SPECIAL EVENTS MANUAL
WHAT ARE SPECIAL EVENTS?

Special events are essentially effective methods of marketing. They stimulate interest, attract community response, and can build lasting relationships and support between the donor and council.

Special events generate revenue and are a source of operating income for local council budgets. Councils should not rely on special events to provide most of their annual income. These events are only part of a total fundraising program that should include FOS, grant requests, project sales, interest income, product sales, camping, activities revenues, trading post sales, and United Way. Just as you diversify an investment portfolio, you need a broad-based and diversified approach to fundraising.

Probably the most important thing to remember about special events is that they should be used not only as fundraisers but as friendraisers and each has their strengths and weaknesses.

<table>
<thead>
<tr>
<th>Fundraiser</th>
<th>Friendraiser</th>
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<tr>
<td><strong>Strengths</strong></td>
<td><strong>Weaknesses</strong></td>
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<tr>
<td>A variety of stakeholders have the opportunity to contribute</td>
<td>Least efficient way to raise funds</td>
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<tr>
<td>Camaraderie of shared activity</td>
<td>Most labor intensive</td>
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<tr>
<td>Visibility for council and cause</td>
<td>Very staff-intensive</td>
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<tr>
<td>Layering of funding methods</td>
<td>Risk losing the cause (of the council) in the effect (of the event)</td>
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Reasons for an Event

There are many reasons for offering special events in a local council.

1) They attract new supporters, some of whom may become involved in Scouting because of their participation in the special event and the cultivation process in which you engage to involve them in Scouting.

2) They offer another opportunity for current Scouting supporters to contribute more than once during the year. Note: Many FOS donors plan their annual gifts in advance. Even if they don’t increase their annual gifts, many will also participate in a special event that sounds fun and interesting.

3) They offer opportunities for council publicity, especially if prominent people in the community (such as local and national celebrities) are involved.

4) They present opportunities to recognize people who are supportive to the council, and important in the community. Depending on the type of event (or the honoree), the event may appeal to various cross sections of people and local industries, broadening the council's base of donors.
5) They communicate Scouting's message and impact on the community.

Coordinating, planning, and developing a great special event takes a lot of time. Before taking on a special event, estimate the cost of the event in terms of staff and volunteer time, resources, and expenses. If these costs outweigh the expected revenue and advantages of having the event, you probably shouldn't hold it.

This manual will share basic techniques for organizing, planning, and running a special event. Samples used by councils are also included.

**Budget Development**

One of the most important things to know when planning an event is what it will cost. To help you estimate your "Income vs. Expenses," put together a budget planning and accounting form. Estimates and cost projections will help you understand how much income you need to raise, how much you can spend, how much you need to charge participants, etc. **Of course, the most important way to reduce event expenses is to get sponsors or underwriters for the event.**

**Costs**

Some typical event expenses may include:

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<tr>
<th>Promotion</th>
<th>Mailings</th>
<th>Recognition</th>
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<tr>
<td>Printing/copying</td>
<td>Food</td>
<td>Facilities fee or site rental</td>
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<td>Speakers</td>
<td>Special guests</td>
<td>Special programs</td>
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<td>Program materials</td>
<td>Insurance</td>
<td>Music</td>
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<td>Lighting</td>
<td>Sound system</td>
<td>Transportation</td>
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<td>Postage</td>
<td>Security</td>
<td>Wardrobe</td>
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<tr>
<td>Flowers</td>
<td>Publicity</td>
<td>Vendor supplies</td>
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Accordingly, some typical sources of event income may include:

| Participation fees | Concession sales | Auctioned items |
| Tickets | Coupons |

**I. Important Components**

As with any fundraising campaign, there are certain components that every successful special event must include:

1) **Marketing**

The event must be well marketed – if people don't know about it, they won't be there. Make sure your materials are clear about the “five W’s” – who, what, when, where, and why – as well as the cost to attend. Councils should also include in the materials an estimate of the “value received” by each donor who participates in the event. Do a brochure or marketing piece that can be mailed either by itself or included with other council mailings.

2) **Leadership**

This is the most important ingredient for success. Event leaders should have a personal interest in the event and a proven dedication to Scouting. It also helps if they are asked to
participate by a friend or business associate. It is vital to involve some top community and business leaders. You need a strong chairperson – one whose personal leadership and contacts will help you get the right resources and attendees, and is willing to invite and involve their friends or business associates.

Once you have a chairperson, help them recruit an enthusiastic team. Tailor the leadership to the type of event. For example, if you are honoring a volunteer who is a bank president, a chairperson who is also a banker, broker, or finance professional will often increase your chances of success. If you’re honoring an individual at the event, make sure the honoree is deserving and well-respected in the community.

Things to consider when selecting both the honoree and chairperson include:

- Personal relationships to Scouting
- Giving ability
- Active on other boards
- Participation in other organizations and clubs
- Network of friends and/or business colleagues
- Educational background

3) The Volunteers

Regardless of whether they are council leaders, board members, or committee members, VOLUNTEERS MAKE IT HAPPEN! Make sure they understand their responsibilities and your expectations for their personal and financial support, time commitment to the event, and ability to solicit others for their support. Provide them with a one-page job description.

4) The Constituency (Niche)

These are the people you want to market to, and the ones you want to attend. Look at the past, present, and potential new donors, e.g., executive board, advisory board, annual supporters, vendors of the honorees, chairmen, council, and individuals who will be on the respective committees. Remember as you develop your marketing materials that such a broad range of constituents has a similarly wide range of interests. Care should be taken to not inundate your board or donors with events they are expected to support. To continually be going back to the board and donors goes against the basics of donor-centric development. Each event should have its own niche or audience comprised of members that are not part of the council’s other donor groups.

5) The Plan

To have a successful fundraising event, develop a well-organized and structured plan. Successful events don’t just happen. Some of the cornerstones of success:

- Establish a need for the event.
- Set a monetary goal that relates to the need, and develop a budget.
- Recruit good leaders to organize the event and solicit others to support it.
- Identify who you want to attend, sponsor and underwrite the event.

Although every special event is unique in many ways, there are basic steps that – if taken – will ensure its success. The importance of planning, organization and a fair amount of common sense cannot be stressed enough. It doesn’t matter if the goal is $10,000 or
$250,000. It's all about details. It's essential to start your planning early so the event runs smoothly and, more importantly, you meet your financial goals.

Choose an appropriate date for the event. Spring and fall tend to be the best seasons for most events. If it's an outdoor event, keep an eye on the weather and pick an alternative rain date or indoor facility. Pay attention to dates like religious and legal holidays, first and last weeks of school, other community events, and the week before and after an election. Even high school, college, or professional sports playoff periods are dates to avoid – especially if the “home team” is a perennial favorite. Check with your local Chamber of Commerce to see if their community calendar shows any major conflicts. When your date is set, have the Chamber add your event to their calendar; that way other organizations are also aware of it.

6) Planning and Preparation

Choose the date – then execute the plan. Set deadlines for each job to “head off” possible problems. Now is the time to recruit chairpersons and set up committees to organize the event. Try and have the chairperson select his or her own committee members – that way, the chairperson knows his committee will be reliable and trusted to do a good job.

**Location** for the event is very important. Be creative when selecting a location – especially if you can tie in the location with the event theme. A museum, art gallery, or other cultural or historical landmark can all be great locations. Explore some unusual or “less obvious” locations, but consider all the advantages and disadvantages. A “unique” location may incur higher costs, require more volunteer staff, and be hard to get to. Make sure your location is large enough to accommodate the event, and remember “little things” like the availability of parking, restrooms, coat-checks, kitchen facilities, and loading docks. These can make or break the event.

The event chairperson should work with other event staff – and even a professional advisor – to create an **event checklist**. It should include personnel needs (such as ticket-takers, cleanup people, and security), insurance, printing requirements (tickets, invitations, programs, menus, signs, posters, etc.), and publicity. Unlike most items on the checklist, publicity never ends – it’s a long-term commitment and doesn’t end until the event begins.

**Keep good records.** Keep track of the tickets sold, the cash and non-cash contributions made to underwrite, pledges, “regrets”, and those who never responded. Good recordkeeping will give you a great database for your next event. You also need this information so you can generate accurate receipts and “thank you” letters after the event.

