



Nitzotzot Min HaNer

Fundraising Dinners

Volume #19, March 2005

In this edition of Nitzotzot we aim to clarify finer points of making fundraising dinners or other special events. Events generally require a significant investment, both in terms of time and money, while at the same time carry the potential for raising significant funds, creating awareness of your mission, and making new friends for your organization. The key to a successful event always includes an accurate awareness of why you need to do this, a detailed idea of what it entails, who your target audience is, and how much you plan to raise. In this newsletter we discuss the various aspects of how to make these decisions and offer insight and ideas to make your task easier once you have made that decision.



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1. Why to Have a Dinner¹?

“From the small event to the oversized extravaganza, event planning is both an art and an exacting science where success is made or shattered in the execution of even the smallest details.”²

Many organizations, especially small organizations with little community visibility and/or a great pressing need for funds feel that the “dinner” is *the* way to go and should not be missed, even when it requires great effort and not enough funds are raised.

Organizations, both large and small, will discover that the motivation to make the event is not only raising funds abut also recognition, community awareness, building relationships, thanking people who help them all year in a public forum and others. Frequently an alternative event to a sit-down dinner will minimize costs while maximizing a specific message. This may be true even in cases where fundraising is a primary motivator.

That said, the usual purpose of a dinner is to make money, period. The good will, inspiration, awareness building and other gains of a “dinner” are worthy secondary goals to an event that raises significant money and/or brings new and generous³ people to the organization. If a given event fails to raise enough money, these secondary goals may become but justifications to whitewash failure, and prevent the organization from learning from past mistakes, whose lesson include the sometimes painful or radical decision to quit the “dinner” scene.

There are organizations with very respectable budgets that do not make a dinner at all. The Heritage House made but one dinner for the first twenty four years of its existence. It then made four annual dinners, with market-standard results and decided to stop again.

Except for the honorees, people generally do not give as much to a dinner as they give in a one on one solicitation. So, ideally, a “dinner” would aim to involve mainly new people. (How to get those people, we discuss below under 3 & 4). However, in practice, it is difficult, almost insulting, to have a “dinner” without inviting good friends of the organization. Usual donors will be happy to buy a ticket, take out an ad, and will be “easy targets” but will then often feel they have given their donation for the year. Thus the organization has thereby shot itself in the foot.

On the other hand, a dinner is a mobilizing event. It forces the organization into a time-table, and it forces busy kiruv workers to give time to their fundraising. Many kiruv professionals are just too busy to give continuous and steady attention to their fundraising. The dinner works better for them.

¹ Often, we will use the word “dinner” when we mean to say any special event. Other times, we will indicate specifics as each individual type of event carries different advice or relevant comments.

² Clare Sullivan, CEO, Sullivan Group - www.sullivan-group.com

³ With their time, expertise and/or their money



However, a dinner can usually only be the main source of income for a small or medium size organization, organizations with a \$500,000 budget or less. The larger the organization, the larger and more successful the dinner may be. However it will also be a lower percentage of the total budget.

Evaluating whether you should make a dinner is a function of a complex set of variables. How large are your overheads going to be? How much are you going to have to do yourself and how much can you delegate? Do you have guests of honor, and if so how dedicated and available will they be? Are they going to bring in new people? Finally, what is your personal and organizational style? What works for you?

Always make sure the event is important enough to your organization to merit the time and expense needed to properly stage, publicize and evaluate the event.

2. Alternative Events to a Dinner

Even if you do make an annual dinner, it may be wise to vary the nature of the event from year to year. People get bored with the same formula year in and year out. Regardless of the type of event you choose, it is critical to ensure that the purpose of the event is important, compelling or interesting enough to garner enough interest and to generate attendance. Understand the objective before planning your event. A successful event for a few key people is more valuable than a lavish affair for 1,200 which is just blah.⁴ In addition, one should always strive for each event to be a *signature event*⁵. A signature event is one which defines the organization. Attendees should walk away from the event not only feeling that they now know what the organization does, but that they also understand the flavor of the organization. They must feel the organization from the inside, not as outsiders who were privy to a mere peep. Below are examples of some "events with a difference" that broke the mold of a traditional dinner.

- An Aish HaTorah donor who was too bashful to accept the honor and responsibility of becoming an honoree at their dinner, was instead interested in hosting a lecture series at his home, inviting his close friends and covering the costs. This offered Aish HaTorah the opportunity to strengthen their relationship and image with this individual while at the same time cultivating close relationships and "selling" their cause to other potentially large donors at absolutely no cost!
- *Intimate Evenings*: In addition to their usual gala dinner, Beth Medrash Gevoha hosted intimate evenings for their biggest potential givers: at one, former President Clinton spoke, at the other a former movie star who was Chozar B'Teshuva spoke. Both events started in the early evening hours, after people were back from work and were private, by invitation only events, at a beautiful home with light refreshments. Obviously each event appealed to a different set of supporters, and both did not focus on the goals of the

⁴ Clare Sullivan, CEO, Sullivan Group - www.sullivan-group.com

⁵ Rabbi Nachum Stillerman



organization. None-the-less, each offered a special (and thus impelling) reason for these people to get out and join the organization for the evening, offering BMG the opportunity to create relationships and fundraise for their cause.

- *One-Time Dinners:* A one-time dinner can be made around a special event. A special event can be an annual or bi-annual event or can be focused on a specific, one-time purpose such as a groundbreaking, grand opening, a specific new need (such as raising funds for a new program for autistic children within your special needs school) the 20th anniversary of the organization, etc.⁶
- *Missions:* "One Family"⁷ has found that creating a "mission" of victims is very rewarding. A group or individual victims will visit the homes or shuls of a friend or supporter who will bring a group of their friends or colleagues to hear the victim's story. After a short, first hand and very moving speech where the victim will describe what happened to them, the personal suffering and travails they have experienced and often how the organization has made a difference in their lives, a friend, supporter or staff member of the organization will give a short presentation on the organization in general and the work it has been doing, sometimes showing a short video presentation that was developed for this purpose. These events have raised significant funds. Shul and large donors are encouraged to adopt a family or specific activity of the organization, adopt a project they will run going forward to raise additional funds or awareness and/or host a similar event with their friends. This format has cultivated many real friends for the organization who do give at other opportunities, who are motivated to work on behalf of the organization and who have created (and maintain) a close relationship with the victim(s).
- An interesting variation on the sit-down dinner is the "Dynamite Dinner"⁸. In this type of dinner the waiters or entertainers are the big-name attendees. For example your organization can convince 10 top local CEOs to treat their employees to dinner on behalf of your organization. Each CEO "buys" a table or more – selling seats to business associates, employees or friends or paying for it himself and hosting those he invites. More than the funds raised by selling each table, each "waiter" then serves his guests working for "tips". (Professional waiters bring food from the kitchen to an area near the table where the CEO "waiters" serve the guests.) Guests purchase funny money tips to give their waiter during the meal for good service, the waiters can do extras to earn more – such as removing silverware and requiring payment for it, auctioning items or services (lunch with the CEO next Tuesday, etc.) and you can run a competition between tables (earning more money for the organization). This type of dinner can generate a lot of interest, and depending on the draw and ambience, can raise significant funds for your organization. Many alternate themes can be used and you can certainly expand on the various aspects requiring tables to create and auction a center piece – your

⁶ When you focus an event on a specific one-time happening, it is often easier to concentrate on raising funds for that specific event as well as for the organization in general.

⁷ An organization that helps and supports victims of terror in Israel

⁸ How to Produce Fabulous Fundraising Events by Betty Stallings and Donna McMillion



organization (or students) creating centerpieces for auction, allowing for on-the-spot “celebrity” pictures for sale etc. etc. (Variations can be Dinner with the Doctors, Soup with the Symphony, Tea with the Teachers, Beef with the Band, etc. etc.)

- *The Non-Event:* Another interesting version of the dinner is the “non-event”. Here guests receive an invitation to an event that will NOT take place. Guests receive cleverly presented invitations and are requested to contribute the costs they might have incurred to be at the event (babysitters, new suit, parking, whatever). Some include a menu listing items ranging from an extravagant meal to hot dogs and chips and prices. The non-attendee chooses his level of eating (giving) and sends in his checks.
- *The Series:* Sometimes an organization can benefit most from series: such as a lecture series, a reading club, dessert happenings etc. These smaller happenings offer a more intimate environment where it will be easier to start lasting relationships with high-worth individuals (fame/funds/helpful). They also carry significantly lower overheads and allow for more flexible scheduling. A dinner is certainly not the best way to make ten new relationships or attract ten new big givers.

A strong supporter of your cause can host the initial meeting at his home, covering the costs and inviting a circle of his personal friends who can be encouraged and inspired to host the others. While major funds may not be raised on a regular basis, your organization is definitely in the position to build strong and lasting relationships with the attendees – who will have been hand-picked people with an interest in your organization and an ability to help by your mutual friend – which you can later build on to develop new primary donors for your organization. The costs of such events are minimal – perhaps the host will cover costs and will do the inviting – saving you time. Regardless, the costs are miniscule compared with a large event

Other ideas could include: a dessert series where a supporter of your organization hosts his friends for dessert at his home with a staff member of the organization giving a short lecture and where each member of the invited group hosts dessert on the same night of a following week. Each participant is happy to spend a short amount of time once a week in the company of their friends, is inspired by and learns about the organization first hand in an intimate setting that allows for discussion or questions (and certainly relationship building), costs are minimal and the supporter or organization can request a specific donation for participation.

- *A Recital:* Depending on the type of organization you run this may be appropriate. The women’s auxiliary or even children in a special music course at your school could be invited to perform for a small group of friends in a home or small reception setting. Again, costs are minimal, the group hand-picked for interest.
- *A Concert:* Many organizations like a concert as a fundraising idea, as it has a huge pull. The problems with concerts are that they are usually very expensive, they take a huge amount of organization, and they cater more



strongly to the younger set (who have considerably less funds to donate). However, many organizations have successfully held fundraising concerts. Often to do a successful concert you can try to get sponsors, donated services, sell special, signed CDs, sell very expensive VIP seats and hold a VIP reception before or after the event.

- *An auction:* With an auction, a good expectation is to expect to receive about half the dollar amount of value for each silent auction item. Certain items will fare better than others in your community, so concentrate your efforts on obtaining those items that frequently are sold at or above value.⁹ It seems that 400 items in a silent auction¹⁰ and about 40 for a live auction is the right balance for a crowd of about 230 people. Because a live auction has potential to raise large amounts of money on the night of the event, it may be worthwhile to invest in hiring a professional auctioneer.¹¹ With an auction, it is often possible to get items donated by local businesses and vendors (a tax deductible for them as well) and thereby making any sale profit for your organization. Furthermore, often artwork made by your students, special kids and seniors can be auctioned as well. Parents of your student body can be asked to donate unused items they may not need. In addition you can get sponsorships – these are donors who give larger sums for “sponsorship”. They have the right to great seats, putting their logo on some materials, etc. Interestingly, often people who sponsor such an event will also tend to bid generously at the auction itself.

3. When, Where and How?

When?

Deciding on an appropriate date for your event is a major factor in the success of your event¹² (it will also influence the exact type of event you will have: no one wants to visit the zoo in the dead of winter...) Ensure that there is no other competing event in your area that day/night (or even on the night before or afterwards, if possible, people are unlikely to go to both) or that it is not taking place in an exceptionally busy time of year (the night before every youngster in your community heads off to summer camp is a definite no-no for most of their parents..) as is PTA night, Election day, etc.

The early winter lull after Succos and June at the end of the school year are an informal “dinner season” in Jewish circles. The merits of conforming to this expected season is that people have come to expect to be participating at this time, are relatively free and possibly bored and available for the opportunity for social

⁹ Often there are hot items in your community, restaurant certificates and handcrafted items.

¹⁰ A silent auction is when items are displayed on tables and are divided into value categories. Next to each item is a box. Participants buy tickets for whatever value groups they want and put them in the boxes of the items they want. Towards the end of the evening, raffles are drawn from the tickets next to each item and the winner receives the item. (It is called ‘silent’ because there is no actual auctioneer.)

¹¹ Professional Auctioneers can charge from \$500 to \$900 and up for the evening – but should be checked locally as prices vary.

¹² Some organizations will ensure their dinner falls within a given tax year for tax purposes.



interaction your event offers. However, depending on your location, your donors may be under pressure to be present at more than one function in a short amount of time, forcing them to choose – possibly to your loss.

What time to start? It is important to consider the type of event, venue and distance from most of your participants when deciding what time to start. Consider if people will need to go home to change or to pick up a spouse. Will many participants come – and need to get back home – out of town?

Where?

The perfect location will go a long way to making your event a big success. It has the potential to enhance the ambiance and make it memorable. If it is a unique location it will not need decoration or fancy table settings (though possibly more expensive, saving you funds in other areas of the budget). Selecting a good location largely depends on the size of the crowd you expect and your image. The Yeshiva you run should not have their event at the local Pub, but a beautiful garden, or a particular outstanding architectural structure or content appropriate museum, may be a good venue for a medium size affair. Aish HaTorah held one of their recent events at a Parrot Jungle. People came and had a lot of fun. Certainly a memorable event. There is no limit to the possibilities (such as restaurants, hotels – of course, historic houses, local mansions, parks, etc.). Perhaps you can host your event in your own building or venue offering participants to get a first hand feel of your operation (perhaps offering a tour of especially decorated classrooms etc.).¹³

Regardless of whether your event is in a traditional setting or one more exotic, remember not to book too much space, it is better to err on the small than the large: looking full is preferable so that it does not appear that you threw a party and nobody came.¹⁴ Many hotels have sliding walls to make a room smaller or larger. If it looks like you have overestimated, make it smaller, even if you have paid for the extra space.

