CNH District of Circle K International

Treasurer/Fundraising Manual

Revised June 2018

CKI Circle K International

Hello, Treasurers and Fundraising Chairs!

My name is Shaira Ramirez-Santos, and I am extremely honored to be serving as your District Treasurer for the 2018-19 Cal-Nev-Ha Circle K term! The three years I've spent in this organization have allowed me to meet some of the most hardworking, inspiring individuals I've ever seen, and the dedication and passion of our members continually blow me away. My experience as UC Berkeley's Fundraising Chair and as a past member of the District Finance & Fundraising Committee have taught me a lot, and while I know that our jobs aren't easy, I also know that great things are in store for all of us this term.

This year, one of my goals is to ensure that all Treasurers and Fundraising Chairs from our district feel both confident and capable throughout their terms. I hope that you will feel comfortable reaching out to me for any questions or concerns you have regarding your position. I want to serve you all and act as a resource to club members, boards, divisions, and our district whenever you need me. Ask me about budgeting and dues, talk to me about our District Fundraising Initiatives, or geek out with me about Harry Potter. Regardless of whether it is about Circle K, school, or life, I want to be your support system throughout this coming year!

This manual is a compilation of basic duties and ways to go above and beyond your role as a Treasurer or Fundraising Chair. It has been created and updated by District Treasurers and the Finance and Fundraising Committee for years; if you have any additional content that you believe would be a significant asset to this manual, feel free to contact me!

You are a part of an amazing group of individuals who will accomplish great things this year. Together, we will break records and make this term one for the books. I can't wait to see all the incredible things you'll do this year, CNH!

Shaira Ramirez-Santos

2018-19 CNH Circle K District Treasurer
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MEMBERSHIP DUES | INTRODUCTION

In the fall, your number one priority as Treasurer is collecting membership dues! Why is this important? Well, here are a few reasons…

1. Paying dues on time ensures that your club continues to be officially recognized by Circle K International.
2. Only dues-paid members count in the "official" number of members we have in the CNH District. We've already reached over 3,000 members… let's shoot for even more!
3. Members cannot enjoy all the benefits of Circle K until they pay dues!
4. Collecting dues in the fall saves A LOT of trouble later when members sign up for District events like Fall Training Conference and District Convention, since all attendees must be dues-paid.
5. Part of membership dues may go towards financially supporting the club, such as service projects and/or fundraisers.

(Need tips on recruitment? Contact our District MD&E Chair, Tommy Thach, at mde@cnhcirclek.org!)

The next few sections will guide you in determining how much dues should be and how to submit these dues to Circle K International. Remember that each club has different needs, so please make sure to contact the District Treasurer if you have any questions about this portion of the manual!

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MEMBERSHIP DUES | DUES STRUCTURE

At a minimum, all Circle K clubs must pay the International and District Fees. For most Circle K clubs, this means charging club members a fee that incorporates both the District Fee per member and a small portion of the International Club Fees. After entering contact information for all dues-paid members onto the Membership Update Center (explained on page 8), a total amount to be sent to Circle K International will be generated.

The International Fee must be sent with the first payment, and the District Fee will be included for each member that is inputted into the Membership Update system.

CAL-NEV-HA CIRCLE K DUES STRUCTURE			
Type of Institution	International Fee	District Fee	Minimum Membership
2-Year Institutions	$300	$9/member	10
4-Year Institutions with less than 5,000 students	$450		
4-Year Institutions with 5,000 students or more	$600		15
District and International fees go towards organizing District and International events, paying administrative and travel costs, marketing Circle K in general, providing insurance for all Circle K members, and helping to charter clubs around the world!			

In order for a Circle K club to remain within **GOOD STANDING**, it must pay the International fee plus the District fee for the minimum amount of members listed in the table above any time between **OCTOBER 1ST – NOVEMBER 30TH**.

Any club that does not pay its first batch of dues by November 30th will obtain the status of **SUSPENDED.** Clubs with **SUSPENDED** status that do not pay dues for an additional year will be deemed **INACTIVE** and become subject to a reactivation fee. Please contact the District Treasurer if your club needs to be reactivated!

As a reminder, all members who wish to attend district events such as Fall Training Conference and District Convention (with the exception of Crazy Kompetition for Infants) must be dues-paid!

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MEMBERSHIP DUES | DECIDING DUES

The main idea to keep in mind is that MEMBERS should decide club dues—not the board. As previously mentioned, club dues must incorporate District and International Fees. Below are some factors for members to consider when deciding on club dues. However, remember to emphasize that a portion of membership dues goes back to the club for service and leadership opportunities.

