



# CALIFORNIA COUNCIL OF NAIW, INT'L FUNDRAISING BEST PRACTICES



[cacouncilnaiw.com](http://cacouncilnaiw.com)

# Bookmark Fundraiser

Is there a Theme? Bookmark Fundraiser

Is there a certain month of time of the year best implemented? Yes- mail out 3 months prior to drawing. Coordinated so drawing would be at Leadership Workshop

How many members are required? Used Steering committee (10 members) recommend minimum of 3

What materials are required? Graphic Design  
(Detailed information) Paper products

What is the time frame for preparation? Allow 30 days

Steps to carry out the event: Mailing list for CA Members; Cover letter & Envelopes; return envelopes, team to fold, stuff, stamp & mail  
(In detail)

See attached document: Cover letter & fund report

# It's Fresno Time in 2009

*Dear Friends and fellow members*

*The Insurance Women of Fresno will be hosting the 2009 California State Meeting on September 11 & 12<sup>th</sup>.*

*As we move through these financial times we realize fund raising has it challenges. Our supporters are not able to be as generous as in past years. It is with this thought in mind we come to you with our gift of a special bookmark.*

*In exchange for this gift we are accepting all monetary contributions to assist the State Meeting Committee to move forward with their plans for a grand meeting.*

*We hope you use and enjoy this small token of our committee and thank you for your participation in our "Bookmark Fundraiser". All respondents will have their name placed in a drawing to win one of TWO FREE REGISTRATIONS.*

*Complete the bottom of this letter and return to us with your check in the provided envelope. The winners of the two free registrations will be announced during the July Leadership meeting. Should you not be at the meeting you will be contacted by mail or phone.*

*We look forward to seeing you at the California State Meeting in September. We also encourage you to bring a fellow member to share the good times, great friendships and educational opportunities.*

*Thank you for your participation.*

Enclosed is my contribution of \$ \_\_\_\_\_ to support our State Council Meeting.  
Make check payable to "IWOF CA Council 2009"

Name \_\_\_\_\_ tel \_\_\_\_\_

Address \_\_\_\_\_

Email \_\_\_\_\_ Association \_\_\_\_\_

*Insurance Women of Fresno, P. O. Box 25276, Fresno, CA 93729-5276*



# Bunco

Is there a Theme?	Can be a Spring, Mardi Gras, St.Patrick's Day, Halloween or Holiday Bunco or any other theme
Is there a certain month of time of the year best implemented?	Any month. Can have Bunco in place of monthly meeting
How many members are required?	Need participation from all members
What materials are required? (Detailed information)	Venue to play Bunco rules – can be found on the internet Bunco dice – 3 per table Score sheets – 1 per player Score Pads – 1 per table Pencils – several per table Table Snacks Card tables and chairs Raffle Tickets Opportunity Prizes
What is the time frame for preparation?	One evening event about 4 hours

## Steps to carry out the event:

(In detail)

1. Assign Bunco committee for donations, reservations, food and beverages, tables and chairs
2. Decide on dinner menu and theme
3. Determine cost to play
4. Determine the cash amount for prizes such as Most Bunco's, Most Wins, Most Losses and Last Bunco
5. Send out flyer and invitations
6. Have sign up sheets for food, beverages, card tables and chairs at meetings
7. Arrange for a certificate of insurance from National
8. All members ask for donations from a carrier, company or local business and all members bring at least one raffle
9. Order food
10. Keep a list of reservations and who paid in advance

### On day of the event:

1. Need members to volunteer to pick up and set up food, chairs, tables and decorations
2. Make and display a Sponsor list
3. Have item such as a hat or balloon to give to players that roll a Bunco
4. Need one person as a greeter
5. Need at least two people at the registration table
6. Need volunteers to sell opportunity drawing tickets and manage raffle prizes
7. All members in attendance stay and clean up

### After event:

1. Assign member to send thank you letters to all sponsors
2. Publish sponsors on association web sites and in newsletters

Submitted by Insurance Women of North San Diego County

## CE Class Fundraising

Is there a Theme?	CE Classes – we hold 1 CE class on the 3 <sup>rd</sup> Thursday of each month beginning January – May.
Is there a certain month of time of the year best implemented?	We start working on obtaining CE instructors over the summer months, lock them in by September-November.
How many members are required?	2 or 3
What materials are required? (Detailed information)	Contact community center for a room. We hold our CE classes in a library room. We keep an email list of all providers and attendees.
What is the time frame for preparation?	3-4 months.
Steps to carry out the event: (In detail)	Obtain a facility to hold the classes. We range from 35-45 in attendance. We ask our members to sign up to bring the dinner for one of the 5 monthly classes. Members are reimbursed from the funds raised for the classes. We charge \$30 for NAIW members & NAIW member co-workers. Non-NAIW members are charged \$40. We usually order pizza, subway sandwiches, or Rascal's Teriyaki Chicken Salads, Costco Cookies & beverages are purchased. One member is asked to handle the sign-in table; one to volunteer to bring the dinner; one to obtain the CE instructors; one to contact the library & handle the contract; and one member to print the sign-in sheets.

Submitted by South Bay Chapter of NAIW

# Glo Ball Golf Tournament

Who is the audience? NAIW members, potential members, carriers, vendors

What is the purpose? Fund raising for designated Charity and also Council meeting for 2011

What is the preparation? Book the Course- Calculate the minimum cost needed to break even. Decide Sponsor potential, maximum amount of golfers the course will allow before it gets too time cumbersome

What materials are required? Most items are supplied by the Golf Course itself, such as dinner, the glow balls, etc. We will need to supply "goody" bags, signs for th hole sponsors, raffle prizes (need the raffle tickets as well),

What is the time frame? Advertisement of event needs to start 2 months prior to the event- dinner on night of event lasts 1 hour- tournament lasts 2-2.5 hours- then afterparty with raffle takes about 45 minutes

Steps to carry out the event:

- 1) Determine Best Date for tournament
- 2) Determine Cost per golfer, hole sponsor amount, various sponsor opportunities
- 3) Set deadlines for sponsors, hole sponsors, golfers, gift donations
- 4) Book Course and pay deposit, make sure all deadlines for balance are known to all boardmembers
- 5) Send out flyers to all known contacts
- 6) Get membership involved in word of mouth- getting their employers, carriers, friends to book or come to dinner
- 7) Start calling sponsors to get interest on sponsorship

opportunities

8) Start calling & collecting donated prizes for the raffle

9) Contact designated Charity spokesperson to let them know the date of the event and see if they would like to attend

10) Get list of all hole sponsors to sign company by date of deadline

11) Get list of all sponsors to sign Company by date of deadline

12) Get list of all prize donators to sign company by date of deadline

13) Determine the golf foursomes

14) Determine which members on the volunteer squad will be doing what

15) Day of the event-get the prizes, signs, goody bags to the course 45 minutes prior to start of event

16) Set up registration with a minimum of 3 members working the sign in, collection of money, selling of raffle tickets, etc.

17) Start Dinner promptly

18) Do shot gun start promptly

19) Make sure thank you notes go out advising the amount of money that was raised for the Charity

Submitted by San Diego Insurance Women

**CASINO NIGHT 2009 - VOLUNTEER FORM**

**When:**

**Where:**

**If you are interested in serving on a committee for the \_\_\_ Casino Night, please complete this form and forward to Casino Night Chair:**

**Chair Name**

**E-Mail: [Chair](#) Email or Fax: \_\_\_\_\_**

**For questions, contact \_\_\_ at \_\_\_\_\_ or contact the applicable Committee Chair.**

**VOLUNTEER INFORMATION**

**Name:**

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**Phone:**

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**E-mail:**

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**CHECK COMMITTEE(S) OF INTEREST**

**COMMITTEE CHAIR**

<input type="checkbox"/>	Decorations	
<input type="checkbox"/>	Reservations/Hostess	_____
<input type="checkbox"/>	Invitation/Program	_____
<input type="checkbox"/>	Table Sponsors	_____
<input type="checkbox"/>	Grand Prize	_____
<input type="checkbox"/>	Silent Auction	_____
<input type="checkbox"/>	Raffle "Chance Drawing" Prizes	_____
<input type="checkbox"/>	Bingo	_____

Following is a brief explanation of the areas that help is needed. In addition to these duties, each committee will be responsible to provide a financial report of income, expenses and/or donation values to the Casino Night Chair. For additional information or specific needs, please speak with the Committee Chair.

- **DECORATIONS** - Gather supplies, assemble table arrangements and/or decorate the day of the event.
- **RESERVATIONS/HOSTESS** - Put the Reservation List together which will be used for check in the night of the event. If assigned seating, come up with a seating arrangement. Check people in the night of the event, collect payments from people that did not pay in advance, sell drink tickets and additional script.
- **INVITATION/PROGRAM** - Mail out invitations and coordinate with the Reservations/Hostess committee for follow up contact.
- **TABLE SPONSORS** - Mail a letter to past sponsors and any additional company's we are requesting sponsorships from. Make follow up phone calls and collect payments from the sponsors.
- **GRAND PRIZE** - Volunteers (a.k.a. the entire membership) sell Grand Prize Raffle tickets.
- **SILENT AUCTION** - Mail a letter and/or contact parties for donations. Set up the silent auction tables the night of the event and coordinate closing the tables and collecting payments. Obtain value of each donation.
- **RAFFLE "CHANCE DRAWING" PRIZES** - Request and collect Raffle "Chance Drawing" Prizes that are given out as prizes for gambling winnings. Obtain the value of each item donated.
- **BINGO** - Collect donations for prizes.

**CASINO NIGHT CHECKLIST**

<input type="checkbox"/>	Decide on Theme	
<input type="checkbox"/>	Decide on Space	_____
<input type="checkbox"/>	Decide on Caterer	_____
<input type="checkbox"/>	Arrange Gaming Table/DJ/Entertainment	_____
<input type="checkbox"/>	Decide on Grand Prize	_____
<input type="checkbox"/>	Review with Board	_____
<input type="checkbox"/>	Reserve Space	_____
<input type="checkbox"/>	Choose Linens (colors)	_____
<input type="checkbox"/>	Decide on Menu	_____
	(Some facilities will work with you to include Bar Receipts)	_____
	IF DURING LENT, OBTAIN A LENT FRIENDLY OPTION	_____
	Confirmed event not during lent	_____
		_____
<input type="checkbox"/>	Reserve Gaming Tables/DJ/Entertainment	_____
<input type="checkbox"/>	Order Grand Prize Tickets	_____
<input type="checkbox"/>	Determine Pricing for Flyer	_____
<input type="checkbox"/>	Review with Board	_____
<input type="checkbox"/>		
<input type="checkbox"/>	Select/Create Committees	COMMITTEE CHAIR
<input type="checkbox"/>	Decorations	_____
<input type="checkbox"/>	Reservations/Hostess	_____

<input type="checkbox"/>	Invitation/Program	_____
<input type="checkbox"/>	Table Sponsors	_____
<input type="checkbox"/>	Grand Prize	_____
<input type="checkbox"/>	Silent Auction	_____
<input type="checkbox"/>	Raffle "Chance Drawing" Prizes	_____
<input type="checkbox"/>	Bingo	_____
<input type="checkbox"/>		_____

Provide Details to Bulletin Chair

Date / Facility

Flyer

Create Flyers (Need to have pricing determine as well as return by date so reservation list can be created)

Include Disclaimer: CANCELLATIONS NOT MADE PRIOR TO \_\_\_\_\_ ARE CHARGEABLE.

- Obtain/Update Friends List
- E-Mail Flyers to Members and Friends
- Mail Flyers to Members and Friends that do not have e-mails on file
- Provide Extra Flyers to Members to hand out/post at their offices
- Run Article(s) in Various Papers/On-Line/Radio Announcing Event

### CASINO NIGHT CHECKLIST

- Write Program
- Confirm Menu and Reservations with Caterer
- Confirm Linens, Reservations, Etc. with Facility
- Create Reservations List
- Indicate those Paid / Highlight Unpaid (paid at the door)
- Give Checks to Treasurer
- Create Attendee List for Hostesses to Check-In Guests
- Create Seating Chart
- Report progress to Board and Membership on several occasions
- Make sure Historian is attending and will take pictures. If not, assign someone else to take pictures to provide to Historian.
- Create Final Report with Financial Information and present it to the Board.
- Mail out Thank You Cards

Submitted by Insurance Women of Fresno