7) During the event

The success of every event is gauged not only on the funds raised for Scouting, but on the progress made to advance and promote Scouting with each of the attendees. Thus, our goal is to have enough conversations of quality with participants so that we will gather the information to move them from being participants of events (eaters, shooters or golfers) to being loyal donors of the council. Remember, donors do not want to be connected to an event or campaign; they want to be connected with the people and causes served.

a. **Contacts.** You should do your best to collect information on every attendee of each event (name, position, company, etc.). Before the event, assign selected contacts to every staff and to selected volunteers with the
goal of them (staff/volunteers) having directed conversations with each of the selected contacts during the event.

b. Conversations. Develop a list of information that you’d like to have to enable you to better engage in cultivation activities with donors. Evolve that into a list of questions that staff and volunteers can use in conversations with participants at the event. Mix the questions with facts about the council and youth served so you do not seem to be ‘grilling’ the participants. Some questions or information could include:
   a. What (or who) brings them to the event?
   b. How do they feel about the honoree/activity/event?
   c. What do they know about Scouting? Were they a Scout?
   d. What other organizations do they support/like/believe in?
   e. How do they feel about character/values/leadership today?

c. Cultivation. Initiate a cultivation plan with each prospect, executed by staff, board and/or other selected volunteers. Assume your prospects are sophisticated, caring potential donors. Find ways to connect them to Scouts, help them share your mission and vision and show them your outcomes. **Communicate with them: This is our vision of what our community will look like when we achieve our mission!** Your end goal should be to engage them in an ‘ask’ at an appropriate time for a gift to Scouting. *(see Introduction, Annual Evaluation)*

8) **After the Event**

   a. **Pledge collections.** Call pledges immediately upon completion of the event. Have a system for collection: initial letter, second letter, and, if appropriate, a phone call.

   b. **Loose ends.** Pay the bills, return or sell equipment, clean and archive your files, etc. A good checklist list will help you take care of these items.

   c. **Thank-yous.** Have the event chairperson send thank-you letters to all participants, including donors of services or goods, and the volunteers.

   d. **Follow-up.** Keep in touch with participants; let them know about the event’s success. Include them on all mailing lists and inform them of future activities. Look for volunteers for next year’s event.

   d. **Evaluate the results.** Within four weeks of the event, put together an “after-action” report. Evaluate the event planning, leadership, volunteer support (board and committees), mailings, responses, attendance, ticket structure, and program format. Do an income analysis showing ticket revenues, contributions, and donations for goods and services. Have categories showing donor sources, and develop the budget and schedule for next year’s event. *(see next)*

9) **Annual Evaluation**

   Each year the council should engage in a process of focus group/census-taking that will help determine not only the success of events and how they can be improved, but will engage the event leadership and event participants in becoming true stakeholders in the council.
a. **Focus Groups.**
   a. Build several focus groups from current council board members, alumni board members, current and past event leadership and high-level event participants.
   b. Send discussion questions to focus group members two weeks prior on the premise that “we just want your advice”. Questions:
      i. What do you know about XYZ Council?
      ii. How do you think we are doing?
      iii. What could we be doing better?
      iv. How does ____ event help us meet our mission?
      v. What could make ____ event better?
   c. Where possible, survey event sponsor’s employees (on-line perhaps or through e-newsletter) Questions:
      i. Do you know your company sponsors ____ event?
      ii. What do you know about XYZ Council?
      iii. How do you think we are doing?
      iv. What could we be doing better?
   d. Report back to focus groups: Here’s what you suggested...here’s what we’re doing.

b. **Census-Taking.**
   a. Engage in a process of census-taking to engage prospects who have been cultivated at events.
   b. Utilize staff, focus group members and selected volunteers. Questions:
      i. What do you know about XYZ Council?
      ii. Do you know who we serve?
      iii. How do you think we are doing?
      iv. What could we be doing better?
      v. What do you know about ____ event??

c. **Evaluation.**
   For each event determine:
   a. What type of event/What is the audience niche?
   b. Who is involved/Who do we want involved?
   c. What resources do we need to achieve even greater success?

**II. Selecting the Event**

Special events attract supporters who: a) are interested in the activity, and/or b) want to support Scouting. Special events take many forms: dinners, concerts, art and exhibits, variety shows, balls, dinner dances, sports awards banquets, golf tournaments, tennis tournaments, theater parties, auctions, and parties in unusual places.

It is important to choose the right event – an event the council can handle, and an event that the board supports with their time and talents. **The reason for any special event is to raise funds for the council.** If that sounds obvious, it’s not. As you get caught up in the excitement of the event planning, it’s easy to forget that the projected income from the event must justify the time and expense you put into it.

**Sponsors**
Cultivating and prospecting potential underwriters will directly reduce the costs of the event—and greatly increase the chances of a successful event. Special events are excellent opportunities to raise funds by involving local businesses and industries. They also provide mutual benefits—the council receives more net dollars, and the sponsor receives publicity and is associated with a successful activity. Tell potential sponsors that they will receive special recognition in all printed materials for the event, and be publicly acknowledged during the event. Try to “sell” one large sponsorship to a single underwriter. If this is impractical, then offer various parts of the event to a number of sponsors (e.g. underwriting the printing of the program, the entertainment, the meal, etc.).

III. PROMOTION

Letters promoting the event should be sent by the chairperson on letterhead. The first letter will announce the event and provide more information. It should include a response card (or give participants the opportunity to RSVP by e-mail) and this response should be addressed to the chairperson, but at the council's mailing address (to avoid bothering the chairperson at his or her office). Provide a telephone number that prospective participants can call for more information. Also, remind people about your council's Website and prominently post more information there about the event.

It's always a good idea to involve people in specific (and targeted) industries; they can write to others who share their business interests. For events that will be more entertainment or “high society” oriented, involve socially prominent individuals who will contact their friends, peers, and other names supplied by the council. Usually, business leaders are most effective in involving other corporations and socially prominent individuals.

Mailing List

To effectively market your event, you must have a great (and accurate) mailing list. Many councils have compiled and updated lists for many years. ScoutNet has been a great help to councils in this regard. These lists include major donors, district and council volunteers, emerging business leaders, and other names from friends, the media, etc.

Make sure your list includes contacts of both the honoree and the chairman, i.e., their friends, associates, vendors, and board members of organizations they continue to support. Also compile a list of business leaders who are admirers and peers of the honoree. The guest of honor or a close friend can help compile this list.

Use business references such as Standard & Poor's Register, Dun and Bradstreet's Million Dollar Directory, and online references such as www.hoovers.com (as well as the Research Portal available to councils on the BSA’s FID Web site, www.scouting.org/financeimpact) Since the first letter will be an invitation to serve on the steering committee, the response to that letter will help sort out those who are interested from those who have declined to serve (and can be eliminated from further mailings).

An Effective Letter

Once the steering committee is formed, print out a list of those accepting, and enclose it with the follow-up letter. Put together a special letterhead for the event with the names of the chair and co-chairs on it, and send out future correspondence on it. This letter can include further
news about the event and a reservation form. It should list the guest of honor, event leaders, time, place, council name (of course), and names of special guests.

Sometimes people buy a full table for the event, but cannot fill it. Always offer invitees the option of making a contribution for any unused seats at their table. The reservation form should be a combination reservation/contribution form. You’ll have a lot of people who know the guest of honor but are unable to attend. Many of them will make a contribution in lieu of attending — if you make that easy for them to do so. An effective letter will generate substantial contributions as well as event reservations.

Along with the reservation form, include a return envelope addressed to the chairperson at the council’s address. If possible, send a follow-up letter to those who have joined the committee and to selected non-respondents — e.g. those who you’d particularly like to attend, as well as board members who just haven’t gotten around to responding. Proper seating of both the main table and attendees is important. Guests at the main table usually include council leaders, event chairperson, honoree, and selected public officials.

Again, if you’re providing an e-mail option for reservations — an increasingly popular option — use procedures that are similar to mail-in reservations.

IV. Position Descriptions

The general chairperson is responsible for recruiting the steering committee. The steering committee will include the program and special guests chair, public relations chair, community chair, and block sales chair. These men and women should be top community leaders and each should have a one-page job description. Some general job descriptions are given below; more detailed descriptions appear elsewhere in this guidebook.

**General Chair**
*Hosts and presides at steering committee meetings
*Presides at kickoff meeting
*Takes part in the program
*Supervises the event's organization and timetable
*Conducts evaluation meeting following the event

**Program and Special Guests Chair**
*Secures celebrities, entertainment, speakers, or special guests (varies with type of event)
*Develops a list of top business and social leaders to invite as special guests
*Arranges reception, seating, and hosting of special guests
*Coordinates program features with Scouting features, where applicable

**Public Relations Chair**
*Secures printed event promotion brochure at low or no cost to the council
*Develops printed programs, letterheads, tickets and other selected items
*Announces guests to press
*Maintains close relationship with media
*Maintains close relationship with related staff advisor

**Physical Arrangements Chair**
*Prepares list of physical requirements for the event
*Investigates appropriate facilities for the event
*Selects best facility and negotiates arrangements with approval of steering committee and Scout executive
*Arranges for volunteer workers to handle decorations, crowd flows, special parking, equipment, etc., as required
*Sets timetable to have materials prepared and positioned
*Arranges for takedown and storage or disposal of materials and equipment

V. Prospecting

Prospecting potential attendees for a special event takes effective coordination. It's important that councils and volunteers don't compete against each other in fundraising activities. All prospects should be cleared on the council's master list to avoid duplicate solicitations. Prospects tend to fall into three categories:

1) People who already give to Scouting in an annual Friends of Scouting (FOS) campaign, but would give or participate because of their interest in the event.

2) People who give token amounts through an annual campaign, but may give substantially more through a special event. Focus on these donors as “special event donors” – especially if you think this is where they’ll give the most. This is called "upgrading."

3) People who usually show no interest in an annual campaign – or even in Scouting – but who enjoy attending special events. This is called "new money."

Major Prospects

Identify 10 to 15 prospects with the ability to support the event with a major gift. For these selected prospects, prepare an effective proposal that can be delivered by the right person.

Good prospecting includes getting each prospect assigned to the right person. Work within the “area of influence” for each prospect, so they can be appropriately assigned. Great events depend on advance sales – the more tickets you sell in advance, the more successful the event will be.

Build in a "block sales" structure to accommodate large sales. Have everyone try to sell one or more tables. Companies, professional organizations, service clubs, and industries (especially those related to the honoree’s field) will make great prospects for block sales. Banks often arrange participation for their branch managers by purchasing blocks of tickets.

