

# Fundraiser Kick-Off Meeting



## Invite:

- ALC and KW Cares Committee Members
- Associates in the Market Center
- Vendors
- Family/Friends of Associates

## Share the Vision:

- Have a flier with photo and story about KW Cares
- Explain the importance of keeping the KW Cares coffers full—to enable grants to be made to those with hardships due to sudden emergencies

## Explain how the Bowl-A-Thon will be Conducted:

- Teams:
  1. What is the amount of the entrance fee?
  2. What is included? How many players per team?
  3. What is each player expected to raise?
- Sponsorship opportunities
- Contests

## Distribute Registration Materials:

- Registration Forms
- Pledge Sheets
- Contest descriptions and rules

## Set the Fundraising Goal:

- Number of lanes that will be used at the bowling alley 10
- Number of members per team 6
- Number of teams 10
- Fee for teams \$125
- What does the registration fee include? (i.e. 2 games of bowling, shoes, t-shirt)
- Each bowler pledges to raise \$100 for KW Cares
- Sponsorship goal \$5,000
- Total anticipated gross proceeds \$11,000

Example:

10 teams @ \$125 per team	=	\$1,250
5 Sponsorships at \$250 each	=	\$1,250
5 Sponsorships at \$500 each	=	\$2,500
Donations collected at event	=	\$ 200
Donations collected by team members		
(60 x \$100 (per member))	=	<u>\$6,000</u>
		\$11,200

# Budgeting Expenses

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<input type="checkbox"/> Facility Rental	\$1,000
<input type="checkbox"/> Prizes	\$300
1st Place	\$150
2nd Place	\$100
3rd Place	\$50
<input type="checkbox"/> Signage	\$100
<input type="checkbox"/> T-Shirts	\$240
<input type="checkbox"/> Other	\$100
Total Anticipated Expenses:	<u>\$1,740</u>

Total Anticipated Gross Proceeds:	\$11,200
Total Anticipated Expenses:	\$ 1,740
Total Anticipated Net Proceeds:	\$ 9,460

# KW Cares Bowl-A-Thon Timeline



## 60 Days in advance:

- Submit a Fundraiser Agreement (available on [www.kwcares.org](http://www.kwcares.org)) to KW Cares for approval for the event
- Set a date and time for your event – It is necessary to plan this far in advance due to league play and other special events at bowling alleys. Make your reservation at the bowling alley as soon as you can.
- Set your fundraising goal and establish a budget – Will you seek sponsorships? How much do you hope to raise for KW Cares? How much are you going to charge per team? Is there anything included in the entry fee such as food or a t-shirt? Will you have side events will you have at the bowl-a-thon?
- Brainstorm about possible marketing ideas – Post sponsorships, donations, and the number and names of teams in a public area for all associates to see.
- Start promoting the event by word of mouth – Make announcements at your sales and ALC meetings. Invite neighboring Market Centers.
- Appoint Bowl-A-Thon Event Chair
- Form subcommittees
  - 1) Facility/Food
  - 2) Marketing/Invitations
  - 3) Decorations/Entertainment

## 30 Days in advance:

- Design your promotional materials with desktop publishing – Perhaps place fliers in each associate's mailbox, invite vendors, clients, and other businesses in your building
- Recruit volunteers
- Accept Registration forms
- Promote, promote, promote! Enlist your KW Cares Committee to tell 10 people about the event each day

## 2 to 3 weeks in advance:

- Have a kickoff meeting with teams to discuss how the Bowl-A-Thon will run. Will your event include special prizes such as best dressed team, team with the most donations, etc.?
- Meet volunteers to delegate assignments

## 1 week before event:

- Promote, promote, promote! Encourage everyone to sign up as a team or to come to the event for support. Don't forget to mention the event at your sales meeting to refresh everyone's awareness of the event and the goal to support KW Cares
- Make a list and pack all of your supplies for the event

## Day of the event:

- Make sure you have all of your materials packed for the event
- Make sure volunteers arrive at the bowling alley well in advance of the start time to set-up before teams arrive

# KW Cares Fundraiser Agreement



## KW Cares Fundraiser Agreement

### Contact Information

Contact Name:	Title:
MC or Region* # and Name:	
Address 1:	
City, State, Zip:	
Email:	
Phone:	Fax:

### Event Information

Type of Fundraiser:	Date:
List all activities planned**:	
Will you solicit Sponsorships?	Location:
Estimated Attendance:	Cost per Individual:
Estimated Gross:	
Estimated Direct Costs:	
Estimated Net:	

I, \_\_\_\_\_, hereby request the use of the Keller Williams Realty Cares (KW Cares) name for an independent, third-party fundraising event with the understanding that **100% of the proceeds will be donated to KW Cares.**

As this is an independent fundraiser, I understand that the planning and implementation of the event are the sole responsibility of the sponsoring organization and KW Cares shall be held harmless from any liability in connection with the fundraising event. If the market center's (or region's\*) general liability insurance policy does not cover this event, liability insurance coverage must be purchased and proof of insurance submitted. **The market center (or region\*) will be liable to pay any expenses incurred in excess of gross proceeds from the event.**

I agree that I will make the following disclosure to contributors and sponsors of the event: "KW Cares is an organization described in Section 501(c)(3) of the Internal Revenue Code. Contributions, less the value of any benefits received in exchange for such contributions, are tax deductible to the extent allowed by the IRS Code."

