

A stylized silhouette of a wine bottle is positioned on the left side of the cover. The bottle is filled with a dark red liquid, matching the background. The neck of the bottle is wrapped in a yellow and gold foil. A small, white, curved shape is visible on the left side of the bottle's body, and a yellow oval shape is visible on the right side. The bottle is set against a solid red background.

Wine Tasting Planning Kit

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UNLOCKING THE SECRETS OF BRAIN DISEASE™

INTRODUCTION

This kit is designed to take you through the process of planning and executing a wine tasting to support CurePSP. In this kit, there is a template for a timeline, a planning guide, and a committee task sheet to assist your efforts. The following guide is not all-inclusive; however it is designed to assist you in implementing a wine tasting.

The beauty of a wine tasting is that you don't have to have a large group of wine experts to hold a successful tasting. A tasting can be a quiet event or an extravagant occasion depending on the ambitions of the committee. If you have never taken on a large event before, planning a wine tasting can build the confidence of your participants to tackle a larger event in the future.

When possible it is recommended that you hold a wine tasting at a local vineyard or a location that already serves alcohol. Doing a tasting on premise frees you from being involved in permitting, identity verification, and other legal considerations. Additionally, the event coordinators employed by the locations will be able to make expert recommendations on wines, pairings, and quantity to help you stay within budget.

Also included in this kit are templates to help you develop a budget, a solicitation request letter, and press release. If you have any questions or comments about this planning kit, please contact Jaclyn Zendrian, Director of Events, at zendrian@curepsp.org.

WINE TASTING TIMELINE

Four to Six Months Before

1. Develop a volunteer committee. Duties of the committee include:
 - Deciding if a wine tasting is a good fundraiser
 - Determine your fundraising goal
2. Recruit the following volunteer leadership:
 - Event Chair
 - Print and Promotions Chair
 - Sponsor Chair
3. Choose and secure a location for your wine tasting.
4. Reserve a date and time.
5. Have committee chairs enlist additional volunteers for their committees and assign tasks.
6. Develop a budget.
7. Set ticket prices based on your fundraising goal keeping in mind the affluence of the community.
8. Choose a theme for your tasting.
9. Decide on any additional fundraisers you would like to accompany the tasting (silent auction, raffle, etc.)
10. Develop a list of potential vendors as donors and begin soliciting them.
11. Compile a list of potential guests

Three Months Before

1. Secure necessary equipment, including tables, chairs, linens, etc. that are not provided by the venue.
2. Evaluate current secured donors and reassign donor recruitment duties to volunteers.
3. Develop a publicity strategy.
4. Create an event floor plan.
5. Select and book entertainment (optional).
6. Decide on an event registration method.
7. Develop and mail save the date cards (optional).
8. Order complimentary wine glasses (optional).

Six to Eight Weeks Before

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

One Month Before

1. Finalize décor and floor plans.
2. Follow up on any guests who have not replied.
3. Confirm the onsite volunteers.

Two Weeks Before

1. Confirm vendor, staff, and volunteer arrival times.
2. Prepare remaining vendor payments.

One Week Before

1. Confirm final number of participants and inform the venue.
2. Review volunteers' event day tasks, arrival times, etc.
3. Double check status of all sponsorships and purchases.

Day Of The Event

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

Immediately After

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

Within Four Weeks After

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

GETTING STARTED

To begin the process you will need to develop a volunteer committee. This committee should include supporters who either have experience in event planning or are well connected in the community. The committee will be responsible for selecting leaders and making the decisions about your wine tasting.

One of the first tasks of the committee should be to evaluate your community and donor base to determine if a wine tasting would be a worthwhile fundraiser. We encourage you to have additional fundraising opportunities at your tasting because otherwise the money you raise will come solely from tickets. This will ensure your success as the most profitable it can be in a community where a large group of people would be interested in attending.

RECRUITING LEADERSHIP AND VOLUNTEERS

After your committee moves forward with the wine tasting, the members should begin deciding on the people to oversee certain aspects of the event. Below are some job descriptions of potential leaders for planning committees.

Event Chair

The event chair is the person responsible for overseeing the entire event. Ideally, the event chair should be someone who has connections with wine and liquor distributors and suppliers in your community and who has experience in planning events. A few duties of the event chair include selecting the food and wine that will be served, booking entertainment, choosing a theme, overseeing decorations, and handling registration.

Print and Promotions Chair

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

Sponsor Chair

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

Once these leaders have been chosen, they should begin recruiting additional volunteers to fill their committees. Potential volunteers include Masons in your region, co-workers, supporters, and suppliers. Commit the same energy to recruiting volunteers as you do to getting sponsors. Look for volunteers with specific talents, and assign them tasks that they can use their talents to accomplish.

Don't forget to involve support groups in your fundraiser. Members have a higher likelihood of being employed by people who might be interested in sponsoring or donating to your event. They also will know the organization intimately and will be able to present a compelling case when soliciting sponsors.

