

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 Gala will be Conducted:

- Entertainment
- Meal
- Sponsorship opportunities
- Contests/Awards/Door prizes
- Ticket Sales
- Theme—Masquerade, Tropical, Holiday, Black Tie, Denim and Diamonds, Fashion Victims Ball, Clam bake/Crawfish Boil, Spring Fling, etc.

Set the Fundraising Goal:

- Number expected attendees 100
- What does the registration fee include? (i.e. dinner, open bar, etc.)
- Sponsorship goal \$2,000
- Donations collected from those who can't attend \$250
- Donations and Door Prize money collected at the event \$500
- Total anticipated gross proceeds \$13,000

Example:

100 Attendees @ \$100 each	=	\$10,000
2 Sponsorships at \$500 each	=	\$ 1,000
1 Sponsorships at \$1,000	=	\$ 1,000
Door Prize Cash	=	\$ 500
Donations collected at event	=	\$ 250
Donations collected by associates who could not attend	=	\$ 250
		\$13,000

*Goals are examples. Please set goals based on your market center's capabilities.

Budgeting Expenses



<input type="checkbox"/> Facility Rental	\$1,500
<input type="checkbox"/> Catering/Rentals	\$4,500
<input type="checkbox"/> Prizes for dancing contest	\$225
1st Place	\$100
2nd Place	\$75
3rd Place	\$50
<input type="checkbox"/> Signage	\$100
<input type="checkbox"/> Decorations	\$300
<input type="checkbox"/> DJ	\$175
<input type="checkbox"/> Insurance	\$100
<input type="checkbox"/> Other	\$100
Total Anticipated Expenses:	\$7,000

Total Anticipated Gross Proceeds:	\$13,000
Total Anticipated Expenses:	\$ 7,000
Total Anticipated Net Proceeds:	\$ 6,000

KW Cares Gala Timeline



60 Days in advance:

- Submit a Fundraiser Agreement (available on 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 other special events. Make your reservation 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 person? Is there anything included with the purchase of a ticket such as dinner? Will you have side events at the gala like a dance contest?
- 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 Gala 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 RSVP's
- 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 meeting with the committee for an update on the schedule of events.
- Meet with volunteers to delegate assignments

1 week before event:

- Promote, promote, promote! Encourage everyone to RSVP. 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



Take it to heart.

KW Cares Fundraiser Agreement

Contact Information

Contact Name:	Title:
MC or (or Region)* Number and Name:	
Address:	
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 Proceeds:	
Estimated Direct Costs:	
Estimated Net Proceeds:	

The _____ Market Center (or Region), hereby requests the use of the Keller Williams Realty Cares (KW Cares) name for an independent, third-party sponsored fundraising event with the understanding that **100% of the proceeds will be donated to KW Cares**. KW Cares is an organization described in Section 501(c)(3) of the Internal Revenue Code and is located in Austin, Texas. KW Cares grants Market Center (or Region) the right to use the KW Cares name for an independent, third-party sponsored fundraising event with the understanding that 100% of the proceeds will be donated to KW Cares.

As this is an independent fundraiser, Market Center (or Region) agrees and understands that the planning and implementation of the event are the sole responsibility of Market Center (or Region). Market Center (or Region) will be liable to pay any expenses incurred in excess of gross proceeds from the event.

Liability Insurance: 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 to KW Cares.

Disclosure: Market Center (or Region) agrees that it will disclose to contributors and other sponsors of the event that KW Cares is an organization described in Section 501(c)(3) of the Internal Revenue Code and that contributions, less the value of any benefits received in exchange for such contributions, are tax deductible to the extent allowed by the IRS Code.

Disclosure statement: Market Center (or Region) agrees to submit a disclosure statement specific to the contributions that will be made as a result of this event to KW Cares for approval prior to the event (see examples*** on p. 2). Market Center (or Region) agrees that a disclosure statement approved by KW Cares shall be provided to all event contributors.

Management of event funds and reconciliation: Market Center (or Region) understands 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

Event Invitation



You have been invited by Keller Williams Realty Austin to
The KW Cares Dinner and Dancing Gala, hosted by Keller Williams Realty Austin.



Date: Dec 5, 2009

Time: 6:00 PM

Location: Austin Hotel Ballroom

[VIEW INVITE](#)

REPLY HERE

Yes No Maybe

Total guests (including you)

Add a comment (optional)

Notify me when guests reply

Are you going to participate in the dance contest?

(Select One)

Do you have a dance partners?

(Select One)

[REPLY NOW](#)

The KW Cares Dinner and Dancing Gala

Print Invitation

Host: Keller Williams Realty Austin

Location: Austin Hotel Ballroom [SEND TO PHONE](#)
8789 First Street
Austin, TX 78704 US
[View Map](#)

When: Saturday, December 5, 6:00PM [Add to my Outlook Calendar](#)

Phone: 512-555-5555

Please join us for a night of dinner and dancing to raise money for KW Cares. Tickets for the event are \$100 per person and include a \$25 tax-deductible donation to KW Cares.

Please call 512-555-5555 or email Jane at jane.doe@kw.com to make your payment.



Event Invitation



Join us for Dinner & Dancing

Please join us for a night of dinner and dancing to raise money for KW Cares.



Tickets for the event are \$100 per person and include a \$25 tax deductible donation to KW Cares.

Austin Hotel Ballroom
December 5, 2009
6:00 p.m.



Please call 512-555-5555 or email Jane at Jane.doe@kw.com to RSVP and make your payment.

Event Tickets

ADMIT ONE



Dinner and Dancing
Gala for KW Cares

Austin Hotel Ballroom
December 5, 2009
6:00 p.m.



Tickets to the event are \$100 per person and include a \$25 tax deductible donation to KW Cares

Sample Sponsorship Opportunities



Silver Sponsor \$500

- Company or Team name printed on program, welcome signs
- Receive two complementary tickets to the gala

Gold Sponsor \$1,000

- Title of the VIP table
- Company or Team name printed on program, welcome signs
- Receive four complementary tickets to the gala

Donate a door prize

- Gift Certificates for movies, restaurants
- Golf passes
- Spa Treatments
- Jewelry
- Family passes to local attraction
- Company or Team name printed in front of respective door prize

Creating Buzz



Invite everyone in your database!

Promotion

- Promote at team meetings and in market center newsletters
- Promote on Facebook, Twitter, etc.
- Invite associates from surrounding market centers

Make it an annual event and grow it each year

Contests and Door Prizes

Have a dance contest and award cash prizes to the top three couples

Give one door prize ticket to each attendee. Sell additional tickets at the door for \$5 each

Reconciliation



- Collect entry fees from each attendee and door prize money at the event
- Collect the total donations raised by associates unable to attend and from sponsorships
- Complete Reconciliation Forms provided with the fundraiser agreement
- Send net proceeds check and Reconciliation Forms to KW Cares within 30 days of the event — **REQUIRED**

Example Reconciliation Form A — Sponsorships

A Revenue from Sponsorships								
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	\$500.00	\$150.00	\$350.00
	673 Austin Home	9723 Whitley Road	Austin	TX	78746	\$500.00	\$150.00	\$350.00
	982248 Keller Williar	3985 Cypress Landing	Austin	TX	78746	\$1,000.00	\$300.00	\$700.00
Total Sponsorship						\$2,000.00		

♥ List the value of what was received in return for the sponsorship (i.e. admission to event, name placement, etc.)

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

Reconciliation



Example Reconciliation Form B — Registration Fees

B		Revenue from Ticket Sales / Entry Fees									
Attendee							Check	Ticket	Qty.	Less value	Equals Tax
Name	Address	City	State	Zip	No.	price	sed	Amount	received ♥	Deductible Donation	
1	Robert Johnson	1245 Elm Street	Austin	TX	78746	4563	\$100.00	2	\$200.00	\$150.00	\$50.00
2	Michael Frees	5876 Main Street	Austin	TX	78746	123	\$100.00	2	\$200.00	\$150.00	\$50.00
3	Eric Davis	78 East Road	Austin	TX	78746	456	\$100.00	2	\$200.00	\$150.00	\$50.00
4	Cameron Rogers	985 Overlook Pass	Austin	TX	78746	789	\$100.00	2	\$200.00	\$150.00	\$50.00
5	Joy Eastman	4567 Park Street	Austin	TX	78746	cash	\$100.00	2	\$200.00	\$150.00	\$50.00
6	Elsa Johnson	1245 Elm Street	Austin	TX	78746	4563	\$100.00	4	\$400.00	\$300.00	\$100.00
7	Steve Ekertson	879 Lost Oak Way	Austin	TX	78746	cash	\$100.00	2	\$200.00	\$150.00	\$50.00
8	James Jackson	5470 Sunset Circle	Austin	TX	78758	958	\$100.00	8	\$800.00	\$600.00	\$200.00
9	Brent Simmons	9835 Hidden Lakes	Austin	TX	78795	3322	\$100.00	2	\$200.00	\$150.00	\$50.00
10	Sharon Vost	2358 Maple Lake	Buda	TX	78658	cash	\$100.00	4	\$400.00	\$300.00	\$100.00
11	Lauren Jones	634 Pate Orr Road	Austin	TX	78746	321	\$100.00	4	\$400.00	\$300.00	\$100.00
12	Justin Jarvis	9733 Orchard Lane	Oak Hill	TX	78763	495	\$100.00	2	\$200.00	\$150.00	\$50.00
13	Krista Baker	3249 Cherry Grove	Oak Hill	TX	78763	993	\$100.00	2	\$200.00	\$150.00	\$50.00
14	Lance Carson	6524 Pearson Road	Austin	TX	78746	287	\$100.00	4	\$400.00	\$300.00	\$100.00
15	Megan Best	9864 Florence Road	Austin	TX	78746	6789	\$100.00	2	\$200.00	\$150.00	\$50.00
16	Angela Crews	9148 Shady Grove	Oak Hill	TX	78763	487	\$100.00	4	\$400.00	\$300.00	\$100.00
17	Mason White	2488 Central Blvd.	Austin	TX	78746	3322	\$100.00	2	\$200.00	\$150.00	\$50.00
18	Maggie Davis	16873 Caylor Road	Austin	TX	78744	4652	\$100.00	10	\$1,000.00	\$750.00	\$250.00
19	Nick Daniels	6314 Chestnut Lane	Buda	TX	78658	cash	\$100.00	2	\$200.00	\$150.00	\$50.00
20	Zach Avery	3948 Hwy. 114 E	Austin	TX	78677	7552	\$100.00	6	\$600.00	\$450.00	\$150.00
21	Jenna Hernandez	8384 Whitley Road	Austin	TX	78744	3224	\$100.00	4	\$400.00	\$300.00	\$100.00
22	Rick Henderdon	1245 Blanco Road	Buda	TX	78658	cash	\$100.00	2	\$200.00	\$150.00	\$50.00
23	Haley Post	1837 Guadalupe Road	Austin	TX	78746	457	\$100.00	2	\$200.00	\$150.00	\$50.00
24	Lou Dempsey	2115 Heritage Way	Austin	TX	78746	876	\$100.00	4	\$400.00	\$300.00	\$100.00
25	Gwen Lane	4998 Shady Grove	Oak Hill	TX	78763	522	\$100.00	2	\$200.00	\$150.00	\$50.00
26	Jordan Westerly	7563 Ottinger Road	Austin	TX	78755	214	\$100.00	2	\$200.00	\$150.00	\$50.00
27	Trent Groves	3575 North Park Ave.	Austin	TX	78677	567	\$100.00	4	\$400.00	\$300.00	\$100.00
28	Michael Garcia	2737 Flynn Street	Austin	TX	78746	2242	\$100.00	8	\$800.00	\$600.00	\$200.00
29	Teresa Stamps	3938 Connor Pass	Austin	TX	78777	714	\$100.00	2	\$200.00	\$150.00	\$50.00
30	Stacey Williams	920 Western Trail	Austin	TX	78749	168	\$100.00	2	\$200.00	\$150.00	\$50.00
Totals								100	\$10,000	\$7,500	

♥ List the value of what was received in return for the ticket (i.e. admission to event, dinner, etc.)

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

Reconciliation



Example Reconciliation Form C — Donations/ Door Prize monies collected

C Revenue - from other donations						
Check#	Amount	Donor Name	Address	City	State	Zip
2646	\$100	Kristen Michaels	5643 Post Oak	Austin	TX	78746
564	\$25	Joni Kelly	1567 Maple Ave.	Austin	TX	78746
489	\$50	Clint Stimpson	4891 Sunset Drive	Austin	TX	78746
7854	\$75	Allison Cope	3493 Outlook Drive	Austin	TX	78746
	\$250	Collected Before Event				
cash	\$20	Joy Eastman	4567 Park Street	Austin	TX	78746
4565	\$100	Robert Johnson	1245 Elm Street	Austin	TX	78746
cash	\$50	Maggie Davis	16873 Caylor Road	Austin	TX	78744
498	\$50	Justin Jarvis	9733 Orchard Lane	Oak Hill	TX	78763
570	\$20	Trent Groves	3575 North Park Ave.	Austin	TX	78677
cash	\$10	Becca Richards	5248 Smithfield Lane	Ausitn	TX	78746
	\$250	Collected at Event				
Total Donations		\$500				
	\$500	Door Prize Monies*	*NOT a tax deductible donation			
Total Monies		\$1,000				

** Attach completed spreadsheet to envelope containing all donations and door prize money.

Reconciliation Form D — Event Expenses

E Event Expenses		
	Check #	Amount
Facility Rental	5548	\$1,500.00
Caterer	5550	\$4,500.00
Event Insurance	5547	\$100.00
Entertainment	5553	\$175.00
Decorations	5559	\$300.00
other (list)		
Signage	5558	\$100.00
Dancing Contest	5575	\$225.00
Overages	5574	\$100.00
Total Expenses		\$7,000.00

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

Reconciliation



Reconciliation Form E — Event Reconciliation

E Event Reconciliation		Enter total box from each spreadsheet here
A	Revenue from Sponsorships	\$2,000.00
B	Revenue from Attendees	\$10,000.00
C	Revenue from Other checks	\$1,000.00
Total Revenues		\$13,000.00
	LESS	
D	Total Documented Expenses	\$7,000.00
Net Proceeds sent to KW Cares		\$6,000.00

Thank you for supporting
KW Cares!!