

SCOTTISH RITE FRIENDS DINNERS

A How-to Guide



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INTRODUCTION TO FRIENDS DINNERS

FIRST OF ALL, THANK YOU FOR YOUR INTEREST IN HOSTING A SCOTTISH RITE FRIENDS DINNER. The following is a step-by-step guide to help you get the program off the ground smoothly. This guide will spell out all the necessary steps for your program to be successful. Remember, the program can be big and lavish, or as small and intimate, as you would like it to be. But, no matter the size, a great deal of planning and work goes into the project and with this guide, you will be able to define the duties and assign them to your auction team.

WHAT IS A SCOTTISH RITE FRIENDS DINNER (SRFD)?

An SRFD is a local event that features an evening of fun and fellowship with an opportunity to raise money for your local Scottish Rite 501(c)(3) charity and the House of the Temple Historic Preservation Foundation, Inc. This exciting, grassroots program encourages member involvement, and provides funding for Scottish Rite charities at the Supreme Council, Orient, and Valley level. Thanks to dedicated brethren like you planning these events across the Southern Jurisdiction, SRFDs are making a difference in Valleys everywhere.

WHY SHOULD I HOLD AN SRFD?

- ✓ Raise funds for Valley 501(c)(3) charity
- ✓ Support the Rebuilding the Temple Campaign
- ✓ Engage and Involve Valley membership
- ✓ Promote positive public relations

The main purpose of the SRFD event is to promote local philanthropy and to gain publicity by reaching out to both Scottish Rite Masons and others in the local community and then providing them with an entertaining and fruitful fundraising event. SRFDs can empower your Valley to raise funds for its designated 501 (c)(3) Scottish Rite charities, such as RiteCare® and/or college scholarship programs.

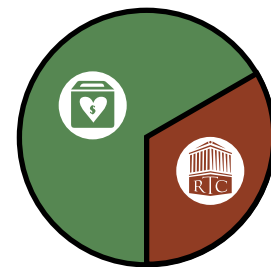


Figure 1. Two-thirds of net profit goes to Valley-designated charity. Remaining third goes to the House of the Temple Historic Preservation Foundation Inc.



Two-thirds of the net profit stays in the Valley for its designated charities, and one-third is contributed to the House of the Temple Historic Preservation Foundation, Inc. (**Figure 1**) for the care and upkeep of our historic headquarters and museum, the House of the Temple in Washington, DC.