I understand that for KW Cares to issue receipts, all checks for sponsorships, fees, tickets, and donations must be made payable to KW Cares, and that checks to KW Cares must not be deposited in market center (or region\*) accounts. Gross receipts must be received by KW Cares. In the case of major fundraisers such as golf tournaments or galas, etc., KW Cares will work with the market center (or region\*) to pay deposits and expenses. Minor expenses are to be covered by the market center (or region\*) and will be reimbursed upon receipt of the a completed **KW Cares Event Reconciliation Form** that can be located on the KW Cares website [www.kwcares.org](http://www.kwcares.org) under the Fundraising tab. Receipts for all expenses must be submitted to KW Cares with the reconciliation. I agree that the complete reconciliation of the event will be submitted to KW Cares within 30 days of the event. **I understand that the market center (or region\*) will be liable to pay any expenses incurred in excess of gross proceeds from the event.**



# Sample Registration Form



## Team Registration Form

Take it to heart.

Team Name: \_\_\_\_\_

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### TEAM CAPTAIN

NAME: \_\_\_\_\_ ADDRESS: \_\_\_\_\_  
CITY: \_\_\_\_\_ STATE: \_\_\_\_\_ ZIP: \_\_\_\_\_  
PHONE: \_\_\_\_\_ EMAIL: \_\_\_\_\_  
SIGNATURE \_\_\_\_\_ DATE: \_\_\_\_\_

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NAME: \_\_\_\_\_ ADDRESS: \_\_\_\_\_  
CITY: \_\_\_\_\_ STATE: \_\_\_\_\_ ZIP: \_\_\_\_\_  
PHONE: \_\_\_\_\_ EMAIL: \_\_\_\_\_  
SIGNATURE \_\_\_\_\_ DATE: \_\_\_\_\_

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NAME: \_\_\_\_\_ ADDRESS: \_\_\_\_\_  
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PHONE: \_\_\_\_\_ EMAIL: \_\_\_\_\_  
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NAME: \_\_\_\_\_ ADDRESS: \_\_\_\_\_  
CITY: \_\_\_\_\_ STATE: \_\_\_\_\_ ZIP: \_\_\_\_\_  
PHONE: \_\_\_\_\_ EMAIL: \_\_\_\_\_  
SIGNATURE \_\_\_\_\_ DATE: \_\_\_\_\_



# Sample Sponsorship Opportunities



## Sponsor a lane \$250

- Company or Team name printed on flier attached to bowling ball return
- Consider cost and benefit of printing sponsorship banners to hang over the lanes (consult with bowling alley management for approval)



Sample Lane Flier

## Sponsor a team \$125

- Pay the entry fee for a team of six

## Donate a door prize for contestants

- Gift Certificates for movies, restaurants
- Golf passes
- Spa Treatments
- Jewelry
- Family passes to local attraction

## Sponsor T-shirts

- Company or Team name printed on all participant t-shirts — if your committee decides to have t-shirts



Sample T-shirt Back

## General Sponsorship Levels:

- Split — \$125
- Spare — \$250
- Strike — \$500

# Creating Buzz

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Invite everyone in your database!

## Create Competition

- Promote at team meetings and in Market Center newsletters
- Promote on Facebook, Twitter, etc.
- Market Center teams can compete against each other
- Other Market Centers can compete with other teams in the area

Make it an annual event and grow it each year

## Contests

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Award a prize to the player that has collected the most donations

Award a prize to the to the three teams with the highest combined scores

Award a prize for the best team spirit

# Reconciliation



- Collect entry fees from each team or sponsor
- Collect the total donations raised by players at the start of event
- Complete Reconciliation Forms provided with the fundraiser agreement
- \* Send net proceeds check and Reconciliation Forms to KW Cares within 30 days of the event