Keep in mind the following questions when searching for your ideal location:

¹³ Event-Plannerwest.com

¹⁴ Room-to-People proportions recommended:

(The Corporate Event Channel www.corporateeventchannel.com)

Set up:	Sq. ft. per person
Auditorium	9-10
Buffets	8-10
Receptions	8-10
Sitting Banquets	10-14

Table size/accommodations	People
Rectangle 5'X36"	6-8
Rectangle 6'X36"	8-10
Rectangle 8'X36"	10-12
Round 42"	4
Round 48"	4-6
Round 54"	8-10
Round 60"	10
Round 72"	12



- What type of ambiance do you want to create including the image you want to project?
- Can it be outdoors or must it be indoors?¹⁵
- Is it clean?
- Will the type of food you wish to serve ‘match’ and be easy to serve and eat at your location? Where will the food be served from? Will that conflict with the flow of guests, block their view?
- Is the location easy to get to and from? How central is it?¹⁶
- Are there parking facilities? Will traffic flow or will there be bottlenecks?
- Is it safe?
- Will entertainment have electric outlets where needed?

These factors and a clear idea of your budget will keep you focused on finding something appropriate.

With any site you choose (including your own building) it is important to visit the site (preferably when it is set up for a similar event) to see how it will accommodate you.¹⁷ It is also important to inquire about safety or insurance requirements at a specific venue¹⁸, any restrictions they may have¹⁹, and whether a deposit is refundable as well as when you have to be out of there.²⁰

Creating a realistic budget

A budget is comprised of income and expenses. Drafting the expense side of the budget is usually easier than preparing the income side. A good approach – at least in early drafts of your budget – is to overstate expenses and underestimate revenue.²¹

Expenses: You must absolutely cover your costs. Period. AND aim to make significant money beyond. To do so, you must carefully calculate your costs, including extras – be careful of “hidden” expenses (as discussed in various parts of this document). Include your own staff time and added office expenses. The entrance fee to your event should be designed to cover all these expenses with change but should never be more than your target audience can relatively easily pay.

Creating a budget involves creating three separate budgets.

The first is the initial budget. When planning your event, create a “wish list” which includes everything you can think of regardless of cost. Highlight all the things that you feel are absolutely necessary to establish these as musts. Once you have your preliminary budget you can then factor in all the optional items from your wish list.

¹⁵ If outdoors, depending on your location, you may need to ensure a rain option.

¹⁶ For example, if one were having a dinner where most attendees were coming from Lawrence, a New Jersey location would probably deter people from coming.

¹⁷ If this is not possible, you can sometimes get pictures of other events at that venue.

¹⁸ You would not want to discover a fire marshal restricting the number of attendees at the door of your event for exceeding safety levels.

¹⁹ Some locations will have restrictions on foods served, alcohol, etc.

²⁰ A garden may close at dusk when you only got started at 7:00pm....

²¹ Planning Special Events by James S. Armstrong



Actual Budget: At some point in time you will have a firm idea of how much everything will cost you and what your revenue sources and sizes are.

The third stage in creating your budget is a financial report. After the event is complete and all income and expenses are accounted for, put together a financial report for the event. This will help properly evaluate the event and formulate the next one.

The following is a list of basic expenses that you may want to consider:

- Admin
- Airway Tickets
- Band
- Catering
- Carry away items/ gifts
- Commission & Fees
- Decorations
- Dinner Journal – layout and printing
- Dinner Management
- Guest Speaker
- Hall Rental
- Hotel
- Invitation – layout and printing
- Mailing/Printing
- Mashgiach
- Miscellaneous
- Musician
- Phone
- Photographer
- Public Relations
- Set up and clean up staff
- Sundry
- Stuffing Envelopes and Postage
- Telephone Solicitation
- Temporary Staff
- Video

Sources of Income:

Direct funding for a program

Solicitations one-on-one

Tickets

Sponsorship

Donated merchandise/services

Items for sale at the dinner (Tapes, books, works of art, donated goods – Chinese or other auction.)

Sale of special privileges (spending time with the celebrity before or after) special seating – if auditorium) etc.



Advertising

It may be worthwhile to look into some excellent event-planning software programs, such as Event Maker Pro, however you can do the same with diligent leg-work and a pen and paper. You should assume you will need the following.²²

Income:

The Rule of Thirds:²³

This rule states that the total financial goal of a campaign will likely be met through three groups of gifts. One third will come from a few rather larger gifts, one third will come from a larger group of mid-sized gifts and one third will come from small gifts.

The 80/20 rule:

This rule explains that 80 percent (or more) of your gift income will come from 20 percent or fewer of the donors. The opposite is also true, the remaining 20% of your gifts will come from the other 80% smaller givers.

It is important to find the larger givers as they are what will make the event worthwhile. It is an easy mistake to assume that the entrance costs will cover your expenses plus earn your organization reasonable funds. Perhaps you need to reconsider the type of event and lower the costs to enable the organization to be left with enough funds.²⁴

Committees

No Rabbi, Principal or Director should undertake to make a dinner utilizing only the organization's own staff. While the organization's staff will do most of the soliciting, and other work, it is crucial to engage and create committees who will be responsible for a whole range of responsibilities related to your dinner/event. A dinner will simply not be worth the investment if it is all staff driven.

Many events leave a bad taste for Board Members, Committee Members and other volunteers because they are made to feel guilty at the last minute for not selling tickets or pitching in whenever needed. This generally happens because poor planning left roles and responsibilities unclear. All Board, Committee members and volunteers should be told clearly, up front what the organization's expectations are. (The same applies to staff members who are asked to assist with the event in addition to or instead of their usual duties.)

Furthermore, it is often unclear who is in charge and who carries the ultimate decision-making authority. Many of the best ideas were not successful, simply because it was not clear who was in charge. "No one can make a decision, but everyone feels empowered to provide a veto"²⁵ is not a good way to operate. While

²² How to Produce Fabulous Fundraising Events by Betty Stallings and Donna McMillion

²³ Planning Special Events by James S. Armstrong

²⁴ However, do not cut so low that you are left with a skeleton event that no one will be interested in attending...

²⁵ Planning Special Events by James S. Armstrong



each organization has its own culture and structure, it is important to clearly determine – and inform those working on the event, how decisions will be made, and who will make them. However, if the committee feels that you are making all the decisions they will suffer from alienation. We have identified two committees and two central people to make a dinner happen.

Dinner Committee

There are two types of dinner committees. One, to bring people in and a second to take care of the practical aspects. Your second committee should be responsible for choosing a location, negotiating price, choosing a theme, paper goods, food, selling seats for the event, flowers, general accessories and style. They should be charged with finding the right vendors for each of these items and negotiating proper deals. They should be charged with seating (your involvement may be a bit more needed here to avoid insulting anyone). They must be detail oriented and ensure proper space allowance, insurance, parking, place cards and other logistics are carefully planned.

Ad/Journal Committee²⁶

Your Ad or Journal committee should be charged with handling or managing calls to solicit journal ads. They should engage people from their various communities and shuls, businesses and other associations. They would be responsible for organizing that information and handing it over to your staff for entry into your database, working with your staff to collect the funds, send appropriate receipts and thank you letters, collect text for ads, author anonymous ads, work with the printer on pricing, look and feel, timing and layout. In short, the dinner journal is their chief responsibility – they are charged with making it happen.

Honorary Chairperson

Sometimes it is worthwhile to get an honorary chairperson for your event. The honorary chairperson is sometimes the guest of honor, though more often is a second person. This person would be a highly respected individual (for any of various reasons) and would not be really involved or contribute in any way towards the dinner aside from lending his name to the event and invitation. (And perhaps a nice donation to the organization.) This is especially useful if you aim to interest the higher realms of your local society and the person you choose is someone they admire. This name can broaden your base of support. For example, NCSY Boston invited Senator Lieberman to sit on their Dinner Committee. Obviously, the senator was not going to spend any time working the NCSY dinner, but he did send in a flattering letter of congratulations which was published in the dinner journal.

²⁶ If there is no ad committee- outsource



Dinner Coordinator

It may be necessary (especially if the Rabbi/Principal/Director of your organization is heavily overloaded) to hire a Dinner and/or Journal coordinator. The person hired needs to be very aware of the details of the organization, the image it wishes to project and the various donor histories in order to make a real contribution that does not conflict with the other goals of the organization nor damage or change an image cultivated over many years.

The responsibilities of such a coordinator would include: preparing a timetable for the event and ensuring it is followed by all participants. Coordinating the programming and details of the actual event, developing systems and procedures to market and produce the journal (solicitation, typesetting, proofing, printing, delivery, advertising), telesales campaign, updating the organization database with information collected: new donor, updated contact details, updated preferences, donations solicited, etc., engaging the guest of honor and other honorees as appropriate, developing promotional materials for the event.

Depending on the size of your organization and the target amount you hope to raise, the usual salary and incentive package for the event coordinator would range from \$10,000 - \$15,000 for the dinner plus a commission of 3-10% on the gross sales of ads. An initial minimum commitment of 20 hours a week is generally imperative growing to a higher 50-60 hours per week as the event draws close.

Your organization may be able to find someone within it's own ranks who can temporarily (or permanently) fill this position. It will only work, if that person can be cleared of most or all of their usual responsibilities so that they can really dedicate their time and efforts to the dinner. This is usually a plus as this individual is already aware of and aligned with the goals of the organization.

Volunteers at this level have a poor history but if the person totally identifies with the organization, then it may work out.

Volunteers and Delegation

Sometimes it is possible to find a lay person who is strongly committed to the organization to fill this function, on a volunteer or greatly reduced fee basis. If your organization is lucky enough to have such a lay person, it is important to ensure, as mentioned above, that they are truly aligned with the organization's style, methods and goals. It is also important that while they are given a fair amount of autonomy and responsibility, that the organization retains the ability to ensure that the dinner proceeds in a timely fashion.

Now here comes the tricky part, balancing the direction you are going to give the committee while giving them a certain sense of autonomy. Volunteers are likely to be high level people, perhaps running their own businesses or in other positions of authority. If you micro manage them you will be insulting and alienating them. Yet, on the other hand, they may be insensitive to Hashkafic or other sensitivities of the



organization. So, you can never afford to simply delegate and then completely disengage from their efforts. You must lay clear guidelines and keep your finger on the pulse.

Also remember to be considerate of your volunteer committee members. Many are doing this in the little “relaxation” time they have. Respect this by keeping meetings short, having clear agendas for each meeting and sticking to them. (Perhaps childcare can be provided by your students?)

When “hiring” volunteers, apply the principles (in laxer format) that you would use for a real hiring situation (bearing in mind that the volunteer is just that – volunteering). Clearly state the expectations of the position, any special skills needed, and the benefits the volunteer will gain.

Making Money

Regardless of the type of event you plan, it is important to remember that if you want money you will need to ask for it. Most people will not think to give you money, even when invited to a special event, unless your needs are known. Most people have no idea how much it costs to run a nonprofit or how they get money.

Don't get so bogged down in the details that you forget to focus on what will be needed to make this happen.

Bearing this in mind, there are a number of ways to ask for money.

Invitations

The guest of honor (and each honoree) should give you a list with contact details of all his friends and associates. Then print a letter approved by him which he will sign to be mail merged to everyone on this list. It is he and not the Mosad who is doing the inviting. Sometimes the guest of honor requires nurturing to produce all this information and this has to be done by a high level person in the organization.

Your invitation is your first line of request – where you reiterate your organization's contribution to society, mention your needs and ask for participation. This is not a direct appeal, but here too, you are seeking to engage your donor and request their support. Your invitation should preferably reflect the theme of the dinner in its wording and graphic design. For example, if the theme was ‘A City in Crisis,’ you would not put bright colors.

Many organizations prefer to start with a “hold the date” kind of notice before invitations are actually sent. These notices would be sent out between three and four months prior to the event, but aren't an actual invitation. These serve to alert your busiest – and usually most important – potential contributors to note your event on their calendar and keep it available for your event. This also serves to begin building the momentum/buzz/excitement about your event. Your “hold the date” invite should include some information such as the name of your guest(s) of honor (and a bit of



background on who they are), a key speaker or just a tiny, tantalizing bit of info on what kind of program is planned. These notices should mention that invitations will be sent.

You can mail these invitations via email or regular mail (most organizations will use a postcard format) to all your contacts, to a local area mailing list and can be posted on bulletin boards, in the local paper etc.

Some organizations will skip this step to save on the mailing costs. Most people come because of personal invites - invitations are not enough.

Invitation: What kind of invitation?

Your invitation can be grand or simple, striking or elegant. Try to choose something memorable and interesting, something people will not toss before opening, something that will pique their curiosity. For example, one organization who's theme was 'building', wrapped everyone's invitation around a brick and hand delivered it to everyone. This made quite an impression.