When prospecting, assign board members to contact the service clubs and organizations they belong to. Assign prominent business people to contact local companies – again, you’ll likely get better coverage and response. Depending on the type of event, the information you gather while prospecting may open many new doors.

For example, an event built around an art show, special exhibit, or a theatre or music performance will attract (or at least give you an excuse to contact) a whole new set of prospects. More information on this can be found in the BSA publication, Developing Prospects to Finance the Local Council.
VI. Major Special Events

There are many types of events that councils can use to generate additional income and good public relations. Some examples include: Art Shows, Antique Bazaars and Flea Markets, Auctions, Bowl-a-thons, Thrift Shops, Benefit Dances, Distinguished Citizen Dinners, Golf Tournaments, Theater Benefits, Tennis Tournaments, Movie Benefits, Fashion Shows, Horse Shows, and Pancake Breakfasts. The remainder of this manual covers the three most popular types of events.

VII. Auctions

Many councils have successfully used auctions to raise council funds. Most of them become annual events that get better each year, and become major sources of council income.

An auction has the potential to:

*Raise substantial income without conflict with other annual programs.
*Involve many new volunteers.
*Develop a constituency of new prospects.
*Provide fun and entertainment for participants.
*Expand public relations.
*Become an annual event with increasing revenue.

Success depends on four important ingredients:

1) Early planning, with attainable but challenging goals.

2) Many volunteers with very specialized areas of responsibility.

3) A great number of donated auction items that are marketable, valuable and unique.

4) A large number of event participants.

The quality of the donated items and a good attendance are probably the two most important factors. If you assume that $25,000 worth of auction items will gross $15,000 in bids from 150 buyers, the same items will likely bring $30,000 or more from 400 buyers.

Planning and Promotion

It takes months of planning to have a successful auction. Items to consider during the planning process include the following:

*Determine the gross revenue needed for the event to reach the target goal
*Will this be a standard "live" auction, a silent auction, or both?
*Set a date and confirm the location four to five months before the activity.
*Determine the selling price of tickets, tables, and underwriting.
*Recruit a professional auctioneer.
*Schedule regular committee report meetings.
Each ticket purchaser receives an auction catalog with a unique number. Participants use that number as their bidding ID (the numbers also help the council accurately match up bidders with their bids on check-out). Some councils include a dinner with their auction, and that often increases attendance.

Other promotional ideas include mailing auction newsletters and lists to those on the council’s mailing list, the previous year’s participants, etc. Ads placed in newspapers and the council newsletter are also effective, especially if you have one or two “big ticket” auction items to promote. Television and radio public service announcements are effective as well. Whatever it takes, one of the best ways to promote an auction – and ensure its success – is through strong advance ticket sales.

### Auction Steering Committee

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<th>Committee Role</th>
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<tr>
<td>General Auction Chair</td>
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<td>Sponsor Chair</td>
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<tr>
<td>Table Chair</td>
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<tr>
<td>Procurement Chair</td>
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<tr>
<td>Auctioneer</td>
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<tr>
<td>Council Finance Chair</td>
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<tr>
<td>Production Chair</td>
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<tr>
<td>Advisory Members</td>
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<td>Staff Advisor</td>
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### Volunteer Recruitment and Item Procurement

A successful auction will involve many volunteers recruited for various jobs. Workers should be assigned in three general areas: a) securing donations of items equal to the goal; b) ticket sales and promotion to assure a great attendance; and c) conducting the auction. Specific committee chairpersons will be responsible for publicity, press catalog and ticket sales, physical arrangements, and the finances. A large workforce ensures a better chance for success.

So who should you ask, and what should you ask for? Here are a few suggestions.

- *Scouters and executive board members*
- *Merchants and restaurants*
- *Professional people*
- *Food and beverage distributors*
- *Hotels and motels*
- *Friends of Scouting*
- *Sports figures*

### General Groups of Potential Auction Items

#### 1. Merchandise

- Appliances
- Hardware
- Furniture
- Rugs
- Clothing
- Luggage
- Bedspreads and quilts
Curtains and draperies

2. Antiques
   Furniture
   Glass
   China
   Oriental rugs

3. Art
   Original paintings
   Ceramics
   Prints
   Photographs

4. Services
   Legal--the writing of a will
   Dental checkup
   Physical examination
   Eye examination
   Car care
   Hairstyling for men and women
   Plumbing
   Photography
   Veterinary care

5. Food and Beverage
   Gourmet restaurant meals
   Fast-food coupons
   Beverages
   Candy
   Specialty boxes
   Locally grown fruit and vegetables
   Cheeses

6. Vacation Trips
   Trip to Hawaii
   Weekend in mountains
   Weekend at seashore
   Weekend in Florida
   Weekend at resort hotel
   Use of luxury automobile
   Weekend in VIP suite of local hotel
   Use of condominium or vacation home
   Fishing trip, airplane/helicopter ride, hunting trip

7. Sports
   Tickets to sporting event
   Golf lessons
   Tennis lessons
   Bowling lessons
Dinner at stadium club before game

8. Memorabilia and Collectibles
- Autographed football, baseball, basketball, soccer ball
- Shirt worn by professional ballplayer
- Equipment used by famous athlete
- Jewelry donated by famous person
- Books autographed by author
- Autographed record albums/compact discs
- Autographed photos of famous people
- First edition books
- Tie or clothes worn by actor or TV personality
- Scouting memorabilia

9. Events with Dignitaries
- Dinner with mayor and spouse
- Trip to state capital, including spending a day and having dinner with state senator, representative, or member of the state legislature
- Lunch with actor or radio/TV personality and personally escorted tour of studio

10. Unusual Items
- Arabian horse
- Electric car
- Motorcycle
- Whole hog
- Dinner for eight prepared by famous chef in your home, food included
- Use of car with prominent person as chauffeur

Arrangements

The location of an auction can "make it or break it." The event must be held at a convenient location with ample parking, and accommodates the easy arrival of merchandise and participants.

Some suggested locations include:

* Fairgrounds buildings
* Auditoriums with display areas
* Convention centers
* Armories
* Shopping malls after business hours
* Executive retreats and ranches

When staging the event, wherever it is held, consider these items:

1) Adequate lighting for both live and silent auctions.
2) Comfortable seating.
3) Food and beverage outlets.
4) Display area for auction items.
5) Public address system.
6) Auctioneer and helpers to show items.
7) Trucking firm to deliver large items.
8) Setup and cleanup crews.
9) Security to watch over donated items.
10) Police, fire, and first-aid personnel to monitor large crowds.

Other Types of Auctions

A popular type of auction is the "silent bid" auction. It's often held along with a live auction, as part of another fundraising activity (e.g. Scout show or FOS dinner), or as a stand-alone event.

In a “silent bid” auction, the auction items are displayed on tables; each item has a specific number, a minimum bid amount, and a bid sheet placed in front of it. Bidders walk around and put their names (or bidder numbers) and bid amounts on the bid sheets for the items they want. At a pre-announced time during the evening, bidding on the items is closed. The winner of the item is the bidder who placed the highest bid.

Consider having a “second chance” bid process as well. After the bidding has closed, and if some of the items haven’t received any bids, the first person who goes back to an item and places the minimum bid on the item gets it. This raises more money and, most importantly, reduces the number of auction items the council has to deal with at the end of the evening.

Financial Reporting and Follow-Up

The finance committee is responsible for properly handling all funds and following procedures for proper reporting and auditing. All cash, checks, and gift certificates should be adequately protected. Warehouse and storage space for the auction items should be in a secure area accessible only by committee members. At check-out, cashiers must handle money accurately and efficiently, and procedures for personal checks followed (such as approval of each check by a committee member).

Receipts and Donor Thank-You Letters

The ticket sales for an auction should be receipted just like any other event – they should include the date, the amount paid, and an estimate of the value received by the ticket buyer (the value of the meal, give-away items, etc.). Remember that the “value received” information may also be provided in the promotional materials for the auction.

But receipts for the auction items are a different story. For charity auctions, participants typically will not be entitled to a charitable income tax deduction for the amount they pay for the auction items. The IRS presumes that the amount paid for the auction items equals the value received by the participant (of course, in many cases, the value received by the bidder is even greater than what they paid). So there is no tax deduction – even if all the auction proceeds go to the council. *(For more information, see Section XII of this Manual)*

In most auctions, when participants check-out and pay for their items, they receive a print-out that itemizes their winning bid items and how much they paid. *(There are now some excellent software programs specifically designed to generate on-site auction receipts).* If not done on-site, these receipts can be sent immediately after the auction. This is a sufficient receipt for the bid items – just exercise caution about referring to tax deductions or calling payments “donations”.

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In rare exceptions, some donors may be able to claim a tax deduction for certain items – if the council has provided them an itemized list of bid items. For example, a $500 bid on a sweatshirt signed by a local college coach or athletic director, or a $2,000 bid for a dinner with a local news anchorperson, are likely worth far less than what the bidder paid for them. As always, claiming tax deductions is entirely the responsibility of the individual.

If receipts can’t be given out at the auction, include them with your “thank you” letters to participants. This is also a great opportunity to tell everyone about the success of the event.

Finally, the committee should prepare an “after-action” report, and present this report to the executive board with recommendations for next year’s event.