1. The financial stability of your club. Does your club need to increase membership dues to cover administrative costs? Remember that higher club dues may deter some potential members from wanting to join and pay! (Be sure to advertise membership benefits well.)
2. The amount of paid and unpaid members from previous years. Was there a large group of members in the previous year who could not pay because they thought dues were too high? Take this into consideration.
3. College budgets. How much would a college student really be willing to pay to join a student organization?
4. T-shirts. Many clubs include the fee of t-shirts in their membership dues. Make sure to include information about this on the membership form.
5. How will you pay for the International fee? Some Kiwanis clubs may pay this fee, and Circle K clubs often fundraise for this amount so their members do not have to pay extra.

A simply way to determine the price of dues for your club can be found utilizing the following formula:

$$\frac{\textit{(International Fee + (Estimated \# of members x \$9))}}{\textit{(Estimated \# of members)}}$$

For example, if you attend a 4-Year university with more than 5,000 enrolled students and you estimate that you will have 50 members, your formula would look like this:

$$\frac{(\$600 + (50 \times \$9))}{50} = \textbf{\$21/member}$$

Note: If your club board decides to make any changes to the price of club dues, the new amount **MUST** be approved by an affirmative 2/3 vote of at least 50% of the membership. Try to finalize this amount by the end of spring to be ready for fall. If no changes are made, no other administrative actions must be taken.

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MEMBERSHIP DUES | MEMBER BENEFITS

Remember to talk to members about what would motivate them to pay dues, and then explain what Circle K does to accomplish that. If you have trouble listing more reasons, think about your own reason for paying dues and the benefit you get from being a part of Circle K! To encourage members to join Circle K, read this sample list of membership benefits.

WHY SHOULD I PAY DUES AND JOIN CIRCLE K?

1. If you were in Key Club or KIWINs, this is the perfect opportunity to continue within the Kiwanis Family. Even if you had little or no involvement in high school, Circle K is a great place to start!
2. Each new member receives a set of membership materials, including a pin and membership card.
3. A portion of each member's dues can go toward funding service projects and fundraisers on the club level.
4. All dues-paid Circle K members are eligible to apply for scholarships offered by Circle K and Kiwanis.
5. Meet members from all over the District! This is where interclub events come into play!
6. Networking with Circle K and Kiwanis members across the Cal-Nev-Ha District may prove beneficial in the professional world.
7. All dues-paid Circle K members are eligible to run for office on the District and International level.
8. Participants in all District events such as Fall Training Conference and District Convention must be dues-paid. Workshops, icebreakers, and other fun activities await!
9. Through hosting workshops and chairing projects, there are many opportunities to development your leadership abilities throughout the year.
10. Life-long friendships <3

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MEMBERSHIP DUES | SUBMITTING DUES

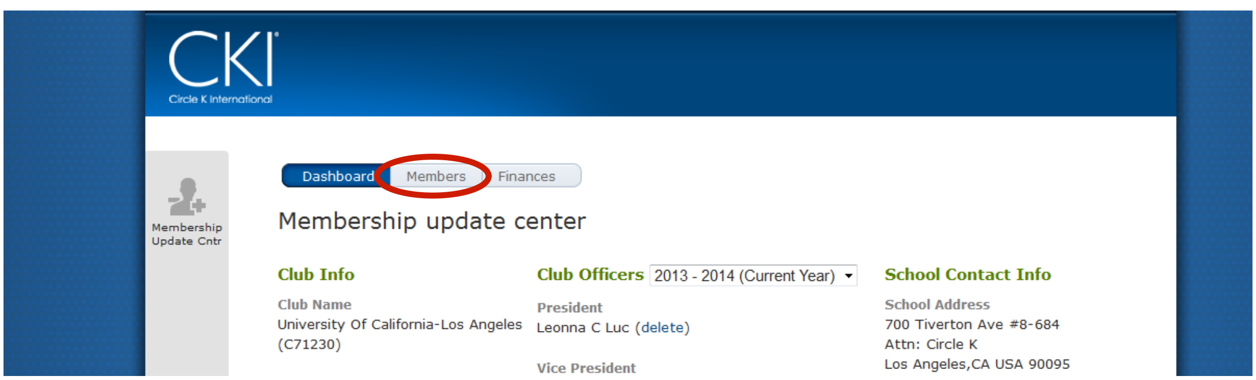
The Membership Update Center is an important tool for the Treasurers to utilize to maintain and manage their roster so that members can become officially recognized. The following section will teach you how to submit International and District dues after you have collected them from your members.

1 Go to www.circlek.org and click on "MEMBERSHIP UPDATE."

2 Log in using your faculty advisor's e-mail and password. (This may also be your club's Secretary or Treasurer e-mail account login.) If you do not have this from your predecessor or cannot find it, please contact the District Treasurer.