Always keep your invitation clear and ensure that you include all the key information (such as location, time, honorees, dinner committee/board member names, theme, price, your organization's contact details and the methods for response, and special requirements, if these exist). However, in order that your invitation should not look too busy, make the theme, the Guest of Honor and the speaker large, and all the other information much smaller. Bold the date. Your invitation need not be too expensive as many donors will be sensitive to what they will see as a waste of money, but it should be high quality never-the-less.

Someone reading the invitation should have the following questions answered:

- Who is doing the inviting, who is invited, who benefits?
- What is the occasion, and what are the prices and purposes?
- When is it happening (time and date)?
- Where is it happening (address)?
- Why should the prospect care and be moved to attend?
- How can a potential supporter get involved?
- Wow! Put in some attention-grabbing details²⁷

If at all possible, calligraphy or printing directly to envelopes and a personal return address (over your organization's POB) makes the invitation more personally appealing and motivates response.

A pledge card and return envelope (with postage or prepaid) should be included. (You are going to need another pile of pledge cards for the dinner itself.)

²⁷ Planning Special Events by James S. Armstrong



Give potential guests and givers many different ways to say yes on your devices, including requesting further information. Ask for hand printed contact details. Let guests know whether to expect tickets by return mail or pick them up or at the door. Be formal for formal occasions, but you can be playful for less formal ones. Let lots of people within your organization critique these materials to ensure they are clear and will work as intended.

Ad blanks and letters

Another round of mailings should be sent closer to the event with more ad blanks and return envelopes. This should be accompanied either by a second letter by the guest of honor or, if not, by one of his associates or Rabbi on his behalf. The letter could also come from one of his children or from one of the beneficiaries of your organization. It is a good idea to reach out to donors in more than one way and through more than one forum. Often, you need to remind people a number of times before they actually engage – and respond to your request. Your letters should have a deadline by which you expect returns.

When you do receive a commitment for a journal ad, a letter confirming receipt and stating thanks should be sent.

The worst error you could possibly make is to misspell a name on an ad. Always proof, proof and proof again and again all of your printed materials: invitations, publicity etc. as they are notorious for silly mistakes that will confuse your potential attendees. In particular, proof ads and send a final copy for approval wherever possible. However, in practice, 30-50% of ads will come within the last two weeks before the deadline.

Pricing Plan

Test a prototype with your dinner committee and a few other people to see whether you have achieved the right balance. By this time you should have also tested whether the cost of the dinner tickets is right (and/or in the case of a raffle/Chinese auction, etc. the relevant prices). The Palo Alto Kollel has been charging \$250 a ticket (\$500 a couple) for its first three dinners. This meant that the numbers started a little lower (the first dinner had 80 attendees), but on the other hand, it created an aura of exclusivity which was more attractive to some of the wealthier people they were targeting. The gamble paid off, for by the third dinner, they were up to 200 attendees. (They also charged a lot more for the more expensive journal ads., e.g. the platinum pages.)

Properly pricing your event is crucial. Under-pricing AND overpricing will create poor results. Tiered pricing is often the answer. VIP seats cost more, etc. Perhaps there is a pre-or-post event that only givers above a certain amount may join, more recognition for him/that company or fund, as discussed earlier, etc. It is a good idea to start soliciting from donors likely to give the largest commitments. (Remember the 80/20). Assign your best prospects to the best teams/solicitor. Each committee member should be expected to sell a table. In addition, depending on the quality of



your mailing list, you probably need to send between 25 and 50 invitations for every ticket sold. Appoint well-known figures to be table hosts with the expectation that they help to fill up a table. A list of the table-hosts should be printed on the invitations, giving people an opportunity to choose their table-hosts.

A few days before the event, concentrate on filling up the tables at any cost, even by giving away tickets for free. There is nothing worse than a half-filled room. If you have booked a hall for 400 and only 200 guests are going to come, see whether the hall has dividers to make the room smaller. Giving free tickets in exchange for air-time (radio advertising) (or something similar) is well worth the value in advertising. Friends and family should pay their way.

Publicity

In addition to the abovementioned mailing of individual invitations to your lists and those of your guest of honor and honorees, the organization should work to get the word out and the buzz going about their event. This can be accomplished in a number of ways such as advertising in the local papers or on local bulletin notices (Shul, schools,²⁸ etc.) and articles and pictures in local papers or in a local Shul or school newsletter and shul announcements. If the Rabbi of the Shul is being honored it can be awkward for him to encourage people to come. Rabbi Kalish of Lawrence, when he was being honored by TAG, found an elegant solution: “Rabosai,” he said, “we know that when the Rabbi is honored it is really the community and therefore I want to wish you all Mazal Tov on being honored and I hope you’ll all be there to enjoy your honor.”

Unpleasant Surprises

Almost every event is visited by some sort of unpleasantness. This can be a minor hitch such as a bad screech from the microphone, to a guest falling or a failure of the video equipment you were planning to use to a power outage.

It is imperative to create a contingency plan. You should prepare back ups of all computer systems, and videos or other materials you plan to show, etc. If you plan to have your affair outside, you must have a backup location to use in case of inclement weather (even if it never rains in your location that time of year.....) . Create a chain of command that will be used in case of an emergency, big or small.

Canceling your event

One of the most difficult things to do is to cancel a dinner, especially close to the time. It is embarrassing; it involves financial loss, and it may even alienate certain people. Yet there are certainly situations where one has to have the courage to do this. Suppose the worst happens and a week before you’ve only sold 50 of 400 tickets. Unwittingly, you are competing with three other organizations and the Super Bowl,

²⁸ A good example of an article which can appear in a local paper is the follow article (paid) published prior to a Heritage House dinner. (See Appendix A).



you already have the mailman and the janitor coming, and there is just no way that you are going to recruit more people. Under such circumstances you either have to cancel the event or relocate to a more intimate setting. A third option would be to reschedule. What you shouldn't do is hold out, hoping for a miracle [even Kiruv professionals don't have so many Zechuyos] because the longer you wait the worse it is going to be.

If you must cancel your event, be honest about the reasons for canceling (within reason). No matter how unpleasant this may seem to be, it is far worse to have rumors circulating with all kinds of wild tales. Notify everyone involved as soon as possible and use as many mediums as possible to get the message out. You want to be sure everyone knows about the change. Use e-mail, fax, mail, your web-site, print or media broadcast (if applicable), even phone calls. (Call vendors, suppliers, volunteers and leadership before you let the public know.) An apology should be made, and if the event is cancelled an offer for refund of donations/admission payments should be made. You may get lucky and people will sympathize and/or still stand by their donations, but your good name is worth offering to return them. Or perhaps, you can announce that the amount paid will be credited towards a future event (usually if there is something specific planned in the very near future.) You may be subject to a day or two of public scrutiny, but be honest and forthcoming and you will avoid a greater mess and more damage later.

4. Time Line

Making a timeline is the most vital aspect of creating a structure for your pre-dinner preparations. You may feel uncomfortable with cut-off times and deadlines for everyone (committees, vendors, volunteers) working with you, but without them a domino effect of lateness breeding lateness tends to kick in.²⁹

You also need to pay attention to your vendor's cut-off dates. For example: What is the final date your hotel or restaurant will accept guest count figures or a cancellation? Missed deadlines can easily result in huge extra expenses or badly insulting situations.

It is also a good idea, from the very start until the week before your event, to schedule twenty to thirty minute weekly meetings, to update your time line and get your finger on the pulse of what is getting done and what problems are cropping up. It is good to schedule these meetings for the same time and day of the week, and that it be honored by all participants. For the last week, it is suggested to meet daily or every second day as the pace becomes hectic.

Below are some timetables, sheets and other check lists as examples for your convenience:

²⁹ The Corporate Event Channel - www.corporateeventchannel.com



Event Scheduling Checklist³⁰

Planning Phase - 6-12 months ahead

- Decide event purpose
- Choose a theme
- Visit potential sites
- Research/appoint an event coordinator/manager (if applicable)
- Research/select committee chairpersons and members
- Get cost estimates (rental, food, drinks, sound, etc.)
- Get bids/recommendations for entertainment, printing and other major items
- Finance committee drafts initial budget
- Decide on admission cost
- Create sponsorship amounts/levels
- List items to be underwritten and possible sources
- Research/approach honorees (This can be done more than a year in advance as well. The earlier the better.)
- Compile mailing list (individuals/businesses)
- Check proposed date for potential conflicts, finalize date in writing
- Get written contracts for site, catering, entertainment, etc.
- Develop alternative site (if event is outdoors)
- Consider pre-party event for publicity or underwriting
- Invite/confirm VIPs
- Pick graphic artist; begin invitation design
- Create logo for event with graphic artist
- Order hold-the-date cards or other event announcements
- Set marketing/public relations schedule
- Develop press release and calendar listings
- Select photographer; arrange for photos of VIPs, chairmen, honorees
- Get biographical information on VIPs, celebrities, honorees, chairmen
- Investigate need for special permits, licenses, insurance, etc.

Tactical and Deadline - 3 to 6 Months ahead

- Begin monthly committee meetings
- Write/send requests for funding or underwriting to major donors, corporations, sponsors
- Request logos from corporate sponsors for printing (if applicable)
- Review with graphic artist invitations, programs, posters, etc.
- Prepare final copy for invitations, return card, posters
- Prepare final copy for tickets
- Complete mailing lists for invitations
- Order invitations, posters, tickets, etc.
- Make list of locations for posters
- Finalize mailing lists; begin soliciting corporations and major donors

³⁰ Ibid.



- Obtain lists from honorees, VIPs
- Set menu with caterer for food and beverages
- Secure permits and insurance
- Get written confirmation of celebrity participation/special needs
- Finalize audio/visual contract
- Select/order trophies/awards

2 Months Ahead

- Assemble/address invitations (with personal notes when possible)
- Mail invitations
- Distribute posters
- Finalize transportation/hotel accommodations for staff, VIPs, honorees
- Obtain contracts for decorations and rental items
- Release press announcements about celebrities, VIPs, honorees
- Follow up to confirm sponsorships and underwriting
- Review needs for signs at registration, directional, etc.
- All major chairpersons to finalize plans
- Hold walk-through of event with responsible committees, chairpersons and responsible site staff members (at event site if possible)
- Review/finalize budget, task sheets and tentative timeline
- Start phone follow-up for table sponsors (corporate, VIP, committee)

1 Month Ahead

- Phone follow-up of mailing list (ticket sales)
- Place newspaper ads, follow up with news media, on-air announcements
- Confirm staff for registration, hosting, other
- Write to VIPs, celebrities, program participants, confirm participation
- Complete list of contents for VIP welcome packets
- Get enlarged site plan/room diagram, assign seats/tables
- Give estimate of guests expected to caterer/food service
- Meet with all outside vendors, consultants to coordinate event
- Review script/timeline
- Order name tags for staff and volunteers
- Continue phone follow-ups for ticket/table sales
- Continue assigning seats; set head table, speaker's platform
- Confirm transportation schedules: airlines, trains, buses, cars, limos
- Confirm special security needed for VIPs, event
- Schedule deliveries of special equipment, rentals
- Confirm setup and the schedule of packing up and moving out times for after the dinner
- Finalize plans with party decorator
- Give caterer revised numbers
- Meet with chairpersons, key staff to finalize any of the above



1 Week Before

- Meet with all committees for last-minute details
- Finish phone follow-ups
- Confirm number attending
- Finish seating/table arrangements
- Hold training session with volunteers; finalize assignments
- Secure two or three volunteers to assist with emergencies
- Finalize registration staff
- Distribute seating chart, assignments to hosts/hostesses
- Schedule pickup or delivery of any rented or borrowed equipment
- Double-check arrival and delivery times with vendors
- Reconfirm event site, hotel, transportation
- Deliver final scripts/ timelines to all program participants
- Finalize catering guarantee, refreshments
- Confirm number of volunteers
- Make follow-up calls to news media for advance and event coverage
- Distribute additional fliers
- Final walk-through with all personnel
- Schedule volunteer assignments for day of event
- Establish amount of petty cash needed for tips and emergencies
- Write checks for payments to be made on the day of the event

Day Before Event

- Recheck all equipment and supplies to be brought to the event
- Have petty cash and vendor checks prepared
- Prepare copies of important documents such as a list of the VIPs, Board, the floor plan, guest lists, timeline for the evening, etc.

The Enjoyment Phase - Event Day

- Arrive early (with your change of clothes)
- Unpack equipment, supplies and make sure nothing is missing
- Be sure all VIPs are in place and have scripts
- Reconfirm refreshments/meal schedule for volunteers
- Go over all the final details with caterer and setup staff
- Check with volunteers to make sure all tasks are covered
- Setup registration area
- Check sound/light equipment and staging before rehearsal

The Afterglow Phase

See: *Follow up and Future Dinners.*

Good Luck!