The event chair should hold regular reoccurring meetings with committee leaders. Create a schedule for committee meetings, and be sure to prepare agendas in advance to go over at each meeting to keep them productive.

CHOOSING A LOCATION

Start looking at venues to hold your event at as early as possible. If your wine tasting is scheduled at a popular time, some sites could be booked several months in advance. Do not reserve a venue without touring it first, even if it comes highly recommended.

When selecting a location for your wine tasting, the most important thing to consider is space. Make sure you find a venue with plenty of room for guests to move around, and allow enough room around the wine tables to avoid congestion. There may be attendees with wheelchairs and walkers so they will need additional room to maneuver. If you have decided to hold a secondary fundraiser along with your wine tasting, be sure your venue is large enough to accompany everything and everyone.

Thoroughly examine everything that is offered, and don't just go with the most inexpensive option. Some venues may have their own tables, chairs and linens, while others may require you to provide your own. Be sure to review the contract line by line and review the payment schedule. If you need to put down a deposit first, be sure you have the money available for it up front. Finally, don't be afraid to negotiate!

CHOOSING A DATE AND TIME

Determine what day of the week would work best for your event. Would enough guests be able to attend if your event was held on a weeknight, or would a weekend work best? Be sure to search for city-wide events before choosing a date to prevent scheduling your event on the same day as a major community event. Avoid religious holidays and other potential conflicts.

Wine tastings are usually held at night or late afternoon. Because you will not be serving a full meal at your tasting, choose a time that will allow your guests to have dinner before or after the event. Some states require food to be available for attendees at samplings so be sure to review any local regulations. Have a list of cab companies available in case someone enjoys the event too much.

CREATING A BUDGET

The template has been created to automatically calculate total costs and includes places to add additional expenses you may incur.

Rule out venues, food, and wine that fall outside of your budget. Expenses can accumulate quickly in planning events, and if something is already outside of the budget, don't take the time to consider it.

After you have created a budget for your event, determine how much you will charge for tickets. Factor in the cost of the venue, wine and food, set-up, servers, decorations, entertainment, and printing and publicity expenses. Keep in mind that you should set your ticket cost based on the economic level of your community and the quality of wine and food you plan to serve. Once you determine what the cost of a ticket is be sure to add in a markup for a donation. It's important to distinguish how much is going to the event and to CurePSP as a donation

SETTING FUNDRAISING GOALS

Ticket proceeds will be the main source of revenue for your wine tasting. To increase your profits, consider combining your tasting with an additional fundraising event such as a silent auction or a raffle. The addition will maximize your guests' enjoyment, and often people are more willing to give to a few different things than to write one large check.

CHOOSING A FORMAT

Theme and Decorations

While a themed event is entirely optional, keep in mind that there are several creative ways to make your event more interesting without breaking your budget. Having a theme will give your event a longer lifespan, allowing you to make each year's event a new experience for guests with a new theme. Evaluate your potential guests when choosing a theme for your wine tasting. If your guests have high expectations and ticket prices are expensive, a creative theme will bring excitement and validity to your event.

Consider the following themes:

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

The options for themes are countless. Be creative, however make sure to confirm with your venue on how much choice you will have in incorporating your theme into the decorations and room. It's important to inquire if your venue provides items such as tables, chairs, silverware and linens, or if you will be responsible for them. If they need to be brought in from another vendor that will add to the cost of the event.

Entertainment

Consider booking a harpist or small group to provide chamber music at your wine tasting. The background music would add to the ambience of your event. Often local music schools have students that are available and looking for work.

It's recommended that if you choose a venue that doesn't provide a dedicated sampler you may want to recruit a wine expert to describe the different kinds of wines being served and discuss what to look for in wine tasting. Keep your budget in mind and rule out entertainment if your funds don't allow for it.

SELECTING WINE

When selecting the wines you will serve at your tasting, take the following into consideration:

Theme

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

Guests

Think about who your audience is when you choosing the wine. If you plan to have a several big wine enthusiasts attending be more selective with your wines. The quantity of guests will also determine the wines you select. A larger event will require a greater variety of wines, while a smaller tasting can manage with fewer kinds.

Ticket Price

The quality of wine you offer will dictate the price of tickets. A high-end event will require more unique, costly wine. Be sure that price of your tickets match the quality of wine. Because if they do not match this could dissuade your guests from attending your event following year.

PAIRING FOOD WITH WINE

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

SOLICITING FOOD AND WINE DONATIONS

The most profitable scenario for your tasting is to have the wine and food you serve donated. When looking for local food and wine suppliers to make donations, a face-to-face request is your best tool of persuasion for support. Start with putting together a list of potential donors and assigning the committee members to approach a certain number of businesses. Families and care partners will be especially valuable in soliciting donors since they will be able to tell compelling, personal stories about the way neurodegenerative disease has touched their lives.

A letter template is available to help you put together donation request letters, but the letter should be used as a last resort or as a formality if someone has already made a verbal commitment to make a donation to your event. Refrain from blindly send out letters until after you have approached your community contacts.