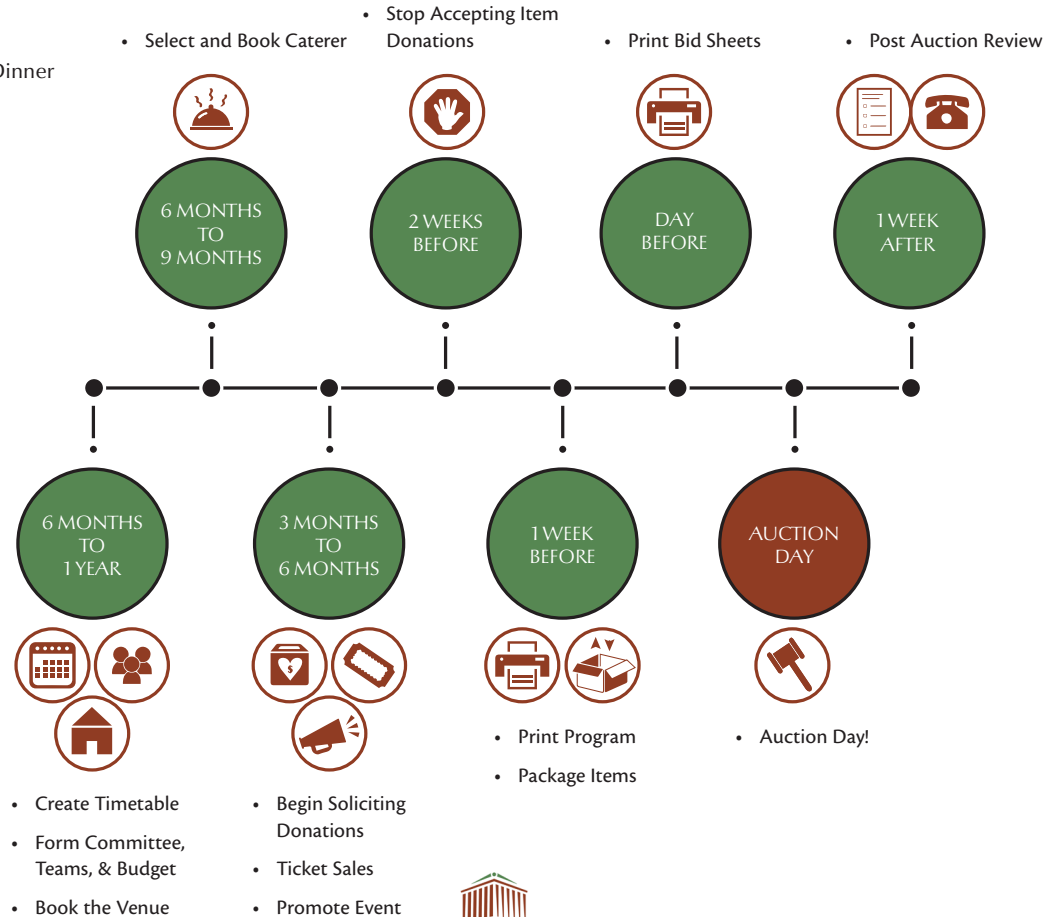
SRFD TIMELINE

As part of your fundraising efforts, you should develop a team to carry out this program. A successful program will require some critical work, and you should pick reliable people to help you form your “core team.” The event’s “core team” will act in a leadership capacity and will be responsible for contributing a significant amount of work for the event, including building the Friend’s Dinner team, assigning duties and encouraging those in the Valley to get involved.

Once you have assembled your team, the first item to address is the time needed to plan the program. Below is a sample timeline (**Figure 2**) with recommended time allotted to illustrate what you will need for the event to be set up and executed.

Each one of these timeline points has several duties that must be performed for the event to be successful. For sample auction sheets, reconciliations forms, etc., please refer to the **Appendix**; however, these events are highly customizable, so feel free to make alterations and/or additions as you see fit for your local event.

Figure 2.
Sample
Friends Dinner
Timeline



CREATING YOUR CORE EVENT COMMITTEE & SUPPORT TEAMS

AFTER CREATING YOUR TIMELINE, the next step to establish a core Event Committee from your membership to designate other teams necessary to handle all the other duties that will be required.

ESSENTIAL TEAMS

- ▶ Promotional Team
- ▶ Site Team
- ▶ Auction Team

Below, we outline some of the duties of these teams, but again, these events are highly customizable, so feel free to make alterations and/or additions as you see fit.

Also, remember that different people have different talents and motivations. Not everyone is adept at soliciting donations or interacting with others, but there is room for everyone in these events if your “core” team manages effectively.

The Promotional Team

The Promotions team responsibilities include:

- ▶ Spreading News about the Event
- ▶ Selling Tickets
- ▶ Recruiting or acting as the “Talent”



Team Goal: To secure reservations from as many people—members and general public—as possible.



► **Advertising and Marketing the Event**

Obviously, people will not make plans to attend an event of which they are unaware, so it is vitally important this team publicizes the event effectively. In addition to making announcements at Valley meetings, send correspondence like a “save-the-date” postcard/email to your members; make up flyers to be distributed at local Blue Lodges and other appendant bodies; send announcements to local papers announcing the event and stressing the importance of others in the community getting involved to support a worthy local charity.

Just like a new product, your event needs to be aggressively marketed to your target audience. You need to convince your supporters that both your organization and event are worthy of their time and money. To this end, drawing up an event marketing plan is essential. Other possible promotional methods include: using your non-profit’s fundraising network, mailed invitations, direct mail, phone banks, word of mouth, and the event host committee.

► **Ticket Sales**

Although self-explanatory, one function of these volunteers can be very important – encouraging the up-sale of single tickets to table tickets. Perhaps consider setting up donation levels to encourage higher levels of giving. For example:

Contributor Price of a ticket
 Patron..... Price of four tickets
 Benefactor..... Price of a table
 Philanthropist.....Price of two tables

Give your guests the option to donate at various levels, and remember to recognize and thank them for their generosity by printing and displaying their names in the event program.

► **Recruiting the “Talent”**

For the night of the event, it is important to engage your audience with personalities that will hold the attention of the room and create a relaxed atmosphere conducive to fundraising. It is customary to have three “front-of-the-house talents”: a host, a speaker, and a professional auctioneer.