Checklist and Other Important Information

- Take care of all the day to day operations
- Work and motivate the dinner committee
- Train dinner committee and solicitors (Journal)
- Work with the Dinner honorees
- Press Releases, e-mail, news papers, synagogues
- Clear shul calendars and community calendars for event and make sure Synagogues post event to their community calendar and bulletin
- Draft text for different solicitation letters, parents, alumni, NCSYers, advisors, contributors, letter to past supporters and attendees
- Mailings; save the date post card, request for tribute committee participation, initial solicitation mailing, Dinner invitation, follow up mailings to target groups
- Invite politicians, community leadership to join tribute and include greetings in journal
- Arrange for dinner tribute videos and multi media presentations
- Arrange photographer for evening
- Arrange for band (instruct to keep watch on decibel level)
- Arrange and follow-up with hotel, caterer, florist, etc.
- Get list from all honorees and synthesize them to one list/data base
- Send letters and confirm tribute committee
- Arrange for the innovations, ad blanks, mailings, PR
- Arrange and follow-up with Dinner Journal
- Work with printer
- Arrange (with dinner committee) table seating
- Arrange for awards to be prepared for presentation
- Personal journal solicitations.
- Personal dinner invitations
- Provide a full report (post dinner) and make recommendations for next year.

5. Guests of Honor

The guest of honor is a multi-tiered opportunity:

1. The distinction of being honored by your organization can be used as a way to thank a layperson or someone who is very active and supportive.
2. It can be a way to attract a specific crowd of people and interest them in your organization and access them for fundraising. For example, if you honor the head of Bank of America, because his son is in your school, many of his business associates will attend, and give to your organization, though your organization does not fit their usual charity criteria.
3. If approached and cultivated successfully – you may make new friends for the long run as well and not just for this one giving opportunity.



4. It can forge good inter-organizational relations. For example, you honor someone important in the Federation in your community, in recognition of all the support you get from the Federation.

It is often possible to combine these qualities in one individual or you may choose to honor more than one person. Besides the guest of honor, all honorees should receive some award, otherwise you may trivialize or diffuse the honor. You can differentiate by giving one a community service award, parents of the year or some other distinction to avoid overusing the honoree title.

To be eligible as an honoree, the person should have the following qualities:

1. The person must be willing to help the organization by lending his name and his support to the effort, as we will describe below.
2. The person should have some connection with your organization. Though the mayor may make a good speaker, he would probably not make a good honoree. He may even come across as awkward in such a role.³¹

Many organizations insist that the honoree's personal life and example be a reflection of the values of their organization and their world-view, Torah outlook in general. They will not honor someone whose standards of Torah and Mitzvos do not at very least reach a certain threshold. Others will honor a non-observant person, provided that he is positive about Torah and Mitzvos, or supportive of Torah causes, despite the fact that his personal life does not mirror that. Others still will honor an intermarried person, a movie star or other celebrity whose personal life is the complete antithesis of Torah values. Still, they trust the person to make a positive Torah message at the dinner.³²

When choosing your honoree, in addition to looking at your broader community, it is good to look over your list of main donors, laypeople, board members and friends, recent major events to determine if one of the people already committed to your organization may be the right person to honor to further deepen their relationship, include their friends and associates or thank them appropriately.

Another option is to focus on a once-in-a-long time event such as the recent passing of a dear friend of the organization: The dinner can revolve around remembering – and asking people to emulate – this individual's special ways and extraordinary support for the organization. Their spouse and/or children could be presented with an award, and his friends and relatives rallied to giving to his favorite cause (your

³¹ Every rule has its exceptions. When Ehud Olmert was mayor of Jerusalem he was the guest of honor for a number of organizations, including some Chareidi organizations. He always knew exactly what to say. However, the distinction between Mr. Olmert and possibly a non-Jewish mayor of your city is clear.

³² Ultimately, it is important to remember, a guest of honor at your event is being honored by your Torah organization and while accepting money from such individuals, befriending them and enlisting their help may be one thing, it is quite another to lavish them with public distinction and admiration. We respectfully suggest that such a choice would clearly dictate consultation with Daas Torah.



organization) or even a special fund within your organization to perpetuate his most important involvement.

A 25th (or other) anniversary of the organization can be used to create a themed set of honorees such as 25 teachers, 25 spouses of chief players/givers in the organization, 25 top students. Parents/spouse/work colleagues of these people would then be approached to support their honor.³³

Some organizations are committed to doing an annual dinner even if they do not successfully engage a worthy guest of honor. Perhaps they are frightened of losing momentum by skipping a year, once their target participants have become accustomed to coming to a dinner that time of year, each year. Occasionally they will appoint a guest of honor who is essentially a “stand-in”, someone respectable enough to fill the role, but not quite respectable, wealthy or powerful enough to garner real, new support or mobilize new people to your cause. While we understand and respect this approach, our position is that it is better to skip a year and focus on a quality event for next year, in cases where the right fit can not be found in time.

What can you anticipate/require from your guest of honor?

- A list of their friends, business associates, family members and others whom will be invited to participate in your event – and give to your organization in their honor.
- Personal stationary³⁴ which will be used for a personal cover letter and invitations. The guest will compose (or approve) a letter from themselves to their list requesting the presence of those people at the dinner and requesting their donation to your cause.
- A generous and committed guest of honor may dedicate some of his staff time and office infrastructure to assisting the organization³⁵ and thus lightening the organization's expenses and work load. The organization usually pays for the printing costs. Concerning the list of the guest of honor, the envelopes will hopefully bear the guest of honor's return address³⁶ and follow up calls will be made in his name.
- Another option, often more successful than the organization staff, is to delegate a friend, relative or associate of the guest of honor to make the follow up calls. This person can be more persuasive in reaching out to the honoree's list and asking them to honor them by participating. The guest of honor's Rabbi, if they have a close relation ship, and he is willing to participate in this

³³ Admittedly this last option will bring more communal support and name recognition than dollar value in most cases, but that is obviously specific to your circumstances, your community and your choice of honorees.

³⁴ Or allow you to print such stationary in his name

³⁵ Some honorees will insist on doing their mailing and calls “in house”. This is great for the organization in terms of lightening the work load, lowering costs and getting better responses from those invited. However, the organization will not have access to those lists for future use. Some information can be competently collected from return responses, registration, donation checks, etc.

³⁶ If a guest of honor does not want to burden his staff, but you do want to maintain his name as the return addressee, an easy compromise is to have his name with your address.



way, is another avenue through which to approach some of your guest of honor's contacts for involvement.

Your guest of honor need not necessarily be on any of your committees. You should, however, ensure that he/she is kept up to date on the progress of the dinner and related decisions. You want to foster the feeling that it is "their" dinner. Obviously you should consider – with seriousness – any input or suggestions they may have.

What do you present to your guest of honor?

A certificate or other memento should be given to your guest of honor and other honorees. This both enhances the honor you bestow on that individual at the dinner ceremony itself and offers them a lasting tribute – one that can be displayed in their office and home for everlasting tribute (and awareness of your organization).

The certificate can be a simple plaque attesting to the honor, a beautiful and autographed relevant photo mounted on a plaque, an object of art, an artistic creation made by a member of your organization or artist or any other distinctive item. NCSY in Boston, for example, had awards made by contribution by a famous artist, and once when honoring two Kohanim created appropriate glass articles to present – something different and elegant that they would be proud to display.

6. Other Invitees

Regarding the number of invitees, each organization must ask two questions:

- i. What is the minimum number of guests acceptable? Below this number, the dinner will be cancelled or postponed.
- ii. What is the desired number of guests?

For example, if you are running a dinner for the first time, you may aim to have 120 guests, but feel that you can still viably have the dinner for as few as 80 guests.

When making this calculation, it is important to remember that the cost of the hall, labor and other fixed costs remain the same – and as mentioned earlier – they must be covered by entrance fees. Although most income comes from the Guest of honor, other honorees, and the dinner journal, in most cases, a dinner for less than 180 people will not be viable. However, other formats, as mentioned above, may be suitable in such instances.

How to increase the numbers

- Partnerships developed to sponsor the event,
- Key individuals from the community participating,
- Invite local business people to join your board and ask them for their personal and business "rolodexes".
- Ask vendors you work with all year for their client lists.



- Join local merchant and trade associations and groups – first to introduce your organization and then to ask them to share with their associates.
- Keep your eye on the news to spot local big-wigs or big givers. Approach them personally.
- Offer young, socially well-connected people some kind of “reward” such as name-recognition, public thanks as a supporter, etc. if they can come up with a certain number of names.
- In all cases, stress that you are not competing for business, but rather soliciting for your cause.

7. The Journal

The journal is probably the primary way in which the event is going to make money. One can produce the same size journal both for a large, traditional dinner and for smaller dessert/lecture/etc. affairs. Therefore ensure that a majority of the time put into the dinner is spent on soliciting ads for the journal. It is easy to miss this point.

Ads should be solicited from the following sources:

- Members of your own organization or community
- Vendors which your organization often uses
- Vendors used by the guest of honor or the honorees
- Anyone to whom you are selling a dinner ticket
- Organizations and societies with a relationship to the guest of honor or honorees

Many organizations employ a battery of telephone solicitors who work on commission or commission with a certain base-line. (Callers should not be paid on an hourly basis.) The Torah Day School of Atlanta has a concept called ‘Fair Share.’ This requires each set of parents to raise a certain sum per child. Many parents do this by soliciting dinner ads, which is often the easiest, most elegant way of raising funds especially for working parents.

Layout of the ads should be done by a graphic artist the first year of the dinner at least, although this is a skill that can be done in the house with experience. One can solicit ads that are written up ‘camera ready,’ i.e. fully laid out.

Ads go in graded order, from single lines, quarter pages, half pages and full pages. In addition, pages are color coded, platinum, gold, etc. The trick is to see whether one can upgrade donors from one category to the next with each dinner.

When setting up your call team, especially when it is paid help, it is important to delegate names appropriately. Your biggest giver will not respond favorably to an anonymous caller, and you would not want to pay high commission for an ad solicited from a donor who has already pledged a given amount to your organization for the year and who is just making payment now. Many organizations lose out by soliciting a small ad from a potentially large donor who then feels that he has fulfilled his obligations for the year.



8. The Evening

Most dinners are boring, which is why most people only go to dinners reluctantly. This does not have to be so. Your organization can develop a reputation for making inspiring dinners that people will actually want to go to. None of us like long speeches and none of us like many speeches. Combine the two to be sure to ruin the evening.

How do you ensure your event is interesting and memorable?

The attraction for most dinners is a top-notch speaker, one that your community does not usually have access to. This can be a speaker from the Torah world or even a well-known politician. However, there are many other ways to make such an event memorable. Testimonials by participants to your programs, a famous Jewish singer, or even a well-done play can all be inspiring and uplifting.

A different approach would be to try and make the evening fun. For example, the Atlanta Scholars Kollel for their Bar Mitzvah dinner preformed a play based on the well-known film 'It's a Beautiful Life.' The Rosh Kollel, after having a particularly discouraging donor phone call, almost gave up when out came the Kollel's 'guardian angel.' What followed was a multi-media video presentation of the impact the Kollel has had on Atlanta. This was perfect for their audience, which was mostly non-religious, and was funny and entertaining while effectively communicating the good work of the organization.

The Palo Alto Kollel dinner did not have a major speaker at its recent dinner. Rather, they relied on a combination of other things. They hired a group of professional auctioneers to auction off very creative things, a helicopter or boat ride, for example. But, more importantly, they auctioned off ten hours of private study and counseling time with a rabbi to the highest and then to the second highest bidder. This in turn gave Torah, and those who represent it, a certain chashivus. The auction itself brought in an extra \$40,000 to the evening.

Everybody appreciates a shorter rather than a longer event. Whatever your program, it is good to prepare and provide a program so attendees know what to expect, but have an element of surprise.³⁷ Also, control sequencing and timing. Events should move briskly without appearing to lag at any point.³⁸ This requires considerable priming of all those giving speeches as even those who clearly know that shorter speeches are better liked than longer ones mysteriously forget this when they themselves are giving a speech. Too many speeches or speeches which are too long is a sure way to bore your audience and ensure they will not want to come again. Be sure to tell you keynote speaker something about your organization and specifically request that he refer to the organization in his speech. I have seen some of the most accomplished speakers not managing to achieve this.

³⁷ Clare Sullivan, CEO, Sullivan Group - www.sullivan-group.com

³⁸ Clare Sullivan, CEO, Sullivan Group - www.sullivan-group.com



Some organizations prefer to stage a grand surprise – people are excited and curious to attend, others prefer a more predictable, style, something people enjoy and an experience people come to associate with their event, and look forward to joining each year. For example NCSY will have a student speak, or a former graduate honored, will have a band and singing and NCSY Ruach.

Videos, no matter how well done, will not attract people to an event. However, they are a good way to (re) introduce people at the event to your organizations work and give them an entertaining overview of all the aspects of your work.

NCSY also has used videos to present the honoree. They would film a short testimonial of the honoree with various highlights of his accomplishments and various family and friends speaking about him and use this to introduce the honoree rather than the MC. Again, this seems to hold the audience's interest better, can be presented to the honoree as a keepsake and will remain with the organization as a permanent testament with many complimentary statements recorded for future reference.

Another way to ensure the success of the evening is to make each and every guest feel welcome. Train your staff to act as good hosts/hostesses and to ensure that everyone who comes to the dinner, without exception, feels loved and wanted. Don't just put table cards out on a table, have a staff member on hand to greet and welcome. Other staff should be rotating the guests without imposing or being overbearing. Do not assign to this task any staff whose social skills are a little awkward in these situations.

The Food

It is important to check with your venue before confirming a specific caterer. Many hotels and other venues will only allow caterers on their approved list into their kitchens.