VIII. Distinguished Citizen Award Dinner

Fundraising dinners are held to honor prominent community leaders who:

* Have wide influence in the community
* Are well-respected in the community
* Identify with Scouting
* Can lend prestige to Scouting
* Are willing to share their influence on behalf of Scouting

Beyond the money they raise, these are great events because they often bring together many of the community’s top business and industry people and “power players” who are there to honor Scouting, the honoree, or both. It’s a great opportunity to involve people who would not otherwise be involved in Scouting. It also is an opportunity to upgrade (or get additional gifts from) current contributors who may not be giving at a level commensurate with their ability.

Organization

The structure, mechanics, and timetable are simple – but attention to details is vital to success. The Scout executive, council president, general chairperson, and key committee members must make some early decisions about the dinner. Choose an honoree who truly is a leader in the community; pick someone who does honor to Scouting by letting Scouting honor them. The honoree need not be directly involved in Scouting; it is sufficient if they have given leadership to other community endeavors.

The person honored must commit to certain obligations. Some of the things the honoree can do to make this a successful dinner include:

* The honoree has a voice in who sits on the dais or at the head table. Each seat is a paying seat, and many companies – especially businesses in the same industry as the honoree’s company – will buy one or more tables.

* The honoree should help determine who will handle the public relations. If the honoree’s company is going to handle the PR, you can bet it will be done well.

* The honoree shares his or her influence and “clout” to make the event a success for Scouting by involving his or her friends, business associates, etc.

Prospecting
A list of prospects should be carefully prepared, and as early as possible. People relate to other people, so the prospect list may itself suggest who the steering committee should recruit. The honoree’s friends and associates are prime prospects and may suggest others who could buy tables or become directly involved.

The prospect list should include: previous contributors, selected suppliers, customers, and contractors; alumni; political, fraternal, professional, social, and service club associates; country club or yacht club lists; directories listings; Who's Who directories; chamber of commerce lists; and industrial directories.

Consider those who are listed as supporting other tribute dinners (either for Scouting or others). The recipient's spouse may think of others to invite who aren’t on other lists, including friends from organizations they support. Honorary chairs are added for prestige (in fact, all previous recipients should be considered honorary chairs). This assures their continued support and the support of their special friends.

The Dais/Head Table

The dais or head table is reserved for the most distinguished people involved in the dinner. Each set is important (and in many cases, significant) so restrict this seating to the award recipient, the honoree's distinguished friends, honorary chairs, people on the program, and (if there’s room) event committee members. A special table for spouses may also be suitable.

Unused Tickets

Many people or firms will buy tables or tickets but may not use them. Good ticket control will reduce empty seats and the expenses of unused meals. Distinguished citizen award dinners are often a major social event of the community, attended by top leaders and their social peers. Maintain the reputation and prestige of the event. If a company purchases four tables but intends to use only one or two for its executives and special guests, discourage the company from handing out the extra tickets to general employees. Ask if they can be used by the Scouts participating in the program, or given to other special council guests.

Adequate planning ensures a successful dinner. Most councils with an annual dinner start making plans for the next year’s dinner immediately after the event. This helps tie in this year’s key personnel – while they’re still fired up about the current event – and helps you make decisions that could improve next year’s event before you forget.

Preparation before the first steering committee meeting is done with a few key people:

* Confirm the honoree.
* Recruit the general chairperson, executive chair, and any other key personnel.
* Confirm the keynote speaker, master of ceremonies, and honorary chair.
* Develop support materials and prospect lists.

Planning

The dinner can be organized in 60 to 90 days, but a longer period of time is desirable for adequate preliminary planning – especially for promotion purposes. The dinner should be held in the most prestigious place in the city. Make this dinner a real event – many people will come just because of where you’re having it (and, presumably, others will not come for the same reason, if you don’t choose the right place).
Experience shows that it’s best to hold the dinner on a weeknight. There are fewer conflicts, restaurants are more readily available, and it often costs much less to hold the event on a weeknight. This is all part of proper planning.

Position Descriptions:

**General Chair**

Selects and recruits committee chairs and general vice-chair (if necessary), and is responsible for developing dais and special guests. A top-caliber chairperson could be next year’s award recipient. Hosts and presides at steering committee meetings, develops personnel needs, and assists in recruiting steering committee members. Responsible for details of follow-through by steering committee members and coordinates efforts on prospects, public relations, ticket sales, physical arrangements, finance, and program with the Scout executive or the assigned staff advisor.

**Steering Committee Members**

Work together to follow through on general plans and format. Often, members are from similar industries, organizations, fields of interest, or geographic areas. Each steering committee member recruits or is assigned five sales people. Each sales person is expected to sell a minimum of one table with 10 seats.

Steering committee meetings should not focus on decisions about event details. The steering committee’s role is to recruit others and sell tickets. The committee will also make arrangements for a social hour or reception before the actual dinner. This gives everyone an opportunity to meet the award recipient, the honoree’s family and friends, and generally visit around. This social time is an important ingredient to success.

Other responsibilities of the steering committee include: personnel, prospects, ticket sales, kickoff, and follow-up. The steering committee meets weekly. Morning meetings are often best, so follow-ups can be done and reported back in the afternoon.

**Promotions and Publicity Chair**

This person should, if possible, be the director of public relations or an executive officer from the award recipient’s own company. This chair works directly with the general chair and Scout executive or staff advisors in developing brochures, press releases, and other promotional material, and contacting the media. This chair also plans and supervises releases to industry publications, organizational bulletins, etc.

**Record Keeping and Ticket Order Acknowledgement**

Good records are vital to prevent duplication and help build an accurate giving record on each prospect. ScoutNet will be extremely useful in this regard. These records include:

* Alphabetical list of prospects.
* Prospect assignment sheet by team and worker.
* Report sheet including prospect, date, number of tickets, and cash or pledge amount.
Ticket orders should be acknowledged upon receipt at the council office. Advise donors if tickets will be sent later. The following should be done upon receipt of each check or pledge:

1) Write a receipt

2) Acknowledge each with one of three types of letters:
   a) Pledge: thank-you letter with statement.
   b) Thank-you letter for contribution (no tickets): Donor not interested in the dinner but will make a smaller contribution.
   c) Ticket or table purchaser: Enclose tickets or advise when they will be sent.

3) Enter the contribution on the computer prospect list, check the accuracy of information, prepare an envelope for tickets, and mail tickets.

Materials

A sample checklist of items for the first steering committee meeting:

<table>
<thead>
<tr>
<th>Detailed schedule</th>
<th>Location/physical arrangements</th>
</tr>
</thead>
<tbody>
<tr>
<td>Letter of Agreement</td>
<td>Personnel list</td>
</tr>
<tr>
<td>Prospects list</td>
<td>Ticket order card</td>
</tr>
<tr>
<td>Information sheet for ticket sales people</td>
<td>Dinner ticket with stub</td>
</tr>
<tr>
<td>Develop dais list</td>
<td>List of recipients, friends, and associates</td>
</tr>
<tr>
<td>Send dais guest invitations</td>
<td>Send friends and associates invitations</td>
</tr>
<tr>
<td>Complete program info for honoree</td>
<td>Finalize timetable for dinner</td>
</tr>
<tr>
<td>Write script for participants</td>
<td>Honoree's award presentation</td>
</tr>
<tr>
<td>Gather props</td>
<td>Finalize layouts</td>
</tr>
<tr>
<td>Printed programs</td>
<td>Write instruction for dais guests</td>
</tr>
<tr>
<td>Complete seating arrangements</td>
<td>Assemble press kits</td>
</tr>
</tbody>
</table>

Budget Sheet

Develop a list of income, expenses, and net profit.

Sample Steering Committee Invitation

Write a draft letter including the name of the honoree and time, date, and place of steering committee meeting.

Master Timing Schedule

Develop a backdating sheet beginning 17 weeks from day of event. Include day of event responsibilities and agenda, and thank-you letters sent the day after the event.

IX. Golf Event

A golf event is a great and proven way to raise funds. It takes a lot of time, manpower, and expense to be successful (especially your first year!) But it’s a lot of fun, donors quickly look forward to (and plan around) future golf events, and just the planning of the event quickly builds spirit and enthusiasm among volunteers and professionals.
As with other special events, its primary purpose is to provide an additional source of funds to help support the local council, and sustain the positive image of the Boy Scouts of America. Some of the other benefits of the golf event:

* Attracts new leadership to the council or district
* Provides an opportunity to help participants better understand Scouting and its significance to the community and country
* It’s a way for businesses and individuals to support the council and have fun, fellowship, and competition
* Provides participants with the chance to win valuable prizes

Special Benefits

Depending upon circumstances, a golf event may also:

* Give participants the chance to play golf with local golf pros, touring members of the Professional Golfers Association (PGA) or other sports figures, or with local or national celebrities
* Give golf professionals a chance to play in a series of outstanding tournaments
* Give participants the chance to play on one of the area's finest golf courses (and often a members-only course they otherwise could not play)
* Give businesses a chance to invite preferred customers to the event

A ticket to the golf event may used as a prize in corporate and company sales campaigns.

Naming the Tournament

Consider naming the tournament to select an honoree with a well-recognized name. Try to select a "living legend," such as a renowned sports figure or entertainment personality, or a corporate executive who is well-known in the community.

It’s very helpful if a sports organization is strongly associated with the tournament. In Philadelphia, for instance, a tournament was named for Richie Ashburn, a retired baseball player who became an announcer for the Phillies. The tournament received a lot of support and attendance from the Phillies' organization. In Los Angeles, a tournament was named for Tom Flores, coach of the L.A. Raiders, and the Raiders' organization has done the same.