## Example Reconciliation Form A — Sponsorships

<b>A Revenue from Sponsorships</b>								
Check No.	Sponsor Name	Address	City	State	Zip	Amount	♥Less Value received	Equals tax deductible portion
4594	First Title	4897 Hwy 29	Austin	TX	78746	\$250.00	\$0.00	\$250.00
499763	Keller Williams Region	4841 Park Square	Austin	TX	78746	\$250.00	\$0.00	\$250.00
673	Austin Home Loans	9723 Whitley Road	Austin	TX	78746	\$250.00	\$0.00	\$250.00
45641	Michael Spoon	6384 Sunset Road	Austin	TX	78746	\$250.00	\$0.00	\$250.00
4597	Stacey Hamstead	526 Elm Street	Austin	TX	78749	\$250.00	\$0.00	\$250.00
68756	Second Title	3879 Maple Ave.	Austin	TX	78749	\$500.00	\$0.00	\$500.00
478422	The Best Group	785 Lost Lane	Austin	TX	78704	\$500.00	\$0.00	\$500.00
95238	Austin Partners	4846 Zilker Road	Austin	TX	78704	\$500.00	\$0.00	\$500.00
7893	TX Designers	4891 8th Street	Austin	TX	78746	\$500.00	\$0.00	\$500.00
982248	Keller Williams MC	3985 Cypress Landing	Austin	TX	78746	\$500.00	\$0.00	\$500.00
<b>Total Sponsorships</b>						<b>\$3,750.00</b>		

♥ List the value of what was received in return for the sponsorship (i.e. dinner, bowling, etc.)

# Reconciliation



## Example Reconciliation Form B — Entry Fees

<b>B</b>		<b>Attendee Name</b>	<b>Check No.</b>	<b>Ticket price or entry fee</b>	<b>Quantity purchased</b>	<b>Amount</b>	<b>Less value received ♥</b>	<b>Equals Tax Deductible Donation</b>
1	Team 1		41564	\$125.00		\$125.00	\$125.00	\$0.00
2	Team 2		156	\$125.00		\$125.00	\$125.00	\$0.00
3	Team 3		843	\$125.00		\$125.00	\$125.00	\$0.00
4	Team 4		56796	\$125.00		\$125.00	\$125.00	\$0.00
5	Team 5		497	\$125.00		\$125.00	\$125.00	\$0.00
6	Team 6		4567	\$125.00		\$125.00	\$125.00	\$0.00
7	Team 7		6795	\$125.00		\$125.00	\$125.00	\$0.00
8	Team 8		685	\$125.00		\$125.00	\$125.00	\$0.00
9	Team 9		361	\$125.00		\$125.00	\$125.00	\$0.00
10	Team 10		817	\$125.00		\$125.00	\$125.00	\$0.00
				<b>\$1,250.00</b>			<b>\$1,250.00</b>	

\*\* Attach completed spreadsheet to envelope containing all payments for tickets or entry fees.

♥ List the value of what was received in return for the ticket purchase or entry fee (i.e. dinner, golf, advertising, etc.)

## Example Reconciliation Form C — Donations collected from players/others

<b>Check#</b>	<b>Amount</b>	<b>Donor Name</b>	<b>Address</b>	<b>City</b>	<b>State</b>	<b>Zip</b>
2646	\$100	Kristen Michels	5643 Post Oak	Austin	TX	78746
cash	\$50	Joy Eastman	4567 Park Street	Austin	TX	78746
489	\$25	Clint Stimpson	4891 Sunset Drive	Austin	TX	78746
564	\$25	Joni Kelly	1567 Maple Ave.	Austin	TX	78746
41564	\$600	Team 1 Donations				
156	\$600	Team 2 Donations				
843	\$600	Team 3 Donations				
56796	\$600	Team 4 Donations				
497	\$600	Team 5 Donations				
4567	\$600	Team 6 Donations				
6795	\$600	Team 7 Donations				
685	\$600	Team 8 Donations				
361	\$600	Team 9 Donations				
817	\$600	Team 10 Donations				
<b>Total Received</b>	<b>\$6,200.00</b>					

\*\* Attach completed spreadsheet to envelope containing all donations (including a breakdown of Team donations collected) other than sponsorships, auction purchases and entry fees.

# Reconciliation



## Reconciliation Form D — Event Expenses

<b>D Event Expenses</b>		
<b>Expense</b>	<b>Check #</b>	<b>Amount</b>
Facility Rental	787	\$1,000
Prizes	800, 801, 802	\$300
Signage	790	\$100
T-shirts	791	\$240
other (list)	792	\$100
	<b>Total Expenses</b>	<b>\$1,740.00</b>

**\*\* Attach completed spreadsheet to envelope containing all receipts that are eligible for reimbursement.**

## Reconciliation Form E — Event Reconciliation

### **E Event Reconciliation**

<b>A Revenue from Sponsorships</b>	<b>\$3,750.00</b>
<b>B Revenue from Attendees</b>	<b>\$1,250.00</b>
<b>C Revenue from Other checks</b>	<b>\$6,200.00</b>
<b>Total Revenues</b>	<b>\$11,200.00</b>

LESS

<b>D Total Expenses</b>	<b>\$1,740</b>
<b>Net Proceeds sent to KW Cares</b>	<b>\$1,090.00</b>

Thank you for supporting  
KW Cares



We hope your event is a strike of success!



Take it to heart.