



KW Cares

**Third-Party
Event
Playbook**



KW Cares Third-Party Event Playbook

Welcome & Purpose

Thank you for choosing to host a fundraising event in support of KW Cares. Your efforts help us fulfill our mission of supporting Keller Williams associates and their families in times of need. This playbook will guide you through planning and executing a successful event on our behalf. We're here to provide the tools, resources, and support you need while giving you flexibility to make your event unique and impactful.

Before you begin, please reach out to our development team, so we can assist you. Email us at kwcares@kw.com.

Getting Started

Event Ideas

- Dinners or luncheons
- Silent auctions
- Golf tournaments
- Fitness challenges or walks/runs
- Peer-to-peer fundraising campaigns
- Themed parties or galas

First Steps Checklist

1. Choose your event type and date.
2. Ask for help – create an event committee with tasks

3. Secure a venue (in-person or virtual).
 4. Define your audience (who you'll invite).
 5. Set a fundraising goal.
 6. Review this playbook to align with KW Cares guidelines.
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Roles & Responsibilities

Host Responsibilities

- Planning and executing the event (venue, logistics, volunteers).
- Determine how you will budget including covering event expenses (unless sponsored or offset).
- Ensuring compliance with local regulations (permits, insurance, raffles, alcohol).
- Sign and send KW Cares the Event Agreement Form.
- Collecting and submitting donations promptly.

KW Cares Provides

- Branding and messaging guidelines.
- Individual and peer-to-peer fundraising pages, auction software.
- Donation processing and tax receipting for gifts submitted properly. Must include donor name, address, email and donation amount.
- Guidance and support from our team.
- Simple budget template and reconciliation worksheet.
- KW Cares One-Pager, W-9, IRS and sales-tax information as well as other documents as needed.

What KW Cares Cannot Provide

- Financial underwriting for event costs.
- Event staffing or volunteers.
- Permits, licenses, or insurance coverage.

Event Planning Guide

Suggested Timeline

- 6–8 Months Out: Choose event type/date, secure venue, set goal. Begin outreach to potential sponsors.
- 4 Months Out: Launch invitations/marketing, recruit volunteers. Promote sponsors according to the benefits promised.
- 2 Months Out: Confirm logistics.
- 1 Month Out: Finalize program, test donation platform.
- Day Before: Set up materials, confirm staff/volunteers, run-through agenda.
- Day Of: Execute event, collect donations, thank attendees.
- Post-Event (1 week): Submit funds, send thank-you notes, share recap with KW Cares. Provide sponsors with an overview of benefits received.

Budget & Expenses

- Create a simple budget (venue, food, printing, AV).
- Seek sponsorships or in-kind donations (e.g., food, prizes, space).
- Keep costs low to maximize funds raised.

Compliance & Donations

- Ensure proper permits/licenses if serving alcohol, hosting raffles, or closing streets.
- Donations should be collected via the KW Cares platform when possible.
- Checks should be made payable to KW Cares and mailed to: 1221 South Mopac Expressway Suite 400, Austin TX 78746