Make sure that your caterer is providing a full service, including waiters, cutlery and crockery, a mashgiach, and Kashering the kitchen if need be. Specify that they are responsible for a full clean-up. Caterers can be helpful in assisting you to choose a location to begin with. Most are knowledgeable about the different event locations in your area. Therefore it is advisable to take a caterer before you book a hall.

It is important to have the caterer review the site with you, the type of food and how it will be served, as well as the number of serving personnel you will need.³⁹ If you plan to serve alcohol it is imperative that you check that your caterer has on-premise

³⁹ Recommended Staff to Guests: Event-Plannerwest.com

Sit-down meal:	1 server to 20 guests
Buffet:	1 server per 40 guests
Sit-down or buffet:	1 captain per 100 guests
Cocktail Party:	1-2 bartenders per 100 guests

Beverage portions:
Coffee – 1 gallon – 60 cups
Punch – 1 gallon – 24 people
Wine – 1 – ½ liter – 8-6oz glasses



or off-premise alcohol beverage permits as well as liquor liability insurance. If you are doing your event at a site other than the caterer's hall you are obligated to check if the facility has restrictions on alcohol.

Give your caterer a schedule of the event to facilitate scheduling how much time he needs for set-up and clean up, limitations on kitchen availability etc. This will allow the caterer to avoid having serving and clearing done while someone is speaking. This is the ultimate distraction for the audience and insult to the speaker. A caterer who is not aware of the schedule may have the food ready to be brought out and if the timing is not good, the food will then get cold.

Inquire if there are any extra costs for personnel such as bartenders (if applicable) etc. Also carefully coordinate that catering deliveries will not conflict with other deliveries you may have (sound system, other) at the loading entrance.

Payment procedures will vary among caterers, however a sizeable down payment is usually required with the balance due the day of the event. Ask for a total of all costs beforehand – fees, gratuities, extra charges, taxes, overtime, payment schedule and cancellation policy to help you avoid last minute surprises. Get everything in writing and sign contracts several months before your event.⁴⁰

It is always a good idea to have a “tasting” session with your caterer before finalizing with him, or at least before determining the menu. (This can be used to treat hardworking volunteers and staff too, though not more than two or three.)

Rental Tips

Rentals can provide the best route to nice table settings, plates etc. It is prudent to check with either an event planning professional, a professional at your venue, or lay person with experience, as they will often be best at having an idea of the specific type and amount of necessary equipment. But be warned, rentals can easily comprise a significant chunk of spending; for example plate rentals can cost anywhere between 60 cents to as much as ten dollars!

Make sure that the delivery date is the day before the dinner, and not on the same day, to give you time to take careful inventory when you receive the merchandise to ensure you received everything as ordered, and in proper form. Read the fine print on any contract and be specific about surcharges, charges for items broken or lost, and whether the items must be cleaned before they are returned.

Photographs

People like to see themselves in photographs. Getting a picture of each couple alone after the dinner may be a lot of work, but is a great way to make sure that they come back again. However, it is also a considerable expense. Perhaps you will be more disciplined and limit the keepsake thank you's for chief donors and maybe also staff.

⁴⁰ Event-Plannerwest.com



In addition, memorable pictures and/or videos of your event can become an important part of your future marketing. Consider these points before making a decision:

- Do you know why you want photographs of your event?
- Are you planning to revamp you brochures in the near term and could use a wonderful shot or two?
- Will you be getting coverage in the media that would be enhanced with a picture and/or video clip?
- Are there significant donors who would appreciate that plaque (with their picture with the local celebrity from your dinner) that can be presented as a thank you or another event and prominently displayed at their business or home – providing you with an appropriate gift and continual exposure to their colleagues and friends?

Other points to consider when hiring a photographer:

- What media do you wish for the finished product? (electronic copies, black & white, prints, slides, video?) (Keep in mind that media usually has very specific requirements for any prints you may want to include...)
- How much time will you need the photographer on hand? (Price over time!)
- Does the photographer have specific experience with this type of event?⁴¹
- Will you receive full rights to the pictures and negatives or will the photographer retain any rights to them? (Also, will there be reprint charges?)
- How soon can the photos/video be expected after the event?
- Be specific about which shots you want, the photographer is not a mind-reader and it will be hard for you to spend the entire evening with him...
- Be sure the photographer has all he needs, including lighting, settings etc. before the event starts.

9. Follow-Up and Future Dinners

Thank you's

Kim Klein of Grass Roots Fundraising coined the term “Thank before you Bank”. Write thank you notes before you deposit the checks. This will force you to make thank-you notes a priority. On the other hand do not delay depositing checks too long or the donors may wonder if you really need the money and the checks may become stale. Make a list of people to be divided amongst various staff who will receive an additional handwritten line or two at the bottom of the generic thank you.

⁴¹ Groups, Stills, Portraits, Specific Moments, Specific People: Unobtrusive or in-your-face?



One of the most often-voiced complaints from donors is that they never hear from their recipient organizations, except when they need something. Find the time and the way to thank your donors, over and over. It is a worthwhile investment and motivator for future giving. Send thank you's at several of the following junctures: send a thank you when the donation is received, send another thank you letter after the event, print a thank you in the ad journal, thank them in the process of inviting them to another event "as one of our special donors", announce thank you's at the event, post a general thank you to your website, send another thank you with a copy of the receipt around January to help them with their tax records.

Thank you's are crucial not only to donors but also to those who volunteered their time to help you and others who worked for you to make your event a success. Take the time to send out letters to all those who helped – Rabbis who announced your event, parents of your students who chipped in, even the students themselves who stuffed envelopes, set up chairs or otherwise pitched in, to the Chairpersons and others on your committees. Don't just thank them, however, but give them feedback on the success of the event. Make them feel that they are still a part of things after the event just like they were before and during. You want them to walk away feeling good about what they did and very accomplished – this is the way to ensure that they (and their friends) will want to help out the next time you work on an event or campaign.

Informal recognition is important too. Sometimes the most meaningful way to recognize a volunteer is to put them in a position suited to their desires and strengths, sometimes opening the door for them to enjoy the experience, grow and realize new talents. Similarly, throughout the planning of the event, send or give volunteers small, fun filled updates or tokens. These need not be expensive but just let them know you are grateful and keep their energy up. Publicizing your volunteers is another way to express appreciation (however, be careful to be accurate both in including everyone's names and spelling them correctly). Giving them pictures of themselves at work or posing at the successful event is another not costly way to say thank you – it also becomes a keepsake, reminding them – and perhaps encouraging them to repeat – the experience.

Just after your event is also the time to try to get pictures in the local papers sponsored or paid as well as a short article about the event.

Evaluating your Fundraising Event

Taking the time to evaluate your program right after the event, while the details are fresh, is very important. It is important to gather your own staff, paid and lay people, to hear their feedback: Did you fulfill your financial and other objectives? Did people have fun/enjoy the event? What went wrong? What went right? What is the informal and formal feedback you got from participants? Even smaller details should be discussed: Vendors to reuse or avoid? Make note of suggestions and criticism to incorporate in next year's event. If results indicate, take stock to see if the event is worthwhile.



Right after your event is also the time to consider the people who attended and ask yourself if there is someone among them who may be a good candidate for honoree for next year's event. Now is the time to start building that relationship. It is the time to ask yourself if there were others among the audience who you could involve more in the coming year and with whom you can cultivate deeper relationships.

"Don't find fault. Find a Remedy"⁴²

This is not a finger-pointing, fault finding exercise, but rather one that seeks to discover what will ultimately best support your organization's mission in the future.⁴³ A positive future-looking tone for the evaluation is crucial. People should walk away from such evaluations feeling uplifted, that next year is going to be better than this year, rather than feeling any sense of failure over what they've done. Be careful not to solicit advice from anyone to whom you will be beholden if you do not afterwards follow their advice.

⁴² Henry Ford

⁴³ How to Produce Fabulous Fundraising Events by Betty Stallings and Donna McMillion



Appendix A: Sample article for local paper

Published in the Five Towns Jewish Times:

(Notice how this article establishes a connection between the people being solicited and the guest of honor, highlights the personal connection between the guest of honor and the organization and provides tantalizing information about the evening and details about the organization without being an actual ad.)

“The 5 Town Jewish Times has learned that Mr. and Mrs. Steven & Susan Shafer of Woodmere are the Guests of Honor at the upcoming “Responding to the Crisis” 4th Annual Dinner for Heritage House, Jerusalem. Knowing the Shafers as our entire community does, we are delighted at the excellent choice of honorees by this world-renowned Jewish outreach organization.

Heritage House, Jerusalem, with its Israeli Shorashim and Dor le Dor campus divisions, is best known for its legendary Founder/Director Rabbi Meir Schuster, who has spent the last 30 years keeping vigil at the Kotel, challenging young, Jewish visitors to intensify their relationship with their rich Jewish heritage. Rabbi Schuster has invited tens of thousands of people to participate in Shabbos meals in and around the Old City, to stay in the free Heritage House Jewish Youth Hostels, and drop in on informal classes with the inspiring Torah teachers of our generation.. It is through this warm and personal approach that literally thousands of young people have began studying in yeshiva, and become members, and leaders, of the Torah community.

Our own Steven Shafer is proud to be one of those who “happened by” Rabbi Schuster at the Kotel. Steven’s story goes back 16 years, to his trip to Jerusalem with his then teenage daughter. The rest of their dramatic and inspiring story is being saved for the presentation at the Heritage House Dinner!

The much-loved speaker and author, Rabbi Yissocher Frand, shlita, will be highlighted as the Guest Speaker for the evening, which includes exciting multi-media presentations about the new and innovative programs Heritage House is instituting in Israel, and around the world, to combat the current crisis both in world Jewry and in Eretz Yisrael today.

The 5 Town Jewish Times would like to invite all members of the 5 Towns to salute the Shafers and discover more about this dynamic organization. The best way to begin is to attend the Responding to the Crisis Dinner, scheduled for November 10, 2002 at The Marriott Marquis Hotel in Manhattan, and to place an ad in the Dinner Journal in honor of the Shafers. To make reservations and to place an ad, call 845-356-0202.”



Appendix B: Sample Timing script for a sit-down dinner

(Note the amounts of time allotted)

NCSY Ner Tamid Dinner Program for the Evening

	Time	Duration
Hors d'houvres	6:00	60 min.
Minchah	6:40	7 min.
Salad [<i>Blink lights at 6:45</i>]	6:45	15 min.
MC Welcome and National Anthem and Hatikvah	7:00	10 min.
Special Tribute to Dr. Moskowitz, A”H	7:10	7 min.
MC introduces Rafi Katz	7:17	3 min.
Sharra Hirsh for Yachad	7:20	4 min.
Entree	7:24	20 min.
Introduction of NCSY Video – Josh Vogel	7:44	2 min.
NCSY Video	7:46	7 min.
Music and dancing (while tables are cleared)	7:53	10 min.
MC introduces Rabbi Weinreb	8:03	2 min.
Rabbi Weinreb	8:05	15 min.
MC welcomes Esti Vishniavsky	8:20	2 min.
Esti introduces awards, attention to Video Screen	8:22	2 min.
Vishniavsky Video	8:24	8 min.
Vishniavsky Acceptance	8:32	10 min.
Esti redirects attention to Video Screen	8:42	1 min.
Dan Langermann Video	8:43	8 min.
Dan Langermann accepts	8:51	8 min.
Dan introduces Ari Solomont	8:59	2 min.
Ari Solomont	9:01	15 min.
Dancing (serve desert)	9:16	10 min.
Dessert	9:26	5 min.
Benching & Sheva Brachot	9:31	5 min.
MC says goodnight, Maariv	9:36	15 min.



Appendix C: Legal, Insurance and Taxes

You should check with your lawyer (or perhaps a pro-bono lawyer in your locality) regarding all contracts you enter. It is also a good idea to seek specific advice if you plan to have raffle drawings or any other form of “gambling”, different laws apply to different areas regarding raffles, auctions, etc.

You will need to have an insurance broker or capable lawyer check the various insurance policies you may need. Depending on your chosen location, if you plan to use fireworks or other pyro-entertainment, etc. you will need special permits and insurance. It is good to check these prior to your event and not violate any restrictions. Restrictions are also placed on how many restrooms a given number of guests require legally, how many emergency exits, etc. There are many details you will not even think of, so check with a professional.

Taxes. Do not invite your organization or your donors as targets of the IRS. Donations to special events usually can't be counted complete as tax-deductible gifts as they usually carry a “fair market exchange” – the service or other benefit your donor derives from attending the event. This has implications for both you/your organization and your donors. You should check with your attorney or tax advisors on what information and how it should be given to authorities and to your donors so that you can all properly file your revenues/donations appropriately. In addition, donors must have proof of their donations in excess of \$250 – in the form of receipt or acknowledgement letter from your charity. This, too, will require special wording. Check it out with a professional.



Appendix D: Heritage House Model Telemarketer's Packet/Ad Solicitation Script

Calling Lists

THESE ARE OUR PRIMARY TOOLS, AND MUST BE TREATED WITH CARE AND PRECISION. PLEASE NOTE THAT ALL INFORMATION CONTAINED IN THESE LISTS IS CONFIDENTIAL AND PROPRIETARY. THE INFORMATION IS NOT TO BE SHARED IN ANY WAY WITH ANYONE OTHER THAN AUTHORIZED HERITAGE HOUSE STAFF ASSIGNED TO THIS PROJECT. THE LISTS ARE NOT TO BE COPIED, NOR THE INFORMATION THEREIN USED FOR ANY PURPOSE OTHER THAN THIS CURRENT HERITAGE HOUSE CAMPAIGN. THESE LISTS CONTAIN PEOPLE'S VERY PERSONAL FINANCIAL INFORMATION, AND MUST BE TREATED WITH GREAT CARE AND SENSITIVITY.