Host: An emcee brings the room together, sets the tone for the evening, and makes certain tone is carried through the event’s entirety. Thus, they will be responsible for starting and ending the event. This person should be one part hype man, one part attention grabber.

Speaker: The speaker should be affiliated with the main beneficiary of the evening’s charitable giving. For example, if the featured philanthropy is RiteCare®, consider asking a child or the parents of a child who has benefitted from the program to talk. The speaker should be able to inform, entertain, and motivate the guests at the function. Whether your dinner is to raise awareness and funds for the RiteCare® Centers, S.R. Scholarships, or a Scottish Rite building fund, the subject should be emphasized some time before the live auction starts, which should begin as soon as dinner is over. Please try to have only one speaker and limit his or her comments to no more than 15 minutes. *The mind can absorb what the seat can endure. 😊



Auctioneer: The auctioneer is critical for the fundraising success of the event, as this person controls the bidding process. When possible, the services of a professional auctioneer should be retained. Their primary skill is to encourage high and competitive bidding throughout the live auction portion of the evening (where your most valuable and desirable items should be showcased). If you cannot find a professional auctioneer, select an individual who is aware of how a live auction works and can conduct the bidding accordingly.

The Site Team

The Site Team is responsible for handling the details related to where you are going to hold your event. This includes:

- ▶ Negotiating the contract with the venue (if necessary)
- ▶ Decorating the room
- ▶ Coordinating the catering arrangements
- ▶ Ensuring other services such as an Internet connection are available the night of the event
- ▶ Item Security (this volunteer will stay in the room during open hours to secure and safeguard the auction items.)
- ▶ Greeters/Info Desk: (these volunteers takes tickets at the door, but also help maintain security of the auction items by acting as a gate-keeper to the room and can support questions people may have regarding the purpose of the Silent Auction, how to complete the forms, when people are notified of winnings, etc.)
- ▶ Clean up: (these volunteers can also assist winners by helping carry items out to their vehicles at the end of the night)



The Auction Team

The Auction Team is responsible for all the items and descriptions that will be needed for your event, including:

- ▶ Acquiring auction Items (bundling)
- ▶ Packaging – physically combining items
- ▶ Creating item descriptions and the event program
- ▶ Set-up and display of the auction items at the venue
- ▶ Bookkeeping, with the following roles:
 - ▶ Banker: The banker is the critical focus the minute the auction closes. The banker assists with check out, filing, and cashiering. This person must be able to multitask, work under pressure with high accuracy, and be trustworthy with money. They are in charge of the most important task of the night: collecting the money.
 - ▶ Runner: During the banquet these trustworthy people take bid slips or cash from people and submit them to the banker immediately after the event and/or activity.





- ▶ Closer: The closers support the banker during closing of the Auction. They also ensure the last bids of the silent auction are highlighted appropriately.
- ▶ Office Assistant: The office assistant supports the banker with filing, bookkeeping, data entry, mailings, copying, and faxing.

KEY PLANNING DETAILS

CORE EVENT COMMITTEE

Budget

A good event plan includes a complete budget listing all of the expenses that will occur. Key items include:



Staff



Printed
Material



Rental Space



Catering



Talent



Security



Transport



Utilities

Of course, these are just the basics of a well-rounded budget. Other line items may be required to make the event a success, and a good budget always leaves room for the unexpected. When complete, the budget should consider spend accordingly to the fundraising goals of the event, but the end goal is always to raise more money than was expensed.

Event Details

There are many details that go into the program. The following is a list of necessary details that need to be discussed while the Event Committee is designing the event:

- ▶ Cost
- ▶ Occupancy



- ▶ Item Space
- ▶ Location
- ▶ Internet Connection
- ▶ Food Service
- ▶ Alcohol

▶ **Cost**

Of course, most Valleys will already have an idea of the size of event they would like to host, and as outlined before, SRFDs can be modified to suit every budget. For example, costs always can be controlled by reviewing major line-items—such as food and event location—and choosing the best option to fit your Valley.

▶ **Occupancy**

It is always smart to determine the size of the event before choosing the proper venue for the event. Since the program requires serving food, you will need table settings and seating. For a sit-down dinner to be successful, guests should have enough space where they can sit and relax for dinner and the live auction. Their comfort during the event will have a direct effect on your fundraising bottom-line.

▶ **Item Space**

Estimate the number of auction items you think you will have. You will need enough table space on which to display the items and encourage the most traffic around them. This is especially important when considering room for larger items, such as furniture or golf clubs. While it is ideal to have items available for people to see in-person, consider using detailed photographs in an attractive display, if an item simply will not fit into your allotted space.