3 Once logged in, click the Membership Update Center button on the left side.

4 On the next page, verify your club's information, then select "Members".



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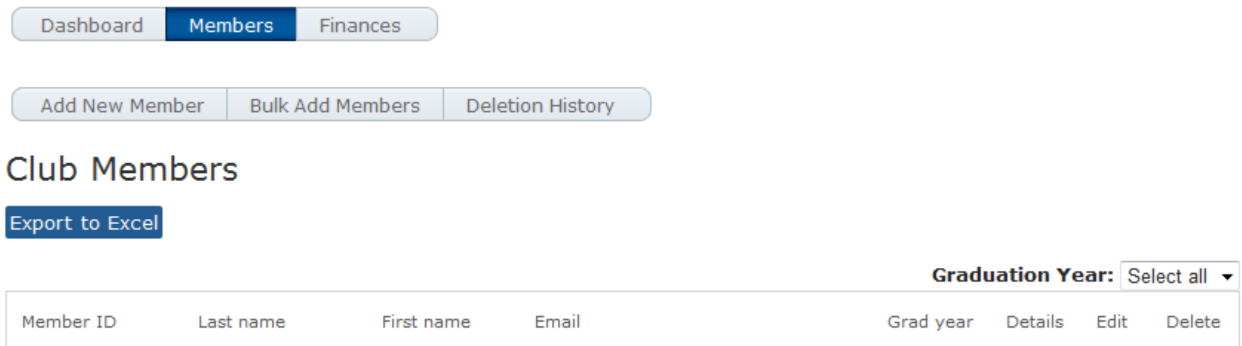
5 On the next page, you should see a list of all your members. You can sort through this list by graduation year or edit any member's existing information. You can also add members one by one via "Add New Member," add 10 members at once via "Bulk Add Members," or check deleted members within the past 30 days via "Deletion History."



6 Delete any members who are either no longer in the club. (This includes those that have graduated!) You may keep existing members and leave them in the roster.

7 Next, add in any and all new members that have joined the club.

8 IMPORTANT: ONLY add members if they have paid membership dues, because any member whose information is entered into the Membership Update Center may accidentally be included in the invoice generated at the end of this process, meaning you will have to pay for them even if they have not paid dues.

9 For each member, input as much information as you can. Information such as phone number and email is not necessary. The only item that will be used is the mailing address, in order to send Kiwanis newsletters to members.

10 Once you are finished inputting information for all members, an invoice should be generated. Click on "Finances" at the top of the page if you cannot see it.

11 Again, remember that District dues are $9 per member, and International dues are $300, $450, or $600, depending on your school. Be sure to check the math on the invoice to make sure you're paying the correct amount.

12 After checking the amount, you are free to pay via any of the methods, including credit card.

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13 Once you have paid your invoice, you are done! Generate a receipt and keep this for your records throughout this term.

14 IMPORTANT: You MUST print an invoice for your own records, because you will be asked to bring a copy of your invoice, proof of payment, and membership roster to Fall Training Conference as proof that all attendees from your club are dues-paid members.

15 As you can see, the Membership Update Center, assuming it is without glitches, is a fairly painless process. Be sure to read all instructions on the MUC when adding in your members and paying dues!

If you have any questions about the dues process, email the District Treasurer. Additionally, here is a video that can walk you through the steps of the MUC (although this is for Key Club International, the website and processes are still the same):

http://www.youtube.com/watch?v=0tfAvudii-w

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MEMBERSHIP DUES | UPDATING ADVISOR INFO

The two most frequently asked questions that Treasurers have are…

1. What if I never received my login email and password?
2. What if I never received membership materials for my club?

It may be the case that the new elected officers were not inputted into the Membership Update Center as designated officers. This is necessary as it allows officers to have access to the MUC and make necessary adjustments. If you are unable to gain access by speaking with your past board, contact the District Treasurer.

On the Membership Update Center, it asks for you to e-mail: memberservices@kiwanis.org for changes to advisor information. Optionally, you may also contact Kiwanis at 1-800-KIWANIS.

If you ever encounter trouble logging into the Membership Update Center and your advisor does not know the solution to the problem, email the District Treasurer at treasurer@cnhcirclek.org.

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MEMBERSHIP DUES | AUDITING ROSTERS

Before each District event such as Fall Training Conference and District Convention, the District Treasurer will audit a list of registered attendees from each school. Each member who attends FTC or DCON **MUST** be a paid member! There are three ways to ensure that all your attendees are paid for.

After logging onto the Membership Update Center, you can export a list of your members onto Excel for a printable copy of your roster. Remember, make sure you have paid your dues for all those members, as the District receives a list of them!

This is the roster that will be cross-checked with the members that registered for any district event *(except Crazy Kompetition for Infants)*. If the club has a member attending a District event NOT on this roster, the club Treasurer must provide proof that this member has been paid for (after paying dues) or the event attendee must pay club dues on the day of the event.