Setting the Date

Consider the following:

* Season/holidays.
* Scheduling of other tournaments.
* The schedule of the local professional sports teams (this will affect your chances of receiving support from the team or their players)
* Prestigious clubs are often more available on a Monday. Mondays also appeal to participants (a three-day weekend!).

Types of Golf Events

Several types of golf tournaments have been successful. Each type has its benefits, and the one you pick depends on your local interest and community.
**Amateur Tournament**

Recruit the general chair and committee chairs. The prospect sales committee sells foursomes (threesomes) to business and industry. Attractive brochures are mailed and used for promotion by this committee. Assign individual participants to foursomes (threesomes).

Secure golf carts for every two players. Set starting times for each foursome, or organize a shotgun start with foursomes assigned to specific starting tees.

As participants check in, guide them to the locker room. Then they can warm up, use putting green and driving range (if available), meet other participants, get golf cards, check in with starter, and pick up their scorecard and tournament giveaways (golf balls, inscribed tees, golf cap, golfer's towel, greens markers, etc.). At conclusion of the round, scorecards are turned in to either the scorer or the pro. Using established handicaps or the Callaway System, scores are determined. The winners are not announced nor are the scores posted until the dinner and awards ceremony.

This event has been the most popular. Amateur golfers are recruited through (and limited to) the necessary number of foursomes or individuals. The event may be split so that the first nine holes are played in the morning and the remainder after lunch, split between two courses (if the event location has multiple courses), or conducted as an 18-hole (shotgun start) afternoon event.

**Amateur Club Golf Day**

Posters are displayed for weeks in advance inviting members of a golfing club to compete for trophies on Scout Golf Day. A donation fee is established. Winners are presented their trophies at the club's annual awards night. There could be men's and women's divisions, and additional trophies may be awarded in selected handicap categories.

**Beat-the-Pro Amateur Event**

This is an event any council can conduct in every golfing club. Arrangements are made in advance for the resident pro to play a round. Then club members, using their established handicaps, compete against the pro's score. A committee from the club establishes the entry fee – all of which goes to benefit Scouting.

Trophies are awarded in the various categories, and a plastic disk is presented to all club members who "beat the pro." The disk bears the message "Beat the Pro," along with the words "Scout Day" and the date. (Disks should be large enough to be attached permanently to the member's golf bag.) The only expense is for posters, trophies, disks, and thank-you letters. The key to success is having an influential club member make it happen.

**Pro-Am Team Event**

This event teams a trio of amateurs with a member of the PGA. Threesomes are sold to business and industry, and in some cases individuals pay their own participation fees. Prizes are awarded for professionals (cash) and amateurs (merchandise or gift certificates). Usually, there are prizes for the four-player best ball, low-gross professionals, low-gross amateurs, low-net amateurs, and for special events.
This event attracts amateurs who not only will enjoy the golf match, but will receive 18 holes of playing instruction from the pro. The pro, after all, is a member of the team and will profit by the amateurs' success.

Some of the same procedures are used for the all-amateur event. A local teaching pro becomes a member of the committee. Knowing the established schedule of golfing events in the area, the pro selects the best date (usually a Monday) and helps line up a course that will be a challenge to both pros and amateurs. The pro recruits professionals by using prize money as the main drawing card.

An enthusiastic participant sales team recruits threesomes. Here again, basic sales are to business and industry, with individuals completing the number established as a goal. Sponsorships also can be sold.

Hold a drawing to team up one professional with three amateurs. Do this before the actual date so that the chart of teams can be determined, and all amateurs can be notified who their playing partners will be.

Give cash prizes to professionals (often all pros receive some cash) and arrange merchandise prizes for amateurs.

**Celebrity-Am**

This is a variation of the pro-am team event. In a celebrity-am tournament, three amateur golfers play with a local politician, entertainer, or sports celebrity. The key is getting celebrities. Expenses to secure a celebrity can be excessive, and the celebrity's availability may be unreliable.

**Additional Skill Events**

Many tournaments spice up the activity by conducting special events: the closest to the pin on a par-three hole; the longest drive on a long straight fairway; or the first hole-in-one on a specified hole.

**Exhibitions**

Some golf tournaments have combined competition in the morning with an exhibition by leading professionals in the afternoon. However, exhibitions may end up being costly – the rate for golf professionals can be expensive, and their availability can be unpredictable. Also, additional volunteer workers may be needed for crowd control.

A touring professional plays with local amateurs, or in some council events four pros play. To be successful, a major sales effort is needed to sell gallery tickets because it is expensive. Major publicity must be planned well in advance. A press party and possibly a special preview party for tournament sponsors and players should be held the evening before.

An exhibition can be combined with tournament play, with one taking place in the morning and the other in the afternoon. A guest pro player usually is the speaker at the awards dinner. Scorekeepers will be needed, as well as large scoreboards to keep the gallery informed of each player's score as the players tour the 18 holes.

**PGA Tour Receipts**
A few councils are fortunate to receive profits from some of the major tournaments on the PGA tour. At these events, after expenses and prize money are paid out, the rest goes to local charities. Most of these are established events and the same councils have benefited for years. This may change only as new events are established or as current charities drop out. An important consideration is how much volunteer involvement is required in exchange for the contribution.

Organizing a Golf Event

The key to a successful golf tournament is a well-planned and fully staffed committee. An enthusiastic chairperson (perhaps someone from your executive board or the community) who is a "golf nut" is essential. The chairperson should be well-recognized and well-respected in the community. The ability to inspire people to work to generate some great publicity is also a vital characteristic for success.

All types of golf events use similar committee structures and operations. Selling spaces in the tournament is most important, but budget control is a close second (to make sure that "sales minus expenses" is a large, positive number). The best way to sell the event is by foursomes (or threesomes for pro-ams). Sales teams assigned to various business categories such as banking, real estate, engineering, etc., should generate the majority of the income. The committee must decide what the fee should be, and look into what other local charities charge for their tournaments. You don’t want to undercut the prestige of the event by making the fee too low.

Once the type of golf event is chosen, another consideration is when the golf course is available. Sometimes a course is reserved for a full day for the event; for others, only a half day is available. A full day gives the schedule a great deal more flexibility.

The number of foursomes you can accommodate is based on when golf course is available, and whether you use a shotgun start or a scheduled start. The latter has all foursomes teeing off from the first tee, with a few minutes between groups. The shotgun start puts a foursome on each of the 18 tees, and everyone has the same starting time. Each group plays 18 holes, but they start and finish in different locations. For example, the foursome that starts on the 12th tee will finish its 18 holes on the 11th tee. If there are more than 18 foursomes (not that unusual), a second foursome can be put on the longer holes and start when the first group on that hole is out of range.

Regardless of the type of start or overall program, there are many jobs to be done. Important positions to fill, in addition to general chairperson, include: participation (prospect) sales, arrangements, awards and prizes, special events, rules, volunteers, sponsorship, budget, and publicity. Depending on the size of the event, some of these jobs may be divided into subcommittees and others added. One person must be responsible for the budget and finance operation. A staff member should serve as adviser to the committee.

The committee should:

* Be large enough to do the job properly.
* Include professionals from various areas to provide the necessary resources and contacts; for example, from an advertising agency, sports business, etc.
* Properly utilize the individual strengths and areas of expertise of the various members. For example, a high-level executive who can get to the "movers and shakers" – is the preferable choice for sponsorship chair.
While all members have their individual areas of responsibility, good chemistry among them is important. You’re creating a team. The committee should meet once a month until three months before the tournament. Meetings should then go to twice monthly. Consider the following:

* An organization that the celebrity or honorary chair is already associated with should be involved – try to have two or three of its staff members on the committee. Most organizations are happy to add their name to events and get some extra publicity if the affair is first class and the top executives are properly involved.

* Corporate involvement is an asset – have at least one major local company accept the majority of the responsibility. The general chairperson should come from this company and have a position in the company (and in the community) to get the job done quickly and efficiently. Many companies even have staff members who already have these types of responsibilities and can help out. Corporate sponsorship also generates effective promotion among the company's vendors.

* Involvement by the media is a must. Newspapers, television, and radio should all be represented.

**Position Descriptions:**

**General Chairperson**

* Recruits all committee chairs and requests regular reports on progress.
* Assists in the recruitment of honorary chair or honoree.
* Hosts and presides at steering committee meetings.
* Assists with securing event sponsor.
* Takes an active part in the entire event including the awards dinner.
* Keeps the committee intact, on schedule, and motivated.
* Sends invitations to special guests and celebrities.
* Reports regularly to the council executive board on progress.
* Conducts evaluation meeting following golf event.
* Coordinates sending thank-you letters after the event.
* Hosts evaluation luncheon.

**Arrangements Chair**

* Recruits necessary personnel.
* Selects country club (with the general chair) and assists in setting the date.
* Confirms facilities for sponsor dinner (if held), post-tournament gathering, and awards dinner program.
* Arranges for golf carts and caddies.
* Is responsible for locker room arrangements, meals, parking, bag drop area, and relationships with the club pro.
* Maintains close working relationship with the general chairperson.
* Sets timetable for meeting all commitments, including takedown and storage.

**Participant Sales Chair**

* Recruits a committee of sufficient stature and size to attain the participation goal.
* Is responsible for developing prospect lists.
*Coordinates business, industry, and organization sales of threesomes (or foursomes).
*Confirms registrations and assigns participants to foursomes.
*Presides at committee meetings, receiving reports and redistributing potential prospect materials as needed.