▶ **Location**

A convenient location for your attendees is important. Please do not forget parking. If this is a concern, consider hiring a valets or asking them for a donation to help with your event. The event’s location plays a lot into its success, so take time to consider your options.

The function can be at a hotel, local community center, or at the Valley. The important thing to remember is that the site sets the tone of your event. You want to create a hospitable environment for a warm reception, with the glitz and glamour of an exciting night out.

▶ **Internet Connection**

Depending on the accounting and ticketing system you use, an internet connection may or may not be important. If you are running credit cards, you will at least need a phone line, though many times, processing credit cards through an internet connection is the fastest and most reliable method.





► **Food Service:**

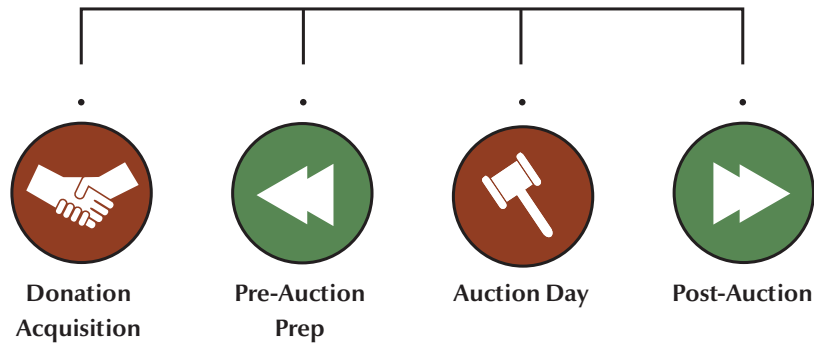
Some facilities allow outside food vendors, some do not. One popular way of getting food at your event is to ask local restaurants to come in and prepare sample size items for your attendees. You can even have attendees vote for the best restaurant to add a little excitement and to provide additional incentive for restaurants to attend. The meal can be served any number of ways, from a formal sit-down dinner to a buffet, BBQ, or Luau. Again, the local answer is the best answer depending on budget and event space.

► **Alcohol**

If your Grand Lodge and SGIG/Deputy allows alcohol to be served at such events, and all state and local government laws/procedures are followed, then you may serve it. Careful thought always should be given to this decision, though. While alcohol can be an effective wallet lubricant, it also can lead to buyer’s remorse and behavior problems if proper moderation is not practiced.

SUPPORT TEAMS

Once the committee has the general outline of the event, and an approved budget, your other teams should start planning out the details of the event program and begin to set-up. The set-up includes all of the particulars of the actual event and is best broken down by four phases:



► **Donation Acquisition**

Ideally, allow two to three months to acquire donations for your event. Obtaining larger-sized or ‘big-ticket’ items can be time-consuming, so give yourself enough time to establish rapport with local businesses. Offer them a “quid pro quo” by promoting them live during the event, in the program or, if space allows, on a brochure stand or a small display.

It is important to plan the range of products and prices at the earliest organizational meetings, taking into account your membership base. Try to have items that cater to the widest variety of budgets and space considerations. Framed prints and furniture are fine, but they take up room. Sports tickets and weekend getaways might appeal more to potential bidders with limited space. Good, smaller-sized items to be on the lookout for include antique cigar boxes and glassware.



While it is always best to approach your members first to see what items can be donated, other items may have to be budgeted and purchased for the auction. Over time you will build relationships with local retailers, antique stores, and manufacturers, and work out splits as ways of getting the community involved and building up the reputation of your function.

Remember to track your donations as they are committed to, received, and inventoried. A computer-based, spreadsheet system will help greatly, not only in this phase, but also in all phases of your event. See Appendix ?? for a sample spreadsheet.

► **Pre-auction Prep**

Roughly 10 days prior to Auction Day, try to stop accepting item donations and focus instead on invoicing donations, preparing auction items, and printing auction materials. In practice, you will find that donations will still trickle in and you will have to handle them on a case-by-case basis.

While you probably won't need a full run-through of your event, it is essential that everyone working it knows ahead of time what is expected of them in terms of their responsibilities and expected time commitment. If you are having a large or more technically complicated event, the key event staff may wish to hold a tech or dress rehearsal.