Explanation of Layout of Reports

Top of Page is the page number for that report – the title of the report appears only on page 1 of that report. Bottom of page is the date and time the report was generated.

NOTE: Please be aware that the last and first record on any page may be a continuation of each other – we will try to eliminate the duplication before you get it, but if you have, e.g., pages 10-20 of a report, be sure that the Joseph Schwartz on the bottom of page 14 is not called again when you see him as the same Joseph Schwartz at the top of page 15)

Line 1:

Last Name (bold), His title & first name, Her title & first name, business name, phone numbers, e-mail, and, if a renewal, '99 and/or '00 Yes or No indicates whether they took out an ad in that year.

Line 2:

Address

Line 3:

If a renewal: Solicitor's initials, year of ad, size of ad, price, currency, Yes=Paid, No=unpaid

If not renewal: Donation history - date of recording donation, amount, currency, source or method of donation & date of check, solicitor initials (eg- RMS = Rabbi Schuster)

Line 4:

If a renewal: Text of ad

If not renewal: Continued donation history

Note that for renewals, the donation history will appear on a separate report.

Using the Lists

Please keep legible and detailed notes on the lists. This will help you enormously in



your follow-up calls, as well as in documenting anything that comes into question regarding your commissions.

Suggested notations:

LM 9/7 = Left a message on September 7. ALWAYS DATE EVERY ENTRY!!!

NA 9/15 = No answer on Sept 15

CB 9/3 = Call back on Sept 3 – then note this on your Follow up log for that date & time, indicating on the log where to find the donor on our call list (page # & list name). This will save you hours of precious time from going through your reams of lists, and it's in the follow up calls (anywhere from 2-8!) that we get the sale.

Ad Size - Indicate what size ad they purchased, how and when they intend to make payment – also enter this on your Daily Tracking Log

NO = they unequivocally declined to place an ad. We will not call them again this campaign.

Make any other notes about your conversation with them that will assist you in your follow up call.

Ad Blanks

These must be completely legible & filled out. You may also be faxing or sending a copy to pledgers, so keep this in mind when filling them out. ALL AREAS MUST BE COMPLETED.

Office Use Only box:

At the top right of the form, in the “For Office Use Only” box, next to Rec'd, put the date you took the ad, under TM (telemarketer), put your initials. If it is a Renewal, rather than a new ad, put an “R” next to your initials. In the blank space under the box, insert what kind of follow-up is needed. After you fax the ad to Leslie, next to FXD, put the date you faxed the ad.

Ad Selections:

If faxing or sending to donor, check or circle the ad pledged, or if they are just expressing interest, circle the ads you are suggesting. If filling out the form for them on the phone, check the appropriate ad box.

Ad Text:

Fill in text of ad. Greetings should be no more than 8-10 words – one or two lines. You may write the ad on a separate sheet of paper and staple it to the ad blank. We can use their camera-ready ad or logo & will size it appropriately. They can mail or e-mail the art to the Dinner Office.

Payment:

Encourage credit card payments whenever possible. If they would like make a series of payments, we can do that (including monthly for a year). Just make sure there are



no payments scheduled beyond the expiration date of the card. Get their name as it appears on the card, card number & issue/expiry date, and the billing address, if it's different than the address we have for them. Checks should be sent right away – the day you take the ad – and we do accept post-dated checks. All amounts are in US Dollars. Canadian is approximately 150% of US (i.e. \$1000 ad costs \$1500 US).

Personal Notes:

If sending the form and letter to them, you may write whatever personal note you would like on it, referring to your conversation, thanking them for their pledge of interest, and encouraging them, wishing them a Chag Sameach or Shabbat Shalom, or whatever might be appropriate on that day. You can sign my initials on the letter, but write a note signed from you on the bottom, based on your conversation.

Note for yourself that the deadline of October 7 is early, and we will be extending it by at least two weeks as that time approaches. Do not tell the prospective donor this, unless it is absolutely necessary.

The Phone Call

OPENING

"Hi. This is _____ calling from Jerusalem from Heritage House. Rabbi Meir Schuster (or whoever else is noted: Rabbi Edelstein, or any of the honorees whose list you're calling) asked me to give you a call. Do you have a minute now?"

If not, ask when a better time would be for you to call back, make a note of this on your calling sheet and follow-up log, thank them & hang up.

If yes, "Great. I'm calling, first of all, to make sure that you've received Rabbi Schuster's letter about our upcoming Heritage House Dinner."

"I got it, I already sent it in".

"Great. Thanks so much. If we don't receive it in a week or two, I'll give you a call, OK?" (Check your most current Ad spreadsheet to see if we've received it – I'll e-mail you the new ones every couple of days, b.n.)(Make a note of this on your follow up log & calling list – you do not get commission on such an ad, unless they didn't send it in & you follow up & get it).

"I got it, I was planning on looking at it and sending my ad in."

"Great. A lot of people are finding it easier to just let me take care of it with you on phone now – would you like to do that?" (If so, you get credit for the ad, if they decline and send it in, you don't, unless we don't receive it and you follow up, as above).

"I didn't receive it."

"You should have received it by now – let me check the address we have for you,



(then go on to taking it over the phone, or offer to fax NOW), but what seems to be working well for people is to take care of it on the phone with me now (if “Yes”, move to “Taking the Ad”, if “No – I’ll wait till I get it”, Fine, I’ll give you a call back in a week or two to check that you received it, OK?

APPEAL

"We're helping Rabbi Schuster put together the Journal for the dinner right now, and he is calling on you to show your support in the most visible and powerful way, by placing an ad in the Journal (if it's for an honoree, "We thought you might appreciate the opportunity of honoring so-and-so, who is being honored at the dinner – say what award they're getting..."). He's asking that you increase your donation to ___ (go up to the next category), which is a ___ ad in the journal, and that you please come to the Dinner, and bring as many friends and colleagues as possible. It promises to be an inspiring evening, and Rabbi Frand will be speaking!

ADDITIONAL APPEAL (not necessary for most people)

"As Rabbi Schuster said in his letter, we are at the brink of historic change in the world, and particularly in the Jewish People, and particularly in Eretz Yisrael. Heritage House is responding to the challenges of this time with fantastic, exciting new programs that have the potential to truly change the course of our destiny. The only thing that could hamper our efforts is not having your support. Since the Dinner Journal is the most visible and lasting tool we have to inspire new donors at the dinner – which we must do in order to make possible the our new programs reaching out to unaffiliated Israelis and youths, Rabbi Schuster is asking everyone to INCREASE their donation this year – to really give from their heart."

If they ask about programs, refer to sheet about new programs, including Shorashim Centers, SSNAP Student Leadership Program, Multi-media Seminars, World-wide follow-up, Learning center for Women, and other programs in the newsletter, e.g. the Hostels, which are responsible for bringing thousands of Jews back from the brink of assimilation and intermarriage, the follow up programs, the kiruv training programs, the North American college campus initiatives, the internet and multi-media programs, the Russian and Spanish programs).

TAKING THE AD

"How much are they?"

"We have a full range of ad sizes, and Rabbi Schuster (or whoever) was hoping that you would put in a _____ (suggest an amount appropriate to their giving history – a bit higher than their highest annual contribution).

If they balk: "Or, we have (suggest the next rung down)" It's good to laugh and make light of this part, then put a little pressure on. (Here is where tax deduction, maaser and post-dated payments come in – see your Information sheet).

Fill out Ad Blank completely – confirm their address, help A LOT, if necessary, with suggestions for their ad copy. Do you have some idea of what you'd like to say? If they hesitate, start suggesting "how about... " choose things from last year's journal



and adapt them a bit, or make them up yourself. We can do English or Hebrew or any combination thereof. Get exact spelling of names in either language, and we'll clean up Hebrew spelling if it's a common phrase & it's wrong. This will become easier as you go along and write tons of ads. Let them hem and haw and write on scrap what they want to say, then transfer it to the form when you get off the phone. READ IT BACK TO THEM, WORD FOR WORD. SPELL OUT NAMES, even if it seems obvious, like "Katz" or "Cohen."

THE DINNER

If they have purchased a full page or more, their ad includes 2 dinner reservations. Ask if they think they'll be able to attend the dinner, or if there's anyone else they might like to invite in their stead – please let us know now, or return their reservation when they receive the invitation in mid-October. Stress that we'd LOVE to have them there, and what a fantastic evening it will be. Also, ask ANYONE in the NY, NJ, CT, Philadelphia, MD or DC areas, no matter what size ad they bought, if they'll be attending the dinner.

OTHER WAYS TO HELP HERITAGE HOUSE

"Rabbi Schuster is asking that you call your friends and fellow supporters. Encourage them to place ads and to join us at the Dinner. Is there anyone that you think we should let know about the Dinner who might like to come or support us through a Journal ad?"

OBJECTIONS

"I'll just send a little something."

"I don't want an ad."

"When Rabbi Schuster comes, I'll give him a check – that's all I can do."

"We really appreciate that, but it would be so much more powerful a use of your donation if you would put it in the form of an ad today, because it would show the attendees, people who we are trying to court for additional support of Heritage House programming, which we so badly need, how strong a support base we have."

For Israel: "It's very important to inspire prospective donors in America by showing them that we have a strong support from our neighbors here in Israel, who see right up close, every day, the tremendous work that Rabbi Schuster and Heritage House are doing. We had a strong showing last year, and it's very important that we're able to do so again this year, especially with the situation as it is now."

Special Israel/Kiruv Pricing – this is to be given on a discretionary basis & not publicized. Use only if it's clear that they can't afford the regular price, or if they're willing to give more than the normal ½ page price, but can't afford a full page – we do want a strong showing from our Israel family.

Full Page: \$350 US (does NOT include dinner)

Half Page: \$225 US

Quarter Page: \$85 US

Greeting 180 NIS or \$40 US



If they want to remain anonymous, or say they don't need an ad, and just want to make a donation in the amount of the ad size, that's fine, just ask if we might write something in their space and sign "Anonymous" – they may want to compose it.

"We don't have the money now (e.g. stock market slumps, kids school tuition)"

"We know that things are difficult all over, but":

Approach #1: It is promised that Hashem will bring blessing in parnassa if we give tzedaka – it's the one area we're allowed to test him in! So, in a sense, you're really not risking anything, rather, bringing more bracha to yourself and your family.

Approach #2: Can I take a moment to tell you about the incredibly exciting things happening in Eretz Yisrael? (Go to script/info about programs in Israel, note the new programs listed on the ad blank)

The best way you can help support this is by taking an ad in the journal, coming to the dinner, and telling your friends!

On a more earthly note, we can do monthly payments on your visa (or any credit card) over the year. Do you buy a coffee or a soda every day? Do you think you can manage the price of a daily soda or coffee – (\$25 or \$50 a month) or even less (\$15/month)? We are also accepting post-dated checks up to a year, which many people are taking advantage of.

What Can you afford? X per month (e.g. \$18/month = \$216/year – you can give them a ¼ page ad for that!)

Even if no ad, everybody can give something – take whatever they'll give!

I don't like to post-date or make pledges: Would it be better if I called you back mid-October, before the deadline? If you feel they really don't have the money or won't/can't give, don't push any more. Thank them nicely, and wish them a good Shabbat or Yom Tov or whatever, and hang up.

ABOUT THE DINNER

What: Heritage House 4th Annual Dinner

When: Sunday, November 10, 2002

Reception 5 :00 pm, Dinner 6:00 pm

Where:Marriott Marquis, Manhattan

Who: Guests of Honor: Steven And Susan Shafer, Woodmere, NY

Dinner Chairman: Dr. and Mrs. Edward and Daryl Shapiro, West Orange NJ

Guest Speaker: Rabbi Yissocher Frand, shlita

IMPORTANT INFORMATION

Addresses to send checks:



In the US:
The Heritage House
Address,
City, State Zip Code
USA

In Israel:
The Heritage House
PO Box
Jerusalem
Israel

Canadians who want a tax deduction must send through:
To Be Determined

WIRE TRANSFERS
Name of Bank
Branch
Account #
Account Name:
Bank Address:

TAX DEDUCTIONS:
All US \$ contributions will be provided with a US tax receipt.

Give Solicitor a list of useful phone numbers, fax numbers, e-mail addresses, times that can be reached....

Heritage House Annual Dinner – Telemarketer’s Contract

This temporary, part time freelance arrangement with Heritage House is on an at-will basis and can be terminated at any time by either party. At the termination of the arrangement, all Heritage House-supplied items will be promptly returned to the Heritage House office. As a freelance telemarketer on this campaign for the Heritage House 4th Annual Dinner Journal – 2002, you will receive commissions based on your ad sales. You are required to put in a minimum of 20 hours per week until the closing of the Journal (date to be announced, approximately November 3, 2001), unless you have made other arrangements with the Campaign Manager prior to signing this contract.