**Prizes and Awards Chair**

*Works with the general chair and committee; establishes prizes to be offered in all categories, e.g., best overall team, individuals, longest drive, closest to the pin, etc.
*Secures hole-in-one sponsorship.
*Secures all prizes through purchase, project sales, gifts, or gift certificates
*Assists general chair with presentation of awards.
*Arranges for distribution of checks to professional winners at the end of the event. If possible, checks should be presented at the awards banquet.

**Special Events Chair**

*Arranges with local golf professional to conduct golf clinic.
*Recruits master of ceremonies for post-tournament gathering.
*Secures auction items for evening program.
*Recruits adequate volunteer personnel to handle auction.
*Assists with developing program for awards banquet.

**Publicity Chair**

*Recruits personnel to arrange the necessary advance publicity.
*Maintains relationships with radio, television, and the press to secure maximum exposure for the event and Scouting.
*Assists the printed-program chair with production.
*Serves as an adviser to the committee for all printed materials to generate the greatest impact.
*Invites and hosts special guests and media at the event site. Provides a press kit for those present.
*Arranges for a photographer to be at the event.
*Provides the media a list of winners as soon as the names have been determined.

**Budget Chair**

*Prepares and administers the event budget.
*Approves all income and expenditures.
*Keeps accurate records of all income and prepares information for future reference.
*Makes final report on financial status of the event.
*Continually reminds other chairpersons that the purpose of the event is to raise money, not to spend it for items that will not help produce a profit.

**Refreshments Chair**

*Arranges for securing, delivery, and dispensing of all refreshments.
*Arranges for necessary food handlers’ permits.
*Secures refreshments for before and during golf.
*Arranges for refreshments for the post-golf gathering before the awards dinner.
*Project-sells refreshments.
Dinner/Luncheon Chair

* Arranges for complete details of meals at the event: room, head table, seating arrangements, menu, time schedule, display table for prizes, detailed meal cost and extra charges, waiter instructions, seating, decorations, microphone, lectern, etc.
* Cooperates with the general chair in support of program features at the dinner.
* Helps the general chair secure a master of ceremonies, guest speaker (if needed), and entertainment; provides hosting, parking, etc.
* Assists the prizes and awards chair to ensure that the ceremony runs smoothly.
* Cooperates with the publicity chair on arrangements for photographers.

Carts and Caddies Chair

* Arranges for golf carts and/or caddies for each twosome.

Parking Chair

* Arranges adequate parking for all participants, committee members, and guests, and secures valets or security personnel if necessary.
* Recruits Scouts or Explorers, as necessary, to help with parking, carrying bags, attaching special tags, etc.

Housing Chair (if needed)

* Meets out-of-town participants and arranges reception, housing, meals, and transportation.

Cleanup Chair

* Recruits enough personnel to restore the golf course to its pre-event condition.

First Aid Chair (if needed)

* If there is a spectator gallery, recruits personnel to staff a first aid area.
* Makes arrangements for emergency ambulance, physician, and hospital care.

Gallery Sales Chair (needed if an exhibition is part of the event)

* Appoints vice-chairs (or captains) to recruit enough team members to sell gallery tickets.
* Works closely with the publicity chair to provide news articles, fliers, posters, etc., that will stimulate sales.

Printed Program Chair

* Decides on format to be used and establishes budget for the printed program.
* Arranges for printing.
  * Is responsible for copy and photos; assists with layout.
  * Works with the club golf pro to secure necessary course information.
  * Works with the sponsorship chair to give program credits to underwriters
  * Recruits a committee to sell advertisements for the program.

**Sponsorship Sales Chair**

* Recruits a committee to "sell" each of the 18 holes.
  * Establishes a price and sponsor benefits in return for underwriting
  * If a sponsor dinner is held the night before, assists with program and arrangements.
  * Arranges for sponsor recognition (billboards, corporate flags or signs for each hole, photographs, print ads, recognitions, dinner tickets, etc.).

**Handicap and Scoring Chair**

* Receives handicaps of all participants or helps establish them
  * Establishes rules of play.
  * Prepares scoring information sheet to be given to participants.
  * Supervises the blind drawing for professional or celebrity assigned to each threesome (if this type of event is used.)
  * Is in charge of setup for hole-in-one competition and other special events, and also assists with hole assignments for shotgun start.
  * Receives scores at the end of play and determines winners in various categories.

**Souvenirs Chair**

* Secures appropriate souvenirs items for all participants and secures golf balls, tees, greens markers, towels, caps, etc.
  * Arranges, if possible, to project-sell the items.
  * Arranges with starter for distributing the items.

**Marshals Chair (if gallery crowd is sold)**

* Consults with golf pro to determine how many marshals and supervisors are needed.
  * Has areas roped off along the course for control.
  * Trains supervisors and marshals for their responsibilities.
  
**Note:** Well-trained Scouts or Explorers can be used effectively, and the uniform adds to the public relations value of the event.

**Reception Chair**

* Welcomes all participants and assists them in finding the locker room, etc.
  * Arranges for the hosting of participants who have completed their rounds before the refreshment hour.

**Local Golf Professional (in the case of a pro-am event)**

* Determines the best date to attract other teaching pros.
*Selects the golf course that will attract the most teaching pros.
*Is responsible for recruiting other golf pros.
*Works with the prizes and awards chair to determine the prize money available for the pros.
*Arranges for awarding to amateurs merchandise coupons (if this system is used) to be redeemed at the pro shop.
*Serves as adviser to the entire golf event committee.

For some types of events or for large tournaments, some of these responsibilities may be broken into individual committee assignments. Usually, only one council staff member is assigned to this event through all stages of the preparation, but additional staff members may be involved the day of the event.

**Sample Event-Day Schedule**

- Registration opens -- 11:00 a.m.
- Buffet lunch -- 12:00 p.m.
- Shotgun start -- 1:00 p.m.
- Post-golf celebration -- 5:30 p.m.
- Banquet and awards ceremony -- 6:00 p.m.

**Tips for a Successful Golf Event**

**Date and Location**

Schedule the date and location well in advance. Establish and announce a "rain date." This is particularly important in the case of a pro-am event. Except for events restricted to members and guests of one particular club, golf events generally are conducted on a weekday.

Watch for any local scheduling conflicts or other community events that could interfere with potential participants. Try to avoid any conflicts with major sports events, or with any national or religious holidays.

**Event Costs**

The participant fees must be in line with “what the market will bear”. But don’t underestimate what people will pay – they may pay more than you think, and you certainly don’t want to “cheapen” the event. The fastest way to selling out is to sell foursomes to local businesses or industries (or threesomes for pro-ams). Most successful tournaments have a minimum participation fee of $100 per player. Some long-established, top council golf events sell out months in advance for $2,000 or more per foursome.

Business sponsorship of a hole is based on the value offered. Most councils successfully charge thousands of dollars per hole, and some of the recognition ideas include: a miniature recognition billboard at the tee ("This hole sponsored by the XYZ Corporation"); a full page ad in the program; tickets; recognition at the awards dinner; a pennant attached to the flag stick on the green for each sponsored hole.
Participants from these firms have paid extra to play in the competition. To quote one Scout executive: "As in the past, we could attract as contributor participants those companies that have been unable to contribute to the council because of a corporate policy against giving to organizations that are part of the United Way. The tournament provides an opportunity and a method of appealing to business expense and advertising budgets of corporations. The Public Relations this event generates is outstanding, and presents excellent opportunities to communicate with the top business leaders."

In some events photos are taken of each group and sent with a thank-you note.

**Group Makeup**

When individuals sign up with no preferences of playing partners, the committee selects the playing group.

**Publicity**

Publicity is vital to a successful event, and helps the entire Scouting program as well. If celebrities are a part of the event, publicity is a natural.

Make sure the winners get publicity. For radio and TV coverage, tournament results must be phoned in to local stations so the news is timely and makes the sportscasts on the day of the event. Photographs taken and used by the press are an excellent follow-up to the event. A series of photos also can be taken and used for promotion the following year.

**Prizes and Awards**

When selecting cash prizes for professionals, have the golf pro consult with and assist the committee. Cash prizes go to professionals for the individual low gross and for the team competition (four-player best ball and/or two-player best ball). Prizes also may be offered to pros for the closest to the pin on a par-three hole and longest drive on a challenging hole.

Amateurs should get either merchandise prizes (set of irons, set of woods, a bag, or golf balls) or a merchandise certificate redeemable at the pro shop. Some tournaments have awarded a prize with the option that a prize of comparable value can be selected from the pro shop. Amateurs often award prizes for: individual low net, four-player best ball and/or two-player best ball, individual low gross, closest to the pin, and longest drive.

The team competition in a pro-am event is essential. Remember, golfers will contribute to Scouting through a golf event for the privilege of playing golf with a pro, and getting a little golf advice along the way.

Determine how many prizes you’ll give out in each category. Also, consider presenting small statuettes to each pro and amateur with their prizes. These will often be displayed, while a prize check or golfing equipment won’t be.

**Amateur Handicaps**

In many amateur tournaments, the following statement is part of the rules: "Amateurs are requested to have properly verified handicaps. The Official Callaway Handicap System will be used for those amateurs without verified handicaps."