If there are any questions or complications, please contact the District Treasurer!

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MEMBERSHIP DUES | DEADLINE FOR AWARDS

When submitting District Awards at the end of each Circle K year, a dues report will be generated and sent to the Awards Chair & Advisor on **MARCH 1ST**. All awards placing clubs into a "category" based on membership will be judged from this dues report.

This means that all dues must be sent to Kiwanis International far before March 1st, so it has time to be processed in time for that final dues report to be generated. However, March 1st is NOT the last day you can submit dues. It is only the deadline for dues to be counted for club awards.

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TAX INFORMATION | 990-N TAX FORM

Ew, taxes. Fortunately, Circle K is not involved in PAYING taxes. As Treasurer, you are only responsible for protecting the tax-exempt status of your club through the 990-N form, which must be filled out on a yearly basis. Here is some basic information and some FAQs to help you train your successor on filling out the tax form next year!

Who needs to file?	Small, tax-exempt organizations earning $25,000 or less (all Circle K clubs); Circle K clubs whose funds are NOT held by the school (has off-campus account)
When is the form due?	Submit 5 months, 15 days after the end of your fiscal year (often May 15th)
Where is the form located?	https://sa.www4.irs.gov/epostcard/
Who has my login information?	Email the District Treasurer if your Employer Identification Number (EIN) and password were not given to you by the previous Treasurer.
How can I apply for an EIN?	If your club is new, and you require an Employer Identification Number (EIN), contact your Kiwanis advisor, who should assist you with this.
What mailing address do I use?	When the 990-N tax form prompts you to enter a mailing address, use the mailing address of your Kiwanis club.
What happens if I don't turn in the tax form?	If you fail to submit the 990-N form for three years, your club loses its tax-exempt status, and you will be kept from applying for another EIN for a period of time.

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BUDGETING | CLUB BUDGETS

One of the main jobs of the Treasurer is to create and manage a master budget for the year that will outline projected expenses. This budget will account for any events that may involve money, such as fundraisers, retreats, and dues. When outlining a master budget, it is better to underestimate the amount of money you will be raising and overestimate the amount of money being spent. If available, use the master budget from the previous year as guidance when developing the budget.

Here are some basic things you should consider including in your budget:

INTERNAL – all club income & expenses
EXTERNAL – all charitable and service-related funds

INTERNAL BUDGET	
INCOME	**EXPENSES**
Leftover funds from the previous year	District & International dues
Membership dues	New Member Install expenses
Kiwanis sponsorship	End of the Year Banquet expenses
New Member Installation	Conference reimbursements
End of the Year Banquet	Gas reimbursements
Fundraising events	T-Shirt costs
Donations & additional funding	Club cards and other marketing materials
T-Shirt sales	Officer expenses
Grants (i.e. Tomorrow Fund)	Family system expenses

EXTERNAL BUDGET	
INCOME	**EXPENSES**
Leftover funds from the previous year	Submitting DFI and other charity money
Fundraising events	
Donations & funding	
Happy/Sad Change	

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When managing your budget, it is critical for you to be as specific as possible when breaking down items beyond your basic headlines.

For example, when managing your fundraisers in your master budget, be sure to include the name of the event, the date it took place, and the net profit:

Date	Description	Net Profit
INTERNAL FUNDRAISERS		
04/15	Korean BBQ	$46.55
04/31	Swag Sales	$88.56
05/05	EOTY Banquet Penny Wars	$75.20
TOTAL RAISED		**$210.31**

It is important to distinguish your internal fundraisers from your external fundraisers, so use separate tables to stay organized!

Date	Description	Feeding America	PTP	KFH	Total funds raised
EXTERNAL FUNDRAISERS					
04/09	Happy/Sad Change	$17.30			$17.30
04/16	Concessions	$150	$150	$150	$450
05/07	Game Night		$350		$350
TOTAL RAISED					**$817.30**

Make sure you periodically update the budget. This will give you an idea of what the club is spending money on. It is a good idea to use Excel or Google Spreadsheets when creating a budget because you can use formulas to automatically add up the values. Just make sure that your Total Income stays higher than your Total Expenses. Keep backup files as well!

Also, provide regular updates to the rest of your board members about the budget, especially their officer budget, and notify them of any drastic cuts or boosts in funding that might require reallocation of funds.

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BUDGETING | OFFICER WISHLISTS

One important duty of a Treasurer is to ensure that each board member has a budget that can meet the needs of whatever he/she wishes to accomplish during that year. This helps each individual board member keep track of the amount of money they are able to spend throughout the year.