It will also be important that the pre-auction prep include packaging and creating all the printed material including the Auction Program Guide, Bid Sheets, Gift Certificates, Signage /Advertising, and any other material you need for your event. You can find templates of all these materials in the Appendix.

The following list includes descriptions of suggested print materials:

Auction Program (see **Appendix** for sample): This is the most important printed material for a successful SRFD. Not only will it inform your guests about the items being auctioned, but also it will give you an opportunity to showcase the charity to be benefited. This is also your chance to recognize and thank your donors, sponsors, and volunteers by name.

Bid Sheets (see **Appendix** for sample): Bid Sheets are what your attendees will use to bid on each item during the silent auction segment of the program. There is one bid sheet per item and should contain (at a minimum) the following information:

- ▶ The auction item title
- ▶ A description of the auction item
- ▶ A list of the donations included in the auction item
- ▶ The total value of the item
- ▶ The starting bid
- ▶ The bid increment
- ▶ A place for bidders to place their bids

Registration Forms (Appendix ??): Please note that there are several ways to register for the event, but the



most prudent way to avoid non-payment is to ask all guests at registration for a credit card number and then to assign them a two digit auction number. Additionally, hand out paddles with that number on it. This will make it both a more exciting evening for the guest and easier to keep track of all their bids.

► **Auction Day**

Depending on the size of your event and the number of auction items, give yourself up to half a day to physically set-up for the event. Make sure your leadership is present and visible for your volunteers during this time to facilitate easy problem solving and decision making during the set-up. Keep in mind that the event has many components, so it would be prudent to set up a timeline of how the day will unfold.

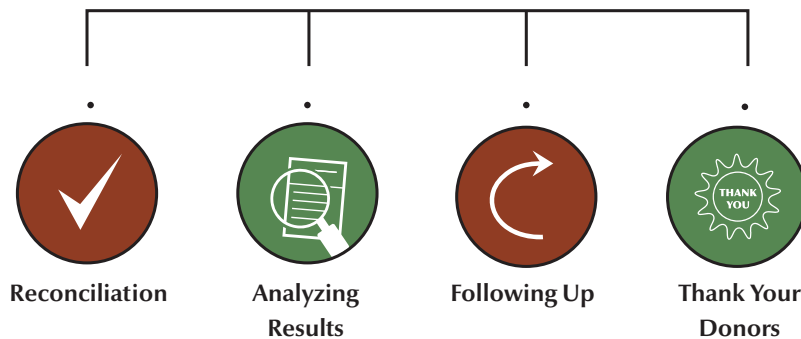
Possible event timeline:

- ▶ Setup: 10am – 3 pm
- ▶ Train, Check in / Check out Workers: 3:30 – 4 pm
- ▶ Guest Registration: 5 pm
- ▶ Silent Auction and Refreshments: 5:30 – 7 pm
- ▶ Dinner and Program Speaker: 7:15 – 8 pm
- ▶ Live Auction: 8 pm (or after speakers)
- ▶ End of Event/Check out: 9:30 pm

Once things get under way, remember your team has planned carefully, and while a few unexpected issues may arise, the program should run smoothly and guests rarely notice the little mistakes. So, enjoy the event and HAVE FUN!

POST-EVENT ESSENTIALS

WHEW! After a great deal of planning, the event is OVER! There are several tasks that will need to be completed to finalize the event, though.



RECONCILIATION

Make sure you keep a copy of the invoice from each attendee showing that they paid for the item and that they picked the item up. Using these invoices, you should be able to reconcile that invoice against the master list of auction items to help you know which items were paid for and which were not. During this phase of the event, your Banker’s teams are the most important people in the room. They will be responsible not only for taking the money safely and accurately, but also for delivering your final bit of customer service to your attendees. Having a good, organized system that can generate reports about who bought what, what was paid for and what was not, and contact information for each attendee, will make this process efficient, accurate, and friendly.

ANALYZING RESULTS

Your final analysis will help you to determine any changes necessary for improving your program’s success. The **Appendix** includes a sample “After-Action Review Form” designed for this purpose. Sit down with your auction staff and review the events successes versus those aspects that require improvement. Great SRFDs are not created out of thin air, but evolve through careful analysis, planning, and tweaking.



FOLLOW UP

There will be several follow-up tasks that will need to be completed in the days following the event. Some of these include:

- ▶ Contacting winning bidders who failed to pay for or pick up their item
- ▶ Sending out tax letters to all those that donated items, and to those that were in attendance and paid for items. *****It is important to know that the event tickets and the item's base price are not tax deductible, but any cost over the "normal" price that is spent is tax deductible.*****
- ▶ Most importantly—make sure you send out timely thank you letters to all your donors for their generosity, and consider making certificates that they can frame and display that shows their support of the community through their donation to your organization.