**Additional Recommendations for Success**
1) Secure corporate support to assist in recruitment of steering committee members, honorary chair, and participants.
2) An all-amateur event is easier to manage than a pro-am, and can be just as successful.
3) Ask a local club professional to conduct a golf clinic prior to tee-time.
4) Use a shotgun start and a "best ball" format. If necessary, have an "A" team and a "B" team at each hole for the start.
5) Ask a local car dealer to provide a new car as the prize for a hole-in-one on a designated hole. Have the car on display at the tee for that hole. The car dealer pays the cost of the insurance policy that pays off in case of a hole-in-one. Resource: National Hole-In-One Association, 1-800-527-6944.
6) Conduct a sports memorabilia auction as part of your post-golf activities. Offer golf clubs, sports tickets, etc., for auction. Arrange for a local television or radio personality to serve as master of ceremonies and auctioneer.
7) Secure hole sponsorships for a minimum of $100 per hole; list sponsors in the printed program and post signs at the designated holes.
8) Sell ads in your printed program. If possible, list all participants, sponsors, steering committee members, and special guests. Don't forget to spotlight Scouting.
9) Use Scouts in uniform to assist with registration and the bag drop area. A few may be needed later as runners. However, their services generally are over after tee-off time.
10) Don't "nickel and dime" the participants. Set the fee high enough to cover miscellaneous items (bag tags, refreshments, snacks, etc.) or get them underwritten.
11) Make sure your facilities for the post-golf gathering are adequate.
12) Arrange for a photographer to take pictures of each foursome (include a sign with the name of the event), and make provisions to mail them to participants.
13) Keep prizes to a minimum. Recognize the best foursome, closest to the pin, longest drive, and other special contests. Note: Each participant should receive a special souvenir as a part of his/her registration fee. Examples include a golf umbrella, stadium seat, golf shirt, or club covers. Have sponsors cover the cost of these items.
14) Additional giveaways (tees, balls, hats, etc.) are always welcome and can be handed out at registration.

Other suggestions for successful golf tournaments include:

1. Held on Monday
   * Course is likely available.
   * Participants get a three-day weekend and still conduct business at the tournament.

2. Nicest and most exclusive club
   * Never at a public course.
   * Instant status; everything is first class.

3. Annual event with Prestigious Reputation
   * People want to play.
   * Not dependent on one personality.
   * Celebrity/BSA, e.g., "John Adams/BSA Tournament":
     -- High-powered chairman.
     -- "Fivesome" – coach or player with each foursome.
     -- The draw is coaches, players, and chairman.

4. Not less than $100 per entry
   * Two foursomes per hole.
*Reducing entry fee does not increase participation.
*Project-sell:
  -- a banquet or lunch
  -- Holes (Buy green and tee for discount price – $5,000 for both, or $3,500 each and set up corporate exhibit at tee. Green and tee sponsors receive one foursome and page in program.)
  -- Green and/or Tees
  -- Reception
  -- Program
  -- Halfway house (refreshments)
*Live auction following banquet:
  -- Sell experiences (trips, vacations), not items.

5. **Best ball foursome** – Participants have lots of fun.

6. **Golf committee**
   *Vice-chairs include:
     -- Green sales
     -- Tournament director (details of club and course)
     -- Auction

7. **Tee package given to each participant**
   *Shirt/Shoes
   *Hat Balls
   *Tees--divot spike
   *Bag cover with logo

**Work Schedule**

Because of the different types of golf events, each council must develop its own backdating schedule. Listed are the elements that should be considered in planning the schedule:

*Recruit general chairperson.
*Select type of golf event.
*Set date.
*Arrange for location.
*Recruit committee chairs.
*Recruit prospect sales team.
*Recruit sponsorship sales team.
*Recruit needed committee and service personnel.
*Schedule committee meetings.
*Secure costs for banquet, refreshments, greens fees, caddies, carts, print material, etc.

*Determine items to be project-sold.
*Determine participant fee.
*Set tournament format and prizes.
*Secure celebrities and entertainment, if used.
*Plan banquet menu.
*Make arrangements and secure items for auction at awards banquet.
*Determine banquet program and make arrangements.
*Mail invitations to prospects.
*Establish schedule for printed program.
*Set dates for all printed materials to be designed and delivered.
*Schedule publicity releases.
*Arrange for involvement of golf pro(s).
*Set blind drawing date for pro assignments (pro-am event).
*Establish tee-off schedule.
*Secure and assign carts/caddies.
*Secure refreshments.
*Have prizes and giveaways on hand.
*Set the schedule for the day of the golf event.
*Arrange for publicity during the event.
*Send thank-you letters to participants, club, golf pro, program advertisers, sponsors, contributors, and committee.
*Issue final financial report.

Procedures in Brief

A social hour is available to participants before dinner. This banquet is a light-program event. A speaker could be part of the program, but this is optional. Entertainment by musicians or comedians is scheduled at some award dinners. Awards are presented to winners and runners-up in low gross, low net (additional places can be recognized if the budget allows), top teams, longest drive on challenging hole, and closest to pin on another hole. Some councils conduct an auction during the program, generating additional income. Dinner could conclude with the announcement of the following year's event date, location, and chairperson.

A dinner held the evening before the event and attended by the event sponsor, hole sponsors, committee, and celebrities is an added feature providing recognition for those in attendance, and further increasing income to the council.

Hints From the Successful

*Don't set your price for participants too low. You may find it difficult to increase in later years.
*Develop a detailed budget. Don't spend 75 percent of your income for expenses. You should net a minimum of 70 percent. Remember, the participants are giving money to Scouting – not to the expenses of the event.
*If you don't capitalize on this event with good publicity – for both the event and Scouting – you're losing out
*Trying to get the “brightest star” on the touring pro circuit for an exhibition is not always the answer. These men and women are under contract, and the fees for their services are high.
*Don't overestimate the number of gallery tickets you can sell. One council was assured that 10,000 gallery tickets could easily be sold. Only 2,000 were sold, resulting in a budget loss on that item.
*Select a prestigious golf course that is challenging for highly skilled players.
*Secure from the honoree: Christmas or holiday card list; names and addresses of vendors, suppliers, and competitors; club lists, such as the honoree's country club; names of directors of the honoree's bank; rosters of organizations and associations the honoree is active in; and names and addresses of corporate board members and key corporate employees.
*As soon as possible submit a picture of the honoree, with several youth members and the general chairperson, to the local paper. *All correspondence must be on the stationery of the chairperson. Send copies to the honoree. Or use special stationery with the names of committee members down the left side.

Sample Prospect Request Form

Mail to:
Takeany Council
Boy Scouts of America
Address
City, State, Zip Code
Fax:

Prospect Request Form

Please check the following prospects against the "master" file. I understand prospects should not be contacted until approval (written or verbal) is given to me. (Please type or print information below. Keep the yellow copy.)

Worker’s Name _______ Division _______ Team _______ Phone Number _______
Council Approval _______
Name of Company _______
Contact Person _______
Company Address _______
City _______ State _______ Zip Code _______
Phone No. _______

Worker’s Name _______ Division _______ Team _______ Phone _______
Name of Company _______
Contact Person _______
Company Address _______
City _______ State _______ Zip Code _______
Phone No. _______

Sample Registration Form:

XX Annual Boy Scout Invitational Golf Classic
Register yourself and/or your foursome. Entry fee $00 per player. Please print all names and addresses.

Player No. 1/Team Captain
Name: _______
Address: _______
City/Zip: _______
Handicap/Avg. Score _______
Phone: _______
Dinner: Yes _______ No _______
Player No. 2
Name: ________
Address: ________
City/Zip: ________
Handicap/Avg. Score ________
Phone: ________
Dinner: Yes ________ No ________

Player No. 3
Name: ________
Address: ________
City/Zip: ________
Handicap/Avg. Score ________
Phone: ________
Dinner: Yes ________ No ________

Player No. 4
Name: ________
Address: ________
City/Zip: ________
Handicap/Avg. Score ________
Phone: ________
Dinner: Yes ________ No ________

Enclosed is $______ for each participant.
Please bill each participant.
Please bill me for all participants.

I will not be able to attend. Please accept my donation of $_______.

Sample Letter to Past Participants

Your Letterhead

Dear ________

On behalf of all of the Boy Scouts who will be attending summer camp this year; please accept our thanks once again for participating in last year’s Boy Scout Pro-Am Golf Classic.

We hope you will plan to participate in this year’s tournament, which is scheduled for June XX, 20XX. We are returning to the ________ Golf Club in (city) for our sixth straight year. This year’s program will once again feature a pro or celebrity like ________ with every team.

I have enclosed a brochure that covers the basic details of the event. Play will begin with a 1 p.m. shotgun start. The entry fee of $1,250 covers your team’s registration, gifts, lunch, greens fees, and carts. A steak dinner will follow the tournament, with prizes and awards as well as an auction. You get a lot for your team fee.

Please take a moment to consider how you can participate this year. There are a variety of projects listed in the brochure. We also can use door prizes and items for the auction. Please contact me at (chairperson’s phone number) or call the council service center at (phone #). I look forward to hearing from you and seeing you at the course.
Sincerely,

Your Name

Your Letterhead

Dear ________:

You can help make it possible for Scouts to enjoy summer camp this year, as well as participating in the Scouting program throughout the year. More than 18,000 youth will be served this year by the Takeany Council, Boy Scouts of America.

You can help make it possible by planning to participate in the **Celebrity Boy Scout Pro-Am Golf Classic** on June XX, 20XX, at the Golf Club of (city). This exciting course will bring you a taste of golfing in Scotland as you support Scouting. A pro or celebrity will be assigned to your foursome to help create a special round of golf.