After creating an estimated budget for each board member using the current amount of funds that you have for your club, distribute a wish list to each individual. Have board members anticipate all the money they will need, divided by each event and based on past events. (If it's a new event, then try to estimate the costs.) Review each wish list and see if it fits into your overall budget!

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TREASURER TOOLS | BANK ACCOUNTS

There are two types of Circle K bank accounts: on-campus and off-campus. Which one is better, you ask? Here are some things to consider if your club does not already have an account established:

NOTE: You MUST be an officially chartered club to start a Circle K bank account. This includes having a sponsoring Kiwanis Club. You are NOT allowed to open a bank account under the name of Circle K without being an official club.

ON-CAMPUS VS. OFF-CAMPUS BANK ACCOUNTS	
On-Campus	Off-Campus
School files 990-N tax forms for the club each year	New Treasurer is responsible for filing the 990-N tax form each year
Deposit and withdrawal forms are typically required by the school	Deposit and withdrawal process is often quicker and simpler
Easier access, since the account is located on-campus	Might require greater transportation time to visit the bank

As you can see, there is not too much of a difference between on-campus and off-campus accounts. The main discrepancy is a safety issue. Because universities require more paperwork and justification to depositing and withdrawing funds, there is a lesser chance of embezzlement. The best type of account for each club is for the executive board to decide.

In the event that your Circle K bank account is off-campus, here are some tips to ensure the safety of club funds:

- Require all withdrawals to be approved by both the Treasurer and the President (or perhaps an advisor)
- Use a central mailing address such as your school mailing address (if your Center for Student Involvement provides that service) or Kiwanis Club mailing address
- Keep records public so financial information cannot be hidden
- Define embezzlement to eliminate ambiguity about what is allowed or not allowed
- Remove personal information from accounts to make sure you are not blamed for future incidents

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TREASURER TOOLS | MEMBERSHIP FORM

Why do we need a membership form?

The most important thing that membership forms accomplish is helping to create a club roster. Knowing your dues-paid members will make events for only dues-paid members much easier to organize. For example, when organizing events, already having contact information on record will save a lot of time. Also, having a record of what cities your members live in will help you efficiently organize rides as an officer.

What are some things that should be included on the form?

There are three basic kinds of information you need on your form: personal information, contact information, and emergency contact information. Personal information is name, birthdate for possible birthday wishes, and other goodies such as age. Contact information consists of e-mail address for club updates, phone number for immediate contact, and residence information to know where your members are located. Emergency contact info includes the name and contact information of someone in case something happens to the member during an event. A membership form can be very simple, but it can contain much more information that your officers may need.

Remember to be mindful that it takes time to fill it out. Be sure to ask for information on the form that you think would benefit your officers in their attempts to have an outstanding CKI year.

What should be turned in with the form and what incentives do members have to turn in their membership form?

Membership fees should be turned in along with the application, along with other things such as t-shirt money. It is crucial that the form and club dues are collected at the same time to ease future complications that may involve members saying that they remember paying but as an officer have no record of it. You may include incentives to this as well.

What are some other things that may be included on the membership form?

Release of Liability and a Picture Release form are also useful, especially if you plan to use photos of members for marketing purposes. If your club has a family system, you might encourage new members to apply to be a part of a family by attaching the application (if you have one) to the new member form. An explanation as to what being “dues paid” offers on the form is also important to show members why it is important to pay dues.

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TREASURER TOOLS | REIMBURSEMENTS

After creating a budget for your club, you need to find a way to track how your board members spend on behalf of the club and ensure that the correct amount of money is transferred from the club account to the buyer. Reimbursements can be very tricky. There are many factors to take into consideration, and reimbursements can easily become complicated. Not every school creates a special reimbursement policy, but this would be extremely helpful for board members and will help minimize any confusion that may occur.

Here are some factors to consider when deciding on how YOUR reimbursement system will work…

1. Remind board members to **KEEP ALL RECEIPTS!** This is the most important piece of magic that makes reimbursements work. Without receipts, you have no proof that any purchase was actually made.

2. For everything that does not require a receipt, such as gas mileage, start keeping track of which member drives to which event(s). Excel is SUPER useful for this!

3. When is the latest that a board member can request reimbursement? What if a board member gives a receipt to the next Treasurer, thinking he/she should still be reimbursed? Should this still be accepted?

4. What will be reimbursed? Ensure that board members do not use their budgets to purchase personal items. All items should directly benefit the club members in the name of service, leadership, and fellowship. Also, what types of events will mileage be reimbursed for?

5. For gas reimbursements, will you reimburse one-way or round-trip?

6. How will the reimbursement request be approved? Will this be decided only by the Treasurer or the rest of the executive board?

See sample reimbursement policy on page 50.