Your expenses for telephone calls will be promptly reimbursed by Heritage House, with receipt of a copy of your detailed telephone bill, and your listing of phone numbers called for this campaign, or, using a dedicated service for Heritage House calls only. Heritage House pays a maximum of 4.5cents/minute for calls within the US – you are responsible for arranging this rate with your long distance company (1-800-Cucumber gives this rate). Calls from US to Israel should be no more than 8.5 cents/minute.



After the training/trial period, you will be paid a minimum guarantee against commission of \$15/hour. Your hours should be submitted on your daily tracking log on a daily basis, and you will be paid approximately every two weeks based on these reported hours. Only commissions over and above the hourly rate will be paid after the Dinner. Commissions are payable after receipt of payment from donors you have solicited, therefore, some follow-up on your part (with Heritage House's assistance) will be involved. If you do not participate in the follow-up, you do not participate in the commission. If you do not complete the campaign for reasons other than health, Heritage House will pay your commissions only on what is received at the date of your leaving the campaign, unless they agree otherwise.

Your commissions are as follows:

20% on any new or marginal increase of renewal ads

10% on renewal ads

You are to utilize the information contained in your Telemarketers Packet, and not to fabricate any information about Heritage House, our programs, or make any promises you do not have permission and confirmation to back up. As stated on the instructions for using the Calling Lists, ALL INFORMATION CONTAINED IN THESE LISTS IS CONFIDENTIAL AND PROPRIETARY. The information is not to be shared in any way with anyone other than authorized Heritage House staff assigned to this project. The lists are not to be copied, nor the information therein used for any purpose other than this current campaign for Heritage House.

I agree to the terms contained herein:

For Heritage House

Telemarketer

Callers Name: _____

Address: _____

Phones: _____

e-mail: _____



Appendix E: Comprehensive Dinner Checklist

Evaluate whether you should have a dinner/event

- *How large are your overheads going to be?*
- *How much are you going to have to do yourself and how much can you delegate?*
- *Do you have guests of honor, and if so how dedicated and available will they be?*
- *Are they going to bring in new people?*
- *What is your personal and organizational style?*
- *What works for you?*
- *Is the event important enough to your organization to merit the time and expense needed to properly stage, publicize and evaluate the event.*

What kind of event should you have?

- *Intimate Evenings*
- *One-Time Dinners*
- *Missions*
- *Dynamite Dinner*
- *The Non-Event*
- *A series/dessert series*
- *A recital*
- *A concert*
- *An auction*

Choosing a Date and Time

- *Are there competing events in your area that day/night (or even on the night before or afterwards)?*
- *Is it a busy season?*
- *Decide what time to start and end - consider the type of event, venue and distance from most of your participants.*

Choosing a Location

- *What type of ambiance do you want to create including the image you want to project?*
- *Can it be outdoors or must it be indoors?*
- *Is it clean?*
- *Will the type of food you wish to serve 'match' and be easy to serve and eat at your location? Where will the food be served from? Will that conflict with the flow of guests, block their view?*
- *Is the location easy to get to and from?*
- *How central is it?*
- *Are there parking facilities?*
- *Will traffic flow or will there be bottlenecks?*
- *Is it safe?*
- *Will entertainment have electric outlets where needed?*



Creating a realistic budget

- *Overstate expenses and underestimate revenue.*
- *You must absolutely cover your costs. Period. AND aim to make significant money beyond.*
- *Carefully calculate your costs, including extras – be careful of “hidden” expenses.*
- *Include your own staff time and added office expenses.*

Creating a budget involves creating three separate budgets.

1. Initial Budget

- ⇒ *Create a “wish list” which includes everything you can think of regardless of cost.*
- ⇒ *Highlight all the things that you feel are absolutely necessary to establish these as musts.*
- ⇒ *Once you have your preliminary budget you can then factor in all the optional items from your wish list.*

2. Actual Budget

- ⇒ *At some point in time you will have a firm idea of how much everything will cost you and what your revenue sources and sizes are.*

3. Financial Report

- ⇒ *After the event is complete and all income and expenses are accounted for, put together a financial report for the event. This will help properly evaluate the event and formulate the next one.*

The following is a list of basic expenses that you may want to consider:

- *Admin*
- *Airfare*
- *Band*
- *Catering*
- *Carry away items/ gifts*
- *Commission & Fees*
- *Decorations*
- *Dinner Journal – layout and printing*
- *Dinner Management*
- *Guest Speaker*
- *Hall Rental*
- *Hotel*
- *Invitation – layout and printing*
- *Mailing/Printing*
- *Mashgiach*
- *Miscellaneous*
- *Musician*
- *Phone*
- *Photographer*
- *Public Relations*
- *Set up and clean up staff*



- *Sundry*
- *Stuffing Envelopes and Postage*
- *Telephone Solicitation*
- *Temporary Staff*
- *Video*

Sources of Income

- *Direct funding for a program*
- *Solicitations - one-on-one*
- *Tickets*
- *Sponsorship*
- *Donated merchandise/services*
- *Items for sale at the dinner (Tapes, books, works of art, donated goods, Chinese or other auction.)*
- *Sale of special privileges (spending time with the celebrity before or after, special seating – if auditorium etc.)*
- *Advertising*

Committees

- ***Two Dinner Committees***
 - 1- To bring in people
 - 2- To take care of the practical aspects. Responsible for:
 - ~ *Choosing a location*
 - ~ *Negotiating price*
 - ~ *Choosing a theme*
 - ~ *Paper goods*
 - ~ *Food*
 - ~ *Selling seats for the event*
 - ~ *Flowers*
 - ~ *General accessories and style*
 - ~ *Finding the right vendors and negotiating proper deals*
 - ~ *Seating arrangements*
 - ~ *Ensuring proper space allowance*
 - ~ *Insurance*
 - ~ *Parking*
 - ~ *Place cards*
 - ~ *Seeing that all logistics are carefully planned.*
- ***Ad/Journal Committee***

Responsible for:

 - ~ *Handling / managing calls to solicit journal ads*
 - ~ *Engaging people from their various shuls, businesses and other associations*
 - ~ *Organizing information for database entry*
 - ~ *Sending appropriate receipts and thank you letters*
 - ~ *Collecting text for ads*
 - ~ *Authoring anonymous ads*
 - ~ *Working with the printer on pricing, timing and layout*



- **Honorary Chairperson**
 - ~ *Highly respected individual*
 - ~ *Would lend his name to the event and invitation*

- **Dinner Coordinator**

NOTE: IF THE DINNER COORDINATOR IS A HIRED PERSON HE MUST BE VERY AWARE OF THE DETAILS OF THE ORGANIZATION, THE IMAGE IT WISHES TO PROJECT AND THE VARIOUS DONOR HISTORIES IN ORDER TO MAKE A REAL CONTRIBUTION THAT DOES NOT CONFLICT WITH THE OTHER GOALS OF THE ORGANIZATION NOR DAMAGE OR CHANGE AN IMAGE CULTIVATED OVER MANY YEARS.

The responsibilities of such a coordinator would include:

- ~ *Preparing a timetable for the event*
 - ~ *Coordinating the programming and details of the actual event*
 - ~ *Developing systems and procedures to market and produce the journal (solicitation, typesetting, proofing, printing, delivery, advertising)*
 - ~ *Telesales campaign*
 - ~ *Updating the organization database with information collected*
 - ~ *Engaging the guest of honor and other honorees as appropriate*
 - ~ *Developing promotional materials for the event*
-
- **Volunteers and Delegation**
 - ~ *Must be truly aligned with the organization's style, methods and goals.*
 - ~ *You must maintain balance of keeping finger on the pulse without micro-managing.*
 - ~ *Remember to be considerate of your volunteer committee members.*
 - ~ *Respect this by keeping meetings short, having clear agendas for each meeting and sticking to them.*
 - ~ *Perhaps childcare can be provided.*

Invitations

- *Who is doing the inviting, who is invited, who benefits?*
- *What is the occasion, what are the prices and purposes?*
- *When is it happening (time and date)?*
- *Where is it happening (address)?*
- *Why should the prospect care and be moved to attend?*
- *How can a potential supporter get involved?*
- *Invitation should pique their curiosity.*
- *Wow! Put in some attention-grabbing details.*
- *A pledge card and return envelope (with postage) should be included.*
- *The invitation should preferably reflect the theme of the dinner in its wording and graphic design.*
- *The guest of honor (and each honoree) should give you a list of all his friends and associates with contact details of all his friends and associates.*
- *Print a letter approved by the guest of honor which he will sign to be mail merged to everyone on this list.*



- *Decide if you want to start with a “hold the date” notice - These notices would be sent out between three and four months prior to the event. A “hold the date” invite should include some information such as the name of your guest(s) of honor (and a bit of background on who they are), a key speaker or just a tiny, tantalizing bit of info on what kind of program is planned. These notices should mention that invitations will be sent.*
- *Most people come because of personal invites - invitations are not enough.*

Ad blanks and letters

- *Send another round of mailings with more ad blanks and return envelopes closer to the event, accompanied by a second letter by the guest of honor.*
- *Letters should have a deadline by which you expect returns.*
- *When you do receive a commitment for a journal ad, send a confirmation and thank you letter.*
- *Make sure there are no misspellings of names on ads.*
- *Proof ads and send a final copy for approval wherever possible.*

Pricing Plan

- *Properly pricing your event is crucial.*
- *Tiered pricing is often a good choice.*

Publicity

- *Advertise in the local papers or on local bulletin notices (Shul, schools, etc.).*
- *After your event is also the time to try to get pictures in the local papers, sponsored or paid, as well as a short article about the event.*

Unpleasant Surprises

- *It is imperative to create a contingency plan.*
- *Prepare back ups of all computer systems, and videos or other materials you plan to show, etc.*
- *Have a backup location if you are planning to have an outdoors affair.*
- *Create a chain of command that will be used in case of an emergency, big or small.*

Canceling your event

If you must cancel your event:

- *Be honest about the reasons for canceling (within reason).*
- *Notify everyone involved as soon as possible.*
- *Call vendors, suppliers, volunteers and leadership before you let the public know.*
- *Apologize and offer a refund of donations/admission payments.*

Time Line



Planning Phase - 6-12 months ahead

- Decide event purpose
- Choose a theme
- Visit potential sites
- Research/appoint an event coordinator/manager (if applicable)
- Research/select committee chairpersons and members
- Get cost estimates (rental, food, drinks, sound, etc.)
- Get bids/recommendations for entertainment, printing and other major items
- Finance committee drafts initial budget
- Decide on admission cost
- Create sponsorship amounts/levels
- List items to be underwritten and possible sources
- Research/approach honorees (This can be done more than a year in advance as well. The earlier the better.)
- Compile mailing list (individuals/businesses)
- Check proposed date for potential conflicts, finalize date in writing
- Get written contracts for site, catering, entertainment, etc.
- Develop alternative site (if event is outdoors)
- Consider pre-party event for publicity or underwriting
- Invite/confirm VIPs
- Pick graphic artist; begin invitation design
- Create logo for event with graphic artist
- Order hold-the-date cards or other event announcements
- Set marketing/public relations schedule
- Develop press release and calendar listings
- Select photographer; arrange for photos of VIPs, chairmen, honorees
- Get biographical information on VIPs, celebrities, honorees, chairmen
- Investigate need for special permits, licenses, insurance, etc.

Tactical and Deadline - 3 to 6 Months ahead

- Begin monthly committee meetings
- Write/send requests for funding or underwriting to major donors, corporations, sponsors
- Request logos from corporate sponsors for printing (if applicable)
- Review with graphic artist invitations, programs, posters, etc.
- Prepare final copy for invitations, return card, posters
- Prepare final copy for tickets
- Complete mailing lists for invitations
- Order invitations, posters, tickets, etc.
- Make list of locations for posters
- Finalize mailing lists; begin soliciting corporations and major donors
- Obtain lists from honorees, VIPs
- Set menu with caterer for food and beverages
- Secure permits and insurance
- Get written confirmation of celebrity participation/special needs
- Finalize audio/visual contract



- Select/order trophies/awards

2 Months Ahead

- Assemble/address invitations (with personal notes when possible)
- Mail invitations
- Distribute posters
- Finalize transportation/hotel accommodations for staff, VIPs, honorees
- Obtain contracts for decorations and rental items
- Release press announcements about celebrities, VIPs, honorees
- Follow up to confirm sponsorships and underwriting
- Review needs for signs at registration, directional, etc.
- All major chairpersons to finalize plans
- Hold walk-through of event with responsible committees, chairpersons and responsible site staff members (at event site if possible)
- Review/finalize budget, task sheets and tentative timeline
- Start phone follow-up for table sponsors (corporate, VIP, committee)

1 Month Ahead

- Phone follow-up of mailing list (ticket sales)
- Place newspaper ads, follow up with news media, on-air announcements
- Confirm staff for registration, hosting, other
- Write to VIPs, celebrities, program participants, confirm participation
- Complete list of contents for VIP welcome packets
- Get enlarged site plan/room diagram, assign seats/tables
- Give estimate of guests expected to caterer/food service
- Meet with all outside vendors, consultants to coordinate event
- Review script/timeline
- Order name tags for staff and volunteers
- Continue phone follow-ups for ticket/table sales
- Continue assigning seats; set head table, speaker's platform
- Confirm transportation schedules: airlines, trains, buses, cars, limos
- Confirm special security needed for VIPs, event
- Schedule deliveries of special equipment, rentals
- Confirm setup and the schedule of packing up and moving out times for after the dinner
- Finalize plans with party decorator
- Give caterer revised numbers
- Meet with chairpersons, key staff to finalize any of the above

1 Week Before

- Meet with all committees for last-minute details
- Finish phone follow-ups
- Confirm number attending
- Finish seating/table arrangements



- Hold training session with volunteers; finalize assignments
- Secure two or three volunteers to assist with emergencies
- Finalize registration staff
- Distribute seating chart, assignments to hosts/hostesses
- Schedule pickup or delivery of any rented or borrowed equipment
- Double-check arrival and delivery times with vendors
- Reconfirm event site, hotel, transportation
- Deliver final scripts/ timelines to all program participants
- Finalize catering guarantee, refreshments
- Confirm number of volunteers
- Make follow-up calls to news media for advance and event coverage
- Distribute additional fliers
- Final walk-through with all personnel
- Schedule volunteer assignments for day of event
- Establish amount of petty cash needed for tips and emergencies
- Write checks for payments to be made on the day of the event

Day Before Event

- Recheck all equipment and supplies to be brought to the event
- Have petty cash and vendor checks prepared
- Prepare copies of important documents such as a list of the VIPs, Board, the floor plan, guest lists, timeline for the evening, etc.

