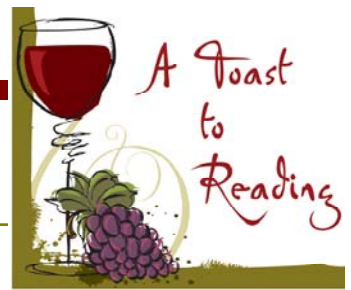
- Select venue.
- Choose a theme.
- Establish your budget.
- Set ticket prices.
- Decide on event floor plan.
- Plan and oversee decorations.
- Select and book entertainment if you choose to have it.
- Develop and implement a way to process guest registration.
- Confirm committee members' event day tasks, time of arrival, etc.
- Oversee venue, equipment rental, 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/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 donor addresses from sponsor committee.
- Personalize, print and mail donor request letters.
- Create and submit press releases to local newspapers.
- Submit any other announcements to community for event publicity.
- Print and mail post-event sponsor and donor acknowledgements.

Sponsor Committee

- Develop a list of potential wine and food donors.
- Assign donor recruitment duties to volunteers.
- Confirm final status of all wine and food donations.
- Maintain list of sponsors and donors for post-event thank you letters.



Additional Support Materials

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

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.

Donor Request Letter Template

The Donor Request Letter Template is designed to assist you in drafting a letter to local restaurants and wineries in your community requesting that they donate food and wine to your wine tasting. The words in red indicate text that needs to be changed to reflect your event and Learning Center.

Press Release Template

The Press Release Template should be used to alert your community of your upcoming wine tasting. 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.

***A Toast to Reading* Logo**

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