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TREASURER TOOLS | TREASURER FAQS

Specific questions involving dues processing can be answered more effectively through individual conferences, but for those miscellaneous concerns you might have from time to time, hopefully these FAQs will help you!

Q: I've never been Treasurer before. Where do I start?

A: There are a few main duties you should focus on. Once elected, start working with your executive board on the club budget, which will outline the income and expenses of your club throughout the year. As for dues, create an effective membership form and have members decide on how much dues will be. After collecting a good amount of dues, generate an invoice using the Membership Update Center.

Q: What is a typical amount that a club charges for dues?

A: There really is no "average" or "good" amount to charge for club dues. Clubs throughout CNH have charged anywhere from $10 to $60. See the manual article that lists different factors to consider when deciding dues.

Q: Do you recommend that the club t-shirt is included with the dues?

A: While it is not required to sell the club t-shirt while collecting dues, the shirt itself is a symbol of being a part of the club, and members officially become a part of the club when they pay dues. This also ensures that all members have a t-shirt by FTC and DCON. Also advertise all benefits of joining Circle K so members are aware that they are paying for more than a t-shirt. (:

Q: When is a good time to submit dues on the Membership Update Center?

A: Anytime between October 1st and November 30th and whenever the club has enough money to pay both the International and District fee for the amount of members specified in the dues structure. (Also keep in mind that all FTC attendees must be dues-paid.) Essentially, once it looks like most of your old and new members have paid their dues, start submitting them!

Q: If members have not been invoiced from the previous year, what do I do?

A: Perform an audit of your members (see the appropriate article) to check which members have not been invoiced. (The Membership Update Center will list all members that still need to be paid for.)

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Q: Our club does not have a fundraising chair. Do we need to have one?

A: You do not need to have a fundraising chair, but it is typically easier to delegate all such duties to another person if your club depends on fundraising. (It takes a LOT of work off the Treasurer.) However, if your club does not do much fundraising, it is probably not necessary.

Q: Where do I send registration money for District events?

A: See the CNH Circle K website for District event information. However, you will typically write a check made payable to "CNH Circle K" and send it to the Kiwanis District Office.

Q: Where can I find the Circle K insurance policy?

A: [Information provided by Past District Administrator Camille Goulet.]
The insurance is primarily focused at providing you with a defense for third party claims. In plain English, it's designed to protect you if someone else sues you for something that happened while you were at a Circle K event. It has a VERY small medical expense component if you are injured and have no other insurance. Like all insurance policies, not all activities are covered. For example, athletic competitions are excluded, which is why it's essential that you have waivers from every individual for such an event. Although we can readily provide a Certificate of Insurance to show Circle K is insured, you should not agree to a third party being an "additional insured," which has a particular meaning. If you need assistance obtaining insurance information from Kiwanis International, you should go through your sponsoring Kiwanis club.

Q: I would like to plan a fundraiser, but an organization I'm working with requires that I provide a Tax ID number. Where can I get one of these?

A: Talk to your Kiwanis club first, then forward any concerns to the District Treasurer.

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HANDLING MONEY | FUNDRAISER BUDGETS

To ensure that each fundraiser you plan is a success, it is a good idea to keep track of everything you plan to spend money on and all the ways you plan to earn money. Similar to the Club Budgets article on page 16, keep separate columns for your revenue and expenditure. For each item, include the following:

- Description of the item
- Unit price and quantity
- Estimated and actual income and expenditures
- Any notes for the next person who reads the budget and wants to hold the same fundraiser (i.e. notes on the item and the event itself)
- Name of vendor for reference, if applicable (i.e. DJ, casino company, catering)
- Whether or not these items can be donated

Microsoft Excel is extremely useful for budgets because it essentially totals your revenues and allows you to decide whether or not that fundraiser is worth holding.

For a sample fundraiser budget, see page 54.

If you are looking for more one-on-one help in creating a budget, contact the District Treasurer to set up a conference!

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HANDLING MONEY | SENDING REVENUE

So you just had a fundraiser. How do you get the money from your club to any of the District Fundraising Initiatives? (The 2018-19 DFIs are the Pediatric Trauma Program, Kiwanis Family House, and Feeding America.) Have the Treasurer collect all the proceeds and send them in the form of a club check (payable to **CNH CIRCLE K**) to:

CNH Kiwanis District Office
Attn: Bruce Hennings
8360 Red Oak Street, Suite 201
Rancho Cucamonga, CA 91730

Fundraising recognition at FTC and DCON will be presented based on the amount of money that is sent in ON-TIME to Bruce Hennings or recorded in your MRF. (Checks turned in to the District Treasurer at FTC and DCON will be considered ON-TIME, as long as they are submitted before the Saturday night of the event.)

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HANDLING MONEY | CREDIT CARDS

Credit cards. Now THAT'S an idea! What if you held a fundraising event, but customers said they didn't have cash on them? Now you can ask them if they would like to use their credit card!