The Enjoyment Phase - Event Day

- Arrive early (with your change of clothes)
- Unpack equipment, supplies and make sure nothing is missing
- Be sure all VIPs are in place and have scripts
- Reconfirm refreshments/meal schedule for volunteers
- Go over all the final details with caterer and setup staff
- Check with volunteers to make sure all tasks are covered
- Setup registration area
- Check sound/light equipment and staging before rehearsal

Checklist and Other Important Information

- Take care of all the day to day operations
- Work and motivate the dinner committee
- Train dinner committee and solicitors (Journal)
- Work with the dinner honorees
- Press releases, e-mail, news papers, synagogues
- Clear shul calendars and community calendars for event and make sure Synagogues post event to their community calendar and bulletin
- Draft text for different solicitation letters, parents, alumni, NCSYers, advisors, contributors, letter to past supporters and attendees



- Mailings; save the date post card, request for tribute committee participation, initial solicitation mailing, dinner invitation, follow up mailings to target groups
- Invite politicians, community leadership to join tribute and include greetings in journal
- Arrange for dinner tribute videos and multi media presentations
- Arrange photographer for evening
- Arrange for band (instruct to keep watch on decibel level)
- Arrange and follow-up with hotel, caterer, florist, etc.
- Get list from all honorees and synthesize them to one list/data base
- Send letters and confirm tribute committee
- Arrange for the invitations, ad blanks, mailings, PR
- Arrange and follow-up with Dinner Journal
- Work with printer
- Arrange (with dinner committee) table seating
- Arrange for awards to be prepared for presentation
- Personal journal solicitations.
- Personal dinner invitations
- Provide a full report (post dinner) and make recommendations for next year.

Guests of Honor

To be eligible as an honoree, the person should have the following qualities:

- *The person must be willing to help the organization by lending his name and his support to the effort, as we will describe below.*
- *The person should have some connection with your organization. Though the mayor may make a good speaker, he would probably not make a good honoree. He may even come across as awkward in such a role.*

What can you anticipate/require from your guest of honor?

- *A list of their friends, business associates, family members and others whom will be invited to participate in your event – and give to your organization in their honor.*
- *Personal stationary which will be used for a personal cover letter and invitations. The guest will compose (or approve) a letter from themselves to their list requesting the presence of those people at the dinner and requesting their donation to your cause.*
- *A generous and committed guest of honor may dedicate some of his staff time and office infrastructure to assisting the organization and thus lightening the organization's expenses and work load. The organization usually pays for the printing costs. Concerning the list of the guest of honor, the envelopes will hopefully bear the guest of honor's return address and follow up calls will be made in his name.*
- *Another option, often more successful than the organization staff, is to delegate a friend, relative or associate of the guest of honor to make the follow up calls. This person can be more persuasive in reaching out to the honoree's list and asking them to honor them by participating. The guest of honor's*



Rabbi, if they have a close relationship, and he is willing to participate in this way, is another avenue through which to approach some of your guest of honor's contacts for involvement.

- *Your guest of honor need not necessarily be on any of your committees. You should, however, ensure that he/she is kept up to date on the progress of the dinner and related decisions. You want to foster the feeling that it is "their" dinner. Obviously you should consider – with seriousness – any input or suggestions they may have.*

What do you present to your guest of honor?

- *A certificate or other memento.*
- *The certificate can be a simple plaque attesting to the honor, a beautiful and autographed relevant photo mounted on a plaque, an object of art, an artistic creation made by a member of your organization or artist or any other distinctive item.*
- *Something different and elegant that they would be proud to display.*

Invitees

- *What is the minimum number of guests acceptable? Below this number, the dinner will be cancelled or postponed.*
- *What is the desired number of guests?*

How to increase the numbers

- *Partnerships developed to sponsor the event.*
- *Key individuals from the community participating.*
- *Invite local business people to join your board and ask them for their personal and business "rolodexes".*
- *Ask vendors you work with all year for their client lists.*
- *Join local merchant and trade associations and groups – first to introduce your organization and then to ask them to share with their associates.*
- *Keep your eye on the news to spot local big-wigs or big givers. Approach them personally.*
- *Offer young, socially well-connected people some kind of "reward" such as name-recognition, public thanks as a supporter, etc. if they can come up with a certain number of names.*
- *In all cases, stress that you are not competing for business, but rather soliciting for your cause.*

The Journal

Ads should be solicited from the following sources:

- *Members of your own organization or community*
- *Vendors which your organization often uses*
- *Vendors used by the guest of honor or the honorees*
- *Anyone to whom you are selling a dinner ticket*
- *Organizations and societies with a relationship to the guest of honor or honorees*



How to ensure that the event is interesting and memorable?

- *Develop a reputation for making inspiring dinners*
- *Keep speeches short and few*
- *The attraction for most dinners is a top-notch speaker*
- *Testimonials by participants to your programs*
- *A famous Jewish singer*
- *A well-done play*
- *Try to make the evening fun.*
- *Everybody appreciates a shorter rather than a longer event.*
- *Whatever your program, it is good to prepare and provide a program so attendees know what to expect, but also have an element of surprise*
- *Control sequencing and timing*
- *Events should move briskly without lag*
- *Make each and every guest feel welcome. Train your staff to act as good hosts/hostesses and to ensure that everyone who comes to the dinner, without exception, feels loved and wanted. Have a staff member on hand to greet and welcome.*

The Food

- *Check with your venue before confirming a specific caterer. Many hotels and other venues will only allow caterers on their approved list into their kitchens.*
- *It is advisable to take a caterer before you book a hall. Caterers can be helpful in assisting you to choose a location to begin with.*
- *Make sure that your caterer is providing a full service, including waiters, cutlery and crockery, a mashgiach, Kashering the kitchen if need be and full clean-up.*
- *Have the caterer review the site with you, the type of food, how it will be served, as well as the number of serving personnel you will need.*
- *Have a “tasting” session with your caterer before determining the menu*
- *If you plan to serve alcohol it is imperative that you check that your caterer has on-premise or off-premise alcohol beverage permits as well as liquor liability insurance.*
- *If you are doing your event at a site other than the caterer’s hall you are obligated to check if the facility has restrictions on alcohol.*
- *Give your caterer a schedule of the event to facilitate scheduling how much time he needs for set-up and clean up, limitations on kitchen availability etc. (This will allow the caterer to avoid having serving and clearing done while someone is speaking. This is the ultimate distraction for the audience and insult to the speaker. A caterer who is not aware of the schedule may have the food ready to be brought out and if the timing is not good, the food will then get cold).*
- *Inquire if there are any extra costs for personnel such as bartenders, etc.*
- *Carefully coordinate that catering deliveries will not conflict with other deliveries (sound system, other) at the loading entrance.*



- *Ask for a total of all costs beforehand – fees, gratuities, extra charges, taxes, overtime, payment schedule and cancellation policy to help you avoid last minute surprises.*
- *Get everything in writing and sign contracts several months before your event.*

Rental Tips

- *Rentals can provide the best route to nice table settings, plates etc.*
- *Consult with an event planning professional, a professional at your venue, or lay person with experience, as they will often be best at having an idea of the specific type and amount of necessary equipment.*
- *Be warned! Rentals can easily comprise a significant chunk of spending.*
- *Make sure that the delivery date is the day before the dinner, and not on the same day, to give you time to take careful inventory when you receive the merchandise to ensure you received everything as ordered, and in proper form.*
- *Read the fine print on any contract and be specific about surcharges, charges for items broken or lost, and whether the items must be cleaned before they are returned.*

Photographs

Points to consider when deciding whether to have a photographer:

- *Do you know why you want photographs of your event?*
- *Are you planning to revamp your brochures in the near term and could use a wonderful shot or two?*
- *Will you be getting coverage in the media that would be enhanced with a picture and/or video clip?*
- *Are there significant donors who would appreciate that plaque (with their picture with the local celebrity from your dinner) that can be presented as a thank you or another event and prominently displayed at their business or home – providing you with an appropriate gift and continual exposure to their colleagues and friends?*
- *People like to see themselves in photographs. Getting a picture of each couple alone after the dinner may be a lot of work and a considerable expense, but is a great way to ensure that they come back again.*
- *Perhaps you should be more disciplined and limit the keepsake thank you's for chief donors and maybe staff.*
- *Memorable pictures and/or videos of your event can become an important part of your future marketing.*

Points to consider when hiring a photographer:

- *What media do you wish for the finished product? (electronic copies, black & white, prints, slides, video?)*
- *How much time will you need the photographer on hand? (Price over time!)*
- *Does the photographer have specific experience with this type of event?*
- *Will you receive full rights to the pictures and negatives?*
- *Will there be reprint charges?*
- *How soon can the photos/video be expected after the event?*



- *Be specific about which shots you want, the photographer is not a mind-reader and it will be hard for you to spend the entire evening with him...*
- *Be sure the photographer has all he needs, including lighting, settings etc. before the event starts.*

Thanking Donors

- *Write thank you notes before you deposit the checks.*
- *Do not delay depositing checks or the donors may wonder if you really need the money, and the checks may become stale.*
- *Make a list of people to be divided amongst various staff who will receive an additional handwritten line or two at the bottom of the generic thank you.*
- *Find the time and way to thank your donors, over and over.*

Thanking Volunteers

- *Remember to thank those who volunteered their time to help you and others who worked for you to make your event a success.*
- *Take the time to send out letters to all those who helped – Rabbis who announced your event, parents of your students who chipped in, even the students themselves who stuffed envelopes, set up chairs or otherwise pitched in, the chairpersons and others on your committees.*
- *In addition to thanking them, give them feedback on the success of the event. Make them feel that they are still a part of things.*
- *Throughout the planning of the event, give volunteers small, fun filled updates or tokens.*
- *Giving them pictures of themselves at work or posing at the successful event is another not costly way to say thank you.*

Evaluating your Fundraising Event

- *Take the time to evaluate your program right after the event, while the details are fresh.*
- *Gather your own staff, paid and lay people, to hear their feedback.*
- *Did you fulfill your financial and other objectives?*
- *Did people have fun/enjoy the event?*
- *What went wrong?*
- *What went right?*
- *What is the informal and formal feedback you got from participants?*
- *Smaller details should also be discussed, e.g. vendors to reuse or avoid?*
- *Make note of suggestions and criticism to incorporate in next year's event.*
- *If results indicate, take stock to see if the event is worthwhile.*
- *Consider the people who attended and ask yourself if there is someone among them who may be a good candidate for honoree for next year's event.*
- *Were there others among the audience who you could involve more in the coming year and with whom you can cultivate deeper relationships?*
- *A positive future-looking tone for the evaluation is crucial. People should walk away from such evaluations feeling uplifted, that next year is going to be*



better than this year, rather than feeling any sense of failure over what they've done.

- *Don't solicit advice from anyone to whom you will be beholden if you do not afterwards follow their advice.*
- *After the event is complete and all income and expenses are accounted for, put together a financial report for the event. This will help properly evaluate the event and formulate the next one.*

Legal, Insurance and Taxes

- *Check with your lawyer regarding all contracts you enter.*
- *Seek specific advice if you plan to have raffle drawings or any other form of "gambling", different laws apply to different areas regarding raffles, auctions, etc.*
- *Have an insurance broker or capable lawyer check the various insurance policies you may need. Depending on your chosen location, if you plan to use fireworks or other pyro-entertainment, etc. you will need special permits and insurance. Restrictions are also placed on how many restrooms a given number of guests require legally, how many emergency exits, etc. There are many details you will not even think of, so check with a professional.*
- *Taxes. Do not invite your organization or your donors as targets of the IRS. Donations to special events usually can't be counted complete as tax-deductible gifts as they usually carry a "fair market exchange" – the service or other benefit your donor derives from attending the event. Check with your attorney or tax advisors on what information and how it should be given to authorities and to your donors so that you can all properly file your revenues/donations appropriately.*
- *Donors must have proof of their donations in excess of \$250 – in the form of receipt or acknowledgement letter from your charity. This, too, will require special wording. Check it out with a professional.*