CONCLUSION

Remember that programs will grow over time if you are diligent about recognizing and keeping track of past participants and thanking them for their participation. Make sure time is taken to send thank-you notes to everyone who was involved in your event. This is not just exclusive to those that bought tickets, but includes volunteers, consignment shops, and corporate sponsors.

Keep your donors happy ... you never know when you may need another donation in the future.

With successful planning, a SRFD will invigorate your base supporters and build towards your future goals. As you plan for your future SRFD, please remember one last thing: **YOU DO NOT HAVE TO DO THIS ON YOUR OWN**—the Development Office staff of the Supreme Council will be available to you every step of the way. We are only a call or email away.

Thank you again and good luck!!!



APPENDIX

SAMPLE FORMS & SUPPLEMENTAL MATERIAL

1. Silent Auction Bidding Form
2. Action Reconciliation & Receipt Form
3. After-Action Review Form

SCOTTISH RITE FRIENDS

Reconciliation Report

Return the top portion of the form to the Supreme Council.

Valley Name: _____ Date of Event: _____

Item Description: _____

Amount: \$ _____

Subtract Item Value: \$ _____
(Cost + S&H)

Subtract Fraternal Use: \$ _____
(if applicable)

Amount Tax Deductible: \$ _____

Payment Type: Cash Check Credit Card



SCOTTISH RITE FRIENDS

Auction Receipt

Valley Name: _____ Date of Event: _____

Date: _____ / _____ / _____

Amount: \$ _____

Name: _____

Address: _____

City: _____ State: _____ Zip: _____

Monies raised during this Scottish Rite Friends Dinner and Auction will be divided between your local Scottish Rite charity and The House of the Temple Historic Preservation Foundation, Inc. which is a non-profit Virginia corporation recognized as a tax-exempt public charity under Section 501(c)(3) of the Internal Revenue Code of 1986, as amended. Its tax identification number is 52-1664576. Gifts to the House of the Temple Historic Preservation Foundation, Inc., are tax deductible to the extent allowable by law.

SCOTTISH RITE FRIENDS DINNER & AUCTION

After-Action Review

Dear Committee Chairman,

We would like to thank you for participating in the Scottish Rite Friends program! The funds you raised will greatly benefit your local Scottish Rite charity, as well as the Rebuilding the Temple Campaign to restore and preserve the House of the Temple.

Please take some time to fill out the following After-Action Review of your Friend's Dinner and Auction. Your input and feedback is essential in helping us improve this program not only for the attendees, but for the Valley members who work so hard organizing and conducting the event.

This document is a "fillable PDF" so you may fill it out on your computer and email it to us or you may print this form and mail it to us once you have filled it out.

Email: developmentoffice@scottishrite.org

Subject: SRFD After-Action Review

Regular Mail: Supreme Council, 33°

1733 16th Street, NW

Washington, DC 20009

We appreciate you taking the time to complete this form and contributing to the improvement of this special program.

If you have any questions, please contact the Development Office at 202-777-3111.

Continue ►

SCOTTISH RITE FRIENDS DINNER & AUCTION

After-Action Review

VALLEY NAME: _____

EVENT CHAIRMAN: _____ EVENT DATE: _____

NUMBER OF ATTENDEES: _____ TOTAL AMOUNT RAISED: _____

VALLEY 501(C)3 CHARITY TO BENEFIT FROM FUNDS RAISED: _____



Summary of your Valley's Friends Dinner & Auction:

Committee Members & Key Staff	Duties

What went well and why? Please list the successful steps taken toward achieving your goals.
 (If you need more space add it to the Additional Comments section at the end.)

Successes	How to Ensure Success in the Future

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What can your Valley to improve the event?

(If you need more space continue on the Additional Comments section at the end.)

What can be improved	Recommendations

What advice would you give to a Valley interested in conducting an event for the first time?

What feedback did you receive from committee members and staff?

What feedback did you receive from attendees?

How can the Supreme Council improve this program? Please tell us how we can help you conduct a successful event. Tell us what should be added to or changed in the *Scottish Rite Friends Dinner: A How To Guide*.

Additional Comments

Committee Chairman Signature

Date