



THE SHIVAS IRONS SOCIETY

EVENT PLANNING GUIDE

To Our Volunteers:

First, let me offer my sincere thanks for volunteering to help organize a Shivas Irons Society golf outing in your area. We believe these events are the life-blood of our community. They are our primary way to remind ourselves, and our friends, that golf can be a mindful pursuit filled with opportunities to discover our true natures.

Second, there is no right way to put on a Shivas Irons event. Use your imagination – create the shot! – in the spirit of the Society and its mission. Have four golfers or forty or more. Just go for dinner and “sing the praises” of this great game. The guidelines we present here are simply that – suggestions based on our experience of hundreds of successful events and trips organized by the Society and its members since 1992. Financial issues are obviously important and need to be handled responsibly, but within that minimal constraint there are as many creative possibilities for golf and adventure as you can imagine.

Finally, and most important, you are not alone. You and your team will have the support of the Shivas Irons Society office in planning and holding your event. And that includes help with member communications, online registration and financial arrangements with the host course. There is a lot of useful information in this Event Planning Guide, and on www.shivas.org, and we encourage you to make use of our learning to ensure that you hold the best possible Shivas Irons outing in your area.

Again, many thanks for your willingness to be part of our great volunteer team.

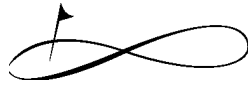
In True Gravity,

President, The Shivas Irons Society



EVENT CHECKLIST

- 1. Gather a team of volunteers.
- 2. Planning the location, date and price range for the event.
- 3. Prepare a timeline for implementation.
- 4. Contact the Society office to discuss your plan.
- 5. Plan the activities and develop your itinerary.
- 6. Work with the pro shop.
- 7. Gather all cost information.
- 8. Prepare a budget and establish the price.
- 9. Be clear on handling the finances and accounting.
- 10. Work with the Society office to produce the invitation and registration form.
- 11. Get the email list of local/regional members from the Society office.
- 12. Market, market, market.
- 13. Verify the final count with the golf course and restaurant.
- 14. Coordinate final details.
- 15. Let go and have fun!
- 16. Follow through on post-event items.



“An image in our mind can become an irresistible path.”

Shivas Irons, *Golf in the Kingdom*

GATHER A TEAM OF VOLUNTEERS.

We strongly recommend that you not attempt to put on an event of more than eight participants on your own – have at least one co-organizer. Contact other members in your area to work with you. If needed, contact the Society office; we may have additional names of members near you who have expressed an interest in volunteering their time or skills.

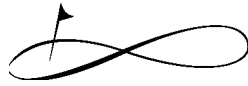
In staging an event, dividing up the tasks makes it easier if you have a number of volunteers. For example:

- facility and site arrangements
- event activities
- marketing / email list management / mailings
- accounting / registrations
- fund raising / auction, if any

PLANNING THE LOCATION, DATE, PRICE RANGE OF THE EVENT.

Except for small, local gatherings, our experience suggests that planning a Shivas Irons event should get underway about six months in advance. A year may not be too long if you're thinking about something complex, such as a major fundraiser or multi-day event. Whatever you have in mind, here are some general questions you should discuss in the initial planning meeting:

- When is the best time of year to hold your event?
- Is this a one-time event or are you intending to create an annual tradition?
- Will you hold the event during the week or on the weekend?
- Will it be held at a private club or public course?
- What price range do you want to establish for the event?
- Will it be affordable to all or most players?
- Does the facility have a private meeting room available?



- Where will you have the breakfast, lunch and/or dinner?
- Are there hotel accommodations nearby for people who want to stay overnight?
- Finally, does it conflict with major events or celebrations such as Mother's Day, the Super Bowl, the U.S. Open or national Society events?

Once you have determined the details, we recommend that you book the event on the desired date(s) with the course and food and beverage facilities as soon as you can. In determining the date, it's best – though not absolutely necessary – to allow about 60 days for marketing of the event, especially if it's a new outing in your area.

PREPARE A TIMELINE TO IMPLEMENT THE PLANNING STEPS.

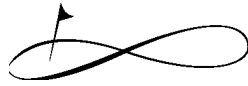
Allow reasonable lead times and set deadlines for accomplishing tasks. Be clear about “who” is doing “what.” Stay organized. This is especially important in two areas – marketing of your event and on the detailed planning of the actual outing.

CONTACT THE SOCIETY OFFICE TO DISCUSS YOUR PLAN.

This is the call we really look forward to. Your ideas for an event really get us excited, so please call. We have a lot of support to offer in terms of ideas, email lists, website marketing, online registration, financial arrangements and so on, and we want to – and need to – get involved. That said, we expect you as volunteers to design the event, do the marketing, make arrangements for golf and meals, and ensure the day goes according to your vision for it.