When soliciting wineries for donations, ask if a representative from the business would be available to serve the wine. From a vendor's perspective, being a part of your event would provide them with an opportunity to sell their wine. In turn you will benefit from having an expert serving and discussing the wine you are featuring. If a winery isn't open to donating, ask for the discounted, wholesale, or non-profit rate. Again, don't be afraid to negotiate.

DEVELOPING A PUBLICITY STRATEGY

Take advantage of every opportunity available in your community to publicize your event. Notes in company newsletters, local newspapers, online forums, and announcements at organizations your committee members are involved with can help to spread the word and recruit attendees. A press release template is available to personalize and submit to your local newspaper.

RECRUITING ATTENDEES

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

Potential attendees include:

- Families and care partners of patients
- members of local clubs (Masons, Elks, Moose, etc.)
- religious organizations and clubs
- support groups
- friends, family, or co-workers of committee members
- local small business owners.

Begin by sending out save the date cards roughly three months before the event. Then follow up by sending invitations approximately six to eight weeks before the event. Including a registration deadline will help to prevent last-minute additions.

EVENT LOGISTICS

Registration

Online event registration is a great tool for organization. Many people have had success with Eventbrite and Facebook events. Coordinate a system of obtaining and processing registration funds, and assign two people to oversee the money coming in to assure accuracy of the accounting. Check with your committee members to see if any of them are able to process credit card transactions. PayPal and Eventbrite also have mobile devices available.

Photographer

A wine tasting does not necessarily warrant a professional photographer unless you can arrange for a volunteer to take pictures at your event. The photos could be used in newsletters and posted on Facebook and the CurePSP website after the event, and they could also be included when promoting next year's event.

Tables and Seating

Plan to have several 8-10 person tables available for the wine to be served from. The number of tables you'll need will depend on the number of wines you will be offering. If you plan to have a silent auction or a raffle with your tasting, factor in 6 ft. tables for those items.

You do not necessarily need to have enough chairs for everyone since a wine tasting is more of a social mixer event. A good rule is to allow for seating for two-thirds of your guests. An alternate option is to have smaller, four-person tables with chairs mixed with high top tables (aka tall boys) for guests to set their glasses on and socialize around.

Serving Wine

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

EVENT DAY TASKS

Make sure you arrive early enough on the day of the event to have everything set up and decorated before your vendors arrive. Create a system to confirm that all volunteers are present. Set up the registration table in a highly visible area usually near the entrance, and consider the flow of check-in to allow plenty of room and avoid congestion. Place signage in visible areas and be sure to check that the area is set up and staffed properly.

Arrange for several pitchers of water to be available for attendees to rinse out their glasses and cleanse their palates between wines. Make sure either the venue staff or a volunteer is responsible for refilling the water. You also will need to set up dumping buckets for guests to discard their wine. As with any alcohol-related event, keep an eye on your guests throughout your tasting to ensure they are enjoying themselves and there are no on site concerns.

POST-EVENT WRAP UP

Thank You Notes

Within four weeks following your event, send personal thank you notes to your volunteers and donors. Handwritten notes leave the best impression however email is also acceptable. Showing appreciation to your contributors will increase the likelihood that they will be a part of your event next year, and overlooking them is a faux pas that will make them reconsider helping with future events.

Planning for Next Year

Always debrief with your committee members after your wine tasting in order to evaluate its successes and failures. Talk about what strategies worked best and how you could improve the event in the future. Consider sending out a survey to gain feedback from your event. Often times they will reveal things you hadn't thought of or noticed the day of the event. A great survey tool is Survey Monkey.

WINE TASTING COMMITTEE TASK SHEET

Event Committee

- Select venue.
- Choose a theme.
- Establish your budget.
- Set ticket prices.
- Decide on event floor plan.
- Plan and oversee decorations.
- Select and book entertainment if you choose to have it.
- Develop and implement a way to process guest registration.
- Confirm committee members' event day tasks, time of arrival, etc.
- Oversee venue, equipment rental, entertainment and other vendors' payment.
- Return all rented and borrowed equipment and decorations.
- Confirm that post-event acknowledgements have been sent.
- Review event for successes and failures and document them for next year's event.
- Send out the post event survey.

Print/Promotions Committee

- Develop a publicity strategy.
- Obtain guest addresses and emails.
- Design, personalize, print and mail save the date cards.
- Design, personalize, print and mail invitations or send out emails with the link.
- Obtain potential donor addresses from sponsor committee.
- Personalize, print and mail donor request letters.
- Create and submit press releases to local newspapers.
- Submit any other announcements to community for event publicity.
- Print and mail post-event sponsor and donor acknowledgements.

Sponsor Committee

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

Budget Template & Sheet

The Budget Template is designed for you to edit to your situation. As you enter anticipated and actual expenses, the sheet will automatically calculate your total expenses.

Donor Request Letter Template

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

Press Release Template

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



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