I have enclosed a brochure that covers the basic details of the event. Play will begin with a 1 p.m. shotgun start. The entry fee of $1,250 covers your team's registration, gifts, lunch, greens fees, and carts. A steak dinner will follow the tournament, with prizes and awards as well as an auction. All of this is yours for one fee.

Please take a moment to consider how you can participate this year. There are a variety of projects listed in the brochure. We also can use door prizes and items for the auction. Please contact me at (chairperson's phone number) or call the Takeany Council service center at (phone #), if you have any questions. I look forward to hearing from you and seeing you at the course.

Sincerely,

Your Name

X. Tips for Making the Special Event Successful

1) Date stamp all incoming reservations to keep track of the order of responses.
2) To enhance the success, set up 10 percent fewer seats than you anticipate needing. Then be prepared to rush additional seats in as they are needed.
3) If you offer tickets at various price levels, estimate the number of the most expensive seats you expect to sell and then increase this number by 15 percent. Intermediate-price seats most often do not sell as well as anticipated.
4) Always offer invitees the option to make a contribution in lieu of attending the event.
5) It is required that the council specifies on the invitation or ticket – or in the promotional material – what portion represents the value received by the donor.
6) Be sure to always do invitational mailings. The first mailing should go out a full six weeks before the event; the second should be mailed two weeks prior to the event. The first mailing will account for 85 percent of participants. The second mailing will attract the other 15 percent.
7) Include in the second mailing a list of the names of those who signed up because of the first mailing. This will prompt "fence sitters" to respond to the second mailing.
8) Always mail your invitations via first class mail using a postage stamp. (Many people ignore mail with metered postage.) Include your return address on the back.
9) Always include a return-reply envelope for the event response form. Consider including postage on the reply envelopes.

XI. Basic Principles

The universal dynamic is clout. The success of a fundraising event will depend upon prestige – the clout of the chairperson and the honoree. The fact that big people raise big money cannot be overstated.

Sources of Clout

* Prestige of the chairperson and honoree
* The corporate affiliations of the chairperson and honoree
* Money – old, new, and other (financial institutions and foundations)
* Purchasing power, retail or wholesale

The finance truism, "People do things for people," definitely applies to special events.

The Honoree

Do extensive research to determine who the best person is to serve as honoree. Some councils have had excellent experiences by selecting the honoree first and asking the honoree to choose the chairperson and vice chair.

XII. Charitable Deductions and Special Events

Normally, your donors receive a charitable contribution income tax deduction for the full value of their gift to the council. That's not necessarily true when your council has a special event. Your donors aren't just making a gift – they're getting something of value in return, whether it is entertainment, a meal, a golf game, an auction item, etc. Because of this, many special event donors must reduce – or may not even be entitled to – an income tax deduction.

The General Rule

If a special event donor receives something of value in return for buying a ticket to your event or participating in it, the donor must reduce his or her tax deduction by the value of what he or she receives. The donor's tax deduction is the difference between what the donor pays to the council and what the donor receives in return from the council. It is irrelevant what the event costs the council, or how much the council receives from each donation.

Example 1: The council has a recognition dinner and charges $100 per ticket. The value of the dinner is $40 per person. Each donor may deduct only $60, the difference between the ticket price and the value of the dinner.

Example 2: The council has a golf tournament at a local club and charges $150 per participant. Each person receives greens fees, cart, lunch, and assorted giveaways, worth a total of about $80 per person. So $70 of each entry fee will be tax deductible.

Example 3: The council has an auction and a board member is the high bidder on a "getaway weekend" package. The bid was $180 and the package is worth $400. The board member will receive no tax deduction for his "gift."
This rule is enforced by the Internal Revenue Service even if a donor buys a ticket to an event and doesn't use the ticket, does not attend, or gives it to someone else. The test is not whether a donor actually attended the event, but whether the donor had the right to attend. The only way for a donor to get a tax deduction for the full amount paid for a special event ticket is to give the ticket back to the council or give it to another charity for their use.

Again, this is true regardless of the council's cost in putting on the special event, and even if every dollar raised by the event goes to the council. The test is not what the council receives or how much it spent on the event (or didn't spend), but how much value the donor receives in return for the gift.

If donors buy tickets for a drawing or prize, the IRS assumes that the chance of winning a prize is, in fact, the fair market value of the ticket. Thus, no tax deduction will be available for ticket purchasers in this situation (of course, BSA Rules and Regulations prohibit raffles and games of chance, so proceed with caution in this area). Similarly, a winning bid in an auction is presumed by the IRS to be the fair market value of the item received.

If, in return for a gift, the donor receives from the council items with insubstantial value (also referred to “token benefits”), the donor need not reduce his or her charitable deduction at all. For 2004, this means that a donor need not reduce his or her tax deduction if the gift is: (1) more than $41.00 and receives items or benefits that cost, or would have cost the council less than $8.20 to buy the item, or (2) receives items or benefits worth less than either 2 percent of the gift amount or $82.00 (whichever is less).

If one of these two conditions is not met, the donor must reduce his or her tax deduction by the actual or presumed value of the benefit received. These limits change every year, but councils are informed about the changes as the IRS makes the figures available. Note that recognition plaques are considered by the IRS to be items of "insubstantial value, regardless of their cost or value.”

A donor may, of course, receive a full deduction for goods and property donated to the council for use or sale at a special event. The general rule is that corporations and businesses may deduct the basis or inventory cost of the goods and property donated to the event – individuals may deduct the full fair market value of the items.

Councils should not attempt to value a donor's contribution; they are not in the appraisal business. Gift receipts should describe the donated property, but not value it. Also, a donor will not be allowed a tax deduction for the contribution of either personal services to the council, or for the use of property (e.g., contributing to the auction one free hour of legal consultation, a free dental check-up, or use of a vacation property for a week).

**Council Responsibilities to Inform Donors**

When sending out information about your special event, the IRS requires that the council state the approximate value of what a donor receives in return for his or her gift, ticket or entry fee, and a description of the goods and services received. If no value will be received by a donor, or if the value is insubstantial, this must also be stated.

“Value received” information can be included in the promotional brochure, on the ticket or receipt, in the dinner program, or anywhere else that your donors are likely to see it. If you do not provide this information in your solicitation materials, then you must send receipts containing this information to all participants. Sample receipts are currently available in the council's fundraising software program.
Example 4: A promotional brochure for the golf tournament in Example 2 tells prospective players that they will receive greens fees, cart, and lunch, and that the entry fee will be $150. The brochure should also state "approximate value received per person is $80," and describe what participants will receive. If it doesn't, separate receipts with this information must be sent to all participants.

Establishing the value received by a donor is not an exact science. The IRS requires only that the council make a "good faith effort" at trying to establish a value. The council will not be penalized if it undervalues an item or service. It could be penalized, though, if it does not even attempt to value it. Also, if the council does not provide this information, the IRS can deny the special events donor any tax deduction for the event, and penalize the council for noncompliance. Of course, if your special events donors are audited or refused tax deductions for participating in your events, you shouldn't count on them to participate in future events.

The value is usually determined by comparing the special event to similar events that charge admission, or with commercial businesses that offer the items or privileges for sale. If the council is having a theater or concert benefit, the value received is what it normally costs to buy a ticket to such an event. For a golf tournament, the value is the usual charge for greens fees, cart, etc., at the particular club where the event is being held. For dinners, it's the approximate cost of a meal at that hotel, club, or restaurant. If the council is offering something for which there is no comparable commercial value, a reasonable estimate of the item or admission value will suffice.

When a donor contributes something to the council for use or sale at the event, the council should not place a value on the donor's gift. Again, the council is not a qualified appraiser. The council should only offer a receipt that identifies what the donor has given the council. It is the donor's responsibility to provide the IRS with an appropriate value on donated property.

Example 5: A donor gives the council a Sony 50-inch rear projection television for a silent auction. The council should give a receipt or letter thanking the donor for the gift of "one Sony 50-inch rear projection television." The receipt or letter from the council should not value the item.

It may be necessary for donors who contribute goods or products to the council to fill out IRS Form 8283, proving the deduction. This usually is true for any non-stock gift of property worth $500 or more. Though this is the responsibility of the donor and his or her tax adviser, you may want to mention this or even keep a supply of these forms on hand to give to your donors, as a goodwill gesture. (The forms are free from the IRS at www.irs.gov.)

Further Information

The definitive word on this subject for councils and other charitable organizations can be found in from the IRS at www.irs.gov. In particular, consult IRS Publications 526, 561, and 1771. Also, contact the Finance Impact Department the national office to discuss particular situations or questions relating to these matters.

Additional Information

If you would like more information, or samples of the documents listed below, please call 972-580-2333 and request the information or mail to:
Samples of the following fundraising items are available:

- Distinguished Citizen Dinner Award
- Auction
- Bowl-a-thon
- Fishing Tournament
- Capital Campaign
- Project Sales Campaign
- Grant Writing Proposal
- Job Descriptions
- Recruitment Letters
- Backdating Schedule

- FOS Campaign
- Golf Tournament
- Bike-a-thon
- Eagle Dinner
- Direct Mail Campaign
- Annual Report
- Finance Newsletter
- Invitations
- Timeline
- Promotional Brochures

Many other samples are available as well. You may also access most of this information through the FID Web site, www.scouting.org/financeimpact.