PLAN THE EVENT ACTIVITIES AND DEVELOP AN ITINERARY.

Usually the best advice is to keep the program simple. Consider your planning lead time, the price range you want to maintain and the amount of help you have. Weigh any planned activities with their respective costs. At a minimum, your event should include a round of golf, a meal and an opportunity to “Sing the Praises” of the game. Allow for possible changes in plans and maintain an element of surprise with as many planned items as you can. See the Event Planning section of shivas.org for samples of actual past event itineraries and then create your own.



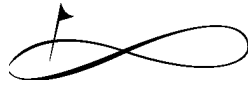
Give some thought to the golfing format. How will you play? For learning? For enjoyment? For creativity? As a scramble? As a Kid-AM? Or, as Shivas taught MacIver, “Six for the centered swing, six tee feel true gravity, and six tee scoor?” The best part of the event will be the camaraderie and interaction of the people, so provide enough time for those connections. Save some good ideas for the next event if the schedule seems too crowded.

WORK WITH THE PRO SHOP.

One of the first things you’ll need to secure is tee times, which will require you to make an estimate of the size of event you’re planning. If you’re going to strictly limit the event to 16 players, for example, or the course can only accommodate eight foursomes on the day you’ve chosen, your task is easy. But if you want the number of participants to be open-ended, with a minimum number of players, then you’ll need to negotiate some ‘wiggle’ room with the pro shop in case your numbers expand. Most pro shops are willing to block off an additional two (or more) tee times to accommodate overflow, and you should regularly update them if your roster grows beyond what you originally anticipated. Typically, you’ll be asked for a final count of players 4-10 days before an event takes place. At that time, they will require player names for carts, if you’re taking them, as well as handicaps or estimates if the shop is handling scoring for your event.

If you’re having a reception and/or dinner following golf, the challenge is to get players off the course within a reasonable time so that everyone can socialize. That’s a challenge for larger groups that all start off the first tee. If you do have a large group, explore the possibility with the pro shop of a shotgun start – even on one nine – or starting times off the first and tenth tees.

The pro shop is there to help your event run smoothly – ask what they can do for you. They can usually handle scoring, if that’s the direction you’re going, and any other standard outing events like closest to the pin and longest drive contests. (We’re not big fans of standard-issue contests, but it’s your event. Be creative – how about closest to the pin while hitting from one leg?) If you have a group that’s large enough, you may also be able to negotiate a discount on merchandise in the pro shop.



GATHER ALL THE COST INFORMATION.

Experience has proven that most organizers underestimate the total costs of the event and so under-price the fee for participants. We understand that it can be difficult to have an accurate tally of final costs months in advance, especially given last-minute contingencies, but it's important your committee try to anticipate as many expenses as possible. Here's a typical list that may apply to your event:

- anticipated marketing and promotion expenses, e.g., printing, mailing
- welcome gift and/or refreshments on arrival, if any
- greens fees
- range fees if not included
- cart, caddie or forecaddie fees
- golf prizes, if any
- access to locker rooms/shower facilities if not included
- food and beverage
- room charge and set-up charge
- taxes and gratuities
- workshop facilitator or guest speaker fees, if any
- charges for audio/visual equipment, if needed
- donation to the Shivas Irons Society (see information below)

Be attentive to any minimum number guarantees and deadlines for notification that may be required by the golf course or restaurant. Do you have any participant, such as your guest speaker or facilitator, who will not be paying a registration fee? Be sure to include those costs if they're playing golf and/or having dinner.

In planning an event like this, several small items can greatly enhance the experience but will also cost money. For example, will you supply a small gift to the participants? Will you supply entertainment such as a band, bagpiper, or Scottish dancers, or will you have Celtic music playing on a boom box? Will you play night golf or hit featheries or gutta percha balls? Will there be prizes? Will you have tee signs made? Be diligent in identifying ALL costs associated with staging the event.



With regard to alcoholic beverages, we recommend a cash bar rather than a meal price that includes drinks. Some people just don't care to drink and shouldn't be expected to subsidize those who do. That said, we've had wine makers donate wine for a Society dinner because they want exposure to the kind of audience we can provide.

PREPARE A BUDGET AND ESTABLISH THE PRICE OF THE EVENT.

Once you know all the costs for the facility and all the planned activities, add the administrative expenses such as printing, envelopes and postage. These should be minimal because most event marketing is now done by email, website and telephone.

Also include a target amount to be raised for the Shivas Irons Society. Since the Society is funded primarily through membership and contributions from events like yours, this is an important part of our financial viability as an organization. Your event should generate enough revenue to cover the event's costs and administrative expenses and have a target amount left over that can be contributed to the Society. The Shivas Irons Society is a registered 501(c)3 charitable organization, and donations are tax-deductible to the extent allowed by law; we will issue receipts for contributions over \$250 per person.

What's a reasonable amount for donations that support the "mothership"? Here's a rough guideline, based on the overall cost per participant of your event:

- Less than \$100: \$25 per person
- \$100 to \$150: \$50 per person
- \$150 to \$200: \$75 per person

And so on. You will need to exercise some discretion. Please feel free to call the office if you would like some guidance.

Next, estimate the attendance to establish a price per person that will cover all the costs and projected expenses. Use your best judgment on estimating attendance, but err on the conservative side. Contact the Society office to discuss the number of people on the mailing list in your region. Historically, a 10% to 15% response might be expected; however, the response may be higher since you are inviting current, past and prospective members to an event within an easily accessible geographic region, at an affordable price, at a favorable time



of year, with attractive activities! Consider incorporating a member / non-member incentive pricing structure to encourage non-members to join the society before the event.

Additionally, you may want to explore the possibility of generating revenue beyond the registration fees. Consider a silent auction, for example. Past regional events have been successful in auctioning tee signs or items donated by members and local merchants. Because of the uncertainty of the amount of money which an auction can raise, be sure that your budget does not rely on it to meet the event's financial obligations. If you decide on an auction or other fundraising project, it will need at least one person's energy. That's why it's important to get as many people involved in the planning as possible.

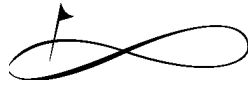
BE CLEAR ON HANDLING THE ACCOUNTING AND FINANCES.

The event must be self-sustaining, financially, and, ideally, provide a contribution for the Society. You are entrusted with the responsibility to manage the pricing and budget for the event and, in specific ways, the finances.

Registration Payments. Please ensure you set a deadline for the receipt of payments. Our goal is to have as many participants as possible register for an event at www.shivas.org, where they can do so securely by credit card. We have found that some people prefer to fax or call-in credit card information, which is certainly acceptable. Others may wish to pay directly by cash or check, and it is your responsibility to ensure that all such direct payments are submitted to the national office in Carmel, CA. We recommend that you deposit any cash payments to your own account and write a check to The Shivas Irons Society for the same amount. When submitting registration payments to the office – which we ask that you do promptly and regularly – please ensure that you include a list of names and contact information for the participants who have paid in this manner.

The terms for cancellation and refunds should be clearly set out in the event invitation. All refunds must be handled through the Society office.

Contracts and Event Expenses. As the local organizer, you may be required to sign a contract with the golf course and/or catering operation as an agent of the Shivas Irons Society for the event you're holding. However, we do not expect you to make other than temporary financial commitments to secure the event. Our preference is to have the Society



office handle all contracts and payments for events. When partial or full payment is required for tee times, food and beverage costs, and so on, please contact the office with the name/s of your contacts at the course/facility so we can secure the contract with a Society credit card. Typically, such payments are needed 60-120 days prior to the event, with final payments 7-14 days in advance of the event. Expect some post-event reconciliation as well.

Incidental Expenses. Please plan on covering any small, up-front expenses such as photocopying, mailing supplies and postage. These expenditures will be reimbursed to you promptly by the Society's office upon submission of receipts. All other expenses will be paid for directly by the national office from the event proceeds.

During the development of the event, be aware of opportunities to barter, trade, or have goods or services donated. This will help keep the cost of the event as low as possible. Since we are a non-profit 501(c)(3) organization, any goods or services donated by a vendor may be tax-deductible to them.

WORK WITH THE OFFICE TO CREATE THE INVITATION AND REGISTRATION FORM.

In the Event Planning section of www.shivas.org you'll find a few samples of email invitations that you can use as templates for the kind of information the Society office needs to help you promote your event. Here's an overview of the information we need to ensure that email we create and the 'pitch' on the Society website is as compelling as possible:

- Course name and location
- Course architect
- Attractive photo/s, ideally high-resolution JPEG format from the course management or 'ripped' from the course website, if available
- Reviews or other comments on the course
- Overall theme of the outing, if any
- Description of the event you're planning (see examples on shivas.org)
- Names and credentials of any special presenters
- Date and cost of the event
- Itinerary for the day, including meals



In the Event Planning section of shivas.org you will also find several ‘templates’ of invitations that can be emailed to potential participants for your event; simply customize the information to suit your needs. Though we believe most people can be reached by email these days, you can also print this electronic registration form for standard mailing to those who you think prefer to receive an invitation this way. Whatever you decide on by way of mailing, ensure you keep the postage to a first-class stamp.

Encourage people to bring guests. A regional event is a great opportunity for prospective members to connect with the Society. Also include a list of nearby accommodations with phone numbers, and let attendees make their own lodging arrangements.

GET THE EMAIL LIST OF LOCAL/REGIONAL MEMBERS FROM THE SOCIETY OFFICE.

We will provide you with email addresses for current and past Society members within your region. We can also supply mailing labels if needed.

MARKET, MARKET, MARKET.

We have found that a “build it and they will come” approach is not too effective in getting members and their friends out to events. Like it or not, most people need to be told about how interesting or how much fun a Society outing will be, then told again. And then told once (or twice) more.

We recommend that your team try to create a “viral marketing” effect. In other words, send out the email invitation to Society members in your area, and ask them to forward it to all of their golfing friends who may be interested. You might even consider a ‘pass it on’ message in the invitation email itself so that the message spreads more quickly and broadly. Then send follow-up reminders about the event, or teaser emails indicating how exciting/interesting/fun the outing will be.

If you find registrations lagging – be sure to check in regularly with the Society office to see how online sign-ups are going – you and your team may want to consider a telephone campaign to get people committed to the event. You may also find this the most effective option for follow-up if you’re planning a relatively small event.



For mailed invitations, the quantity of invitations should be manageable for one or two persons to handle in a short time. Be sure to keep your receipts and submit them for reimbursement.

VERIFY THE FINAL COUNT WITH THE GOLF COURSE AND RESTAURANT

Verify the final count of participants with the golf course and restaurant. The course and restaurant will let you know when the final count is needed. Typically, it's 7-14 days in advance.

COORDINATE THE FINAL DETAILS.

Assemble a personalized 9x12-inch welcome envelope for each person attending. Here are a few things you might consider including, depending on the nature of the event you're holding:

- a cover letter (see shivas.org) of welcome that outlines the schedule for the day;
- details of the 'play' for the day; if riding, this can be on the carts, e.g.,
 - tees to be played
 - number of drives to be hit by each player in a scramble
 - scoring for modified Stableford event
 - silent holes, one-club holes, etc.
- two name tags, the first that will inevitably be lost during golf and the second for the reception/dinner period;
- a list of people attending the event;
- any welcome gifts that might fit in the envelope;
- two SIS membership pamphlets and any other information you want to include.

The attendee list will allow people to contact each other after the event to help build the community momentum coming out of the event, if they wish. The two membership pamphlets are for each attendee to give to friends and are available on request from the Society office.



Create the pairings for the foursomes, being mindful that some people may request to play together. Reconfirm any workshop leaders, speakers, or entertainment. If it's part of your plan, have tee signs prepared, merchandise donations arranged and auction details planned. Acquire the materials for night golf, featheries or gutties, etc., if they are part of the festivities. Prepare any welcoming remarks to start the day and to open the "Singing the Praises" after dinner – make sure you bring a copy of *Golf in the Kingdom* at the very least to do a reading or two that will set the tone for conversation. You may want to ask one or two people who are attending if they are willing to take some pictures or video.

Verify and arrange final details – including any outstanding payment issues – with the pro shop, food and beverage department and the Society office.

LET GO AND HAVE FUN!

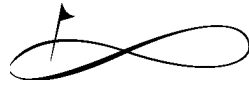
Once the planning and coordination are done and the day arrives, relax and have fun at the event. You'll find it a little chaotic initially, especially if most people arrive and sign-in at about the same time, but that will pass quickly and easily if you've done your preparation. It's a good idea to have at least two people staffing the sign-in table so this part of the day goes smoothly.

Don't worry about things you can't control – enjoy the spontaneity. Take pictures or videos, both posed and candid. Jot down story lines of the event; note occurrences, interactions, impressions and conversations that can be recalled later. Most importantly, enjoy yourself.

FOLLOW THROUGH ON POST-EVENT ITEMS.

We recommend that, a few days after the event, you write a brief follow-up email to everyone who was in attendance. Thank them and ask for assistance with next year's event. Extend an invitation to join to the Shivas Irons Society to participants who did not become members. Encourage interaction among members within the region during the coming year. See the Event Planning section of shivas.org for an example.

Prepare a brief and basic accounting summary of the event and submit, with any outstanding invoices, receipts, and any remaining funds to the Society's office. Send pictures, comments, and stories from the event.



Pat yourself on the back. Put your feet up and relax a bit. Reflect on the good time the group had as a result of your efforts. Then, connect periodically with the people you met at the event and have fun at your local level. Talk about the event and start your plans for next year.

Many thanks for your support of the Shivas Irons Society. We sincerely appreciate your efforts on behalf of mindful golfers in your area, and on behalf of the Society and its mission of self-discovery through golf.