Introducing…**SQUARE!**

https://squareup.com

Square Card Readers are sent for FREE, and they are compatible with iPhone, iPod, and Android! Check out the website for details, but this may be something to consider when you do not want to handle cash at an event!

HOWEVER, Square takes 2.75% from each purchase, so make sure to weigh convenience over revenue. Whether or not you use credit card, invest in a receipt book (can be bought at any office supplies store) so each customer receives proof of purchase.

If you have any questions about how this works, check out the following website: https://help.squareup.com/

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HANDLING MONEY | MOBILE TRANSFER

So what if you are holding a fundraising event, selling club T-shirts, or giving out membership applications and the members or participants do not have their credit card/debit card… and you do not have your Square?

Introducing…

VENMO!

Venmo is a simple to use application for smartphones that allows you to connect your bank account and transfer money between accounts. It is a simple, convenient way to pay someone when you don't happen to have money at hand.

The benefits of Venmo are that you can easily connect your off-campus club bank account to your phone and easily get members to pay you for things such as t-shirts, dues, fundraisers, registration fees, etc.

However, it may not be as easy when holding fundraisers for the public or on your campus where people you may not know wish to pay digitally. Also, there is a 3% charge when using credit cards.

Check it out yourself to see if it is a convenient option for you club: https://venmo.com/

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TACKLING LOGISTICS | EVENT PLANNING BASICS

WHAT

What is a fundraiser? A fundraiser is an event to help raise money towards any cause, whether charity or your own club. Brainstorming ideas can lead to a great idea. A fundraiser can be a carwash, eat-for-service at a local restaurant, lemonade stand, and many others. CREATIVITY is key!

WHO

Determine the audience you want to cater to. If the money goes toward your club, you cannot solicit money from the community. If the money goes toward charity, then you can direct the fundraiser to people outside of Circle K.

Determine the size of the event. The bigger the event, the more people that will be needed to help out. Even with small events, having more people than needed is always better than having less. If it's an all-day fundraiser, be sure to create different shifts. You may even set the shift to slightly overlap each other to make sure there is at least 1 person present.

WHERE

One of the bigger problems for off-campus fundraisers is the location. Location is very important when it comes to planning because you want to select a place that will attract as many people as possible. For example, if your club were to do a fundraiser for Yogurtland, it may be better to contact a Yogurtland at a mall rather than one in a suburb.

WHEN

Timing is also an important part when planning an event. You want to avoid other major events/dates and find a time that is both appropriate and efficient for the members. As an example, an ice cream fundraiser on a hot summer weekend is a lot better than one in the winter on a school night. Another part of timing is to make sure you have enough time to advertise your event and recruit members for help.

WHY

Be prepared to answer customers' questions such as why you are hosting the event, what or who the event is for, and how the funds are benefitting the community. Fundraising for a charity makes it easier for people to donate. If your fundraiser benefits administrative funds, be prepared to explain to donors what you plan to do with money and how the money is helpful.

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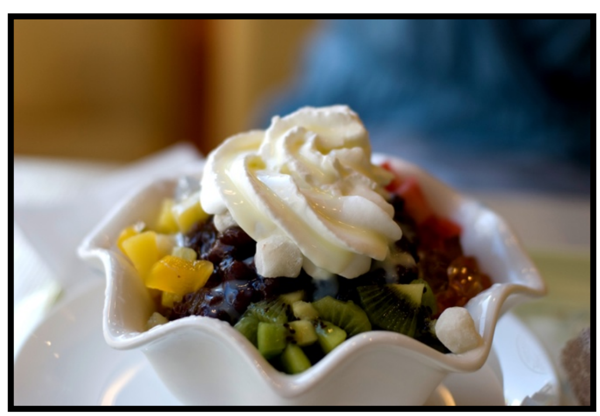
TACKLING LOGISTICS | FUNDRAISING CHECKLIST

PLANNING

- What type of fundraiser are we doing?
- What are we selling?
- Who are we selling to?
- Where are we doing it?
    - Is the location available on the date of the event?
    - Is a deposit necessary?
    - Are there any other location fees to be aware of/rental fees?
    - Permits or insurance required?
- When are we doing it?
- How many are helping out?
- How many do we need to or want to help out?
- What is the purpose of the event? (i.e. Where is the money going?)
- Is it appropriate or desirable to include the Kiwanis Family in planning/attending?
- Record all contact information!

BEFOREHAND

- Make a budget for your event (projected expenses and income)
    - What is our breakeven point?
    - What safety nets do we have?
    - How will money and items worth money be accounted for in advance of the event? At the event? After the event?
    - What non-personal account will be used to process income and expenses?
- Consider registration process if applicable
    - Advance registration vs. at the door registration?
    - Will there be difference in price between these two?
- Advertisement: (Facebook, flyers, word of mouth)
    - What audience are you promoting to? (i.e. club members, campus, community, other Circle K clubs, Kiwanis Family)
    - How much will it cost prior to the event, and where?



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- How much will it cost after the event, and where?
- If the event can be open to the district, make sure to put in an Event Request Form
- Sponsorship (i.e. donation of prizes from local company)
- Check to see if there are any equipment or supplies required
- Detailed plan of all the shifts if it's a big event.
- Does this event require security or other regulations?

DAY BEFORE EVENT

- Confirm with all the volunteers
- Specific details: Dress code, tasks for volunteer, etc.
- Make sure all equipment is ready for use
- Have all directional signage ready
- Who will take pictures and otherwise document the event?

DAY OF EVENT

- Pick up any last minute supplies
- Set up EARLY!
- Keep record of all sales
- Clean up (don't leave a mess! leave the area cleaner than before you arrived)

AFTER EVENT

- Return any equipment that you borrowed/unused.
- Fill out CERF for event
- Get receipt and reimburse for supplies
- Update the budget
- Cost/benefit analysis (should we do this event again?)
- Thank all volunteers and participants! ☺

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TACKLING LOGISTICS | LARGE SCALE FUNDRAISERS

This is an example planning guide for organizing a large scale fundraiser. The example is from UC Berkeley's Charity Showcase. The purpose of this guide is to help fundraising chairs get in the mindset of not only planning a large-scale fundraiser, but also any other project. I hope this will serve as a reference to you as to how to go about approaching a large-scale project. Points to emphasize are:

1. Start planning early—months before your event!
2. Delegate! Because you don't have to do everything yourself, your committee is there for you! (Also consider having subcommittees.)
3. HAVE FUN!

Good luck on your projects!

<u>Large Scale Fundraiser Planning Guide</u>

Event: Charity Showcase

This is a pretty big event where you ask different performing clubs to come out. We also ask our members be MCs to announce each performer. Pretty straightforward: we get food, performers, location, publicize and sell tickets!

<u>To Do List</u>

When you have been appointed and are planning your term

- Meet with the predecessor to get advice.
- Create an excel sheet for planning hours. Keep track of everyone who helps.
- Create a projected budget sheet. Approximate all the funding you expect to get and expenses and profits that you plan to make. For Charity Showcase, expenses include food and decorations. Profits are from ticket sales.

September

- Decide how many people you want to have at Charity Showcase and look for a room to hold the performance.
- Decide on what entertainment to have. Have a subcommittee to ask on campus performing groups to come!
- Send out donation letters and fill out donation application online. Ask your committee members to help ask! This event will need monetary and food donations.

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- Ask your committee to get ideas on and delegate tasks for themes, decoration, flyers, etc. Use Google docs to share ideas. Use doodle.com to see when people in your committee are available to have meetings if you are planning during break.

October

- Ask for food donations from local grocers and restaurants.
- Consider appointing sub-chairs. This not only delegate tasks but it helps get the members more involved. Sub-chairs can be in charge of decorations, donations, publicity and food. For publicity, invite Circle K's from other schools too!

November

- Have workdays to make decorations
- Start a Facebook event before the event. This not only gets the word out fast but it gives you an estimation of how many people to expect.
- Make reservations for the place you plan to table.
- Put up fliers around campus 2 weeks before Charity Showcase
- Start tabling and ticket sales on week before event.
- Day(s) before the event
    - Set up a mandatory volunteer meeting to go over event details and individual volunteer duties.
    - Buy all supplies. Gather supplies in one of a few locations.
    - Follow up on room reservation
- Day of Charity Showcase
    - Afternoon: Have sub-chair pick up food
    - Make sure to bring cash box
    - Arrive at the room 3 hours before to set up event. Make sure all sub-chairs and volunteers arrive to set up as well.
- After Charity Showcase
    - Collect all planning hours and receipts, and CERF the event.
    - Return borrowed or unused supplies.
    - Show your appreciation to those who have helped you.
    - Organize all your Charity Showcase material for the next Fundraising chair.

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TACKLING LOGISTICS | SMALL SCALE FUNDRAISERS

Small Event Example: "Food or Drink Sale"

1. Start with an idea.

Small-scale fundraisers usually work best when you attract customers, and one easy way is through food! One common idea is to have a food sale in conjunction with tabling or flyering, especially during summer or the start of the school year. Consider the following when creating your idea:

<u>WHO are you targeting?</u>
If you hold food sales on your school campus, then remember your primary targets are all college students who are always on the go! Have plates for foods like tacos or wraps for foods like spam musubi. Offer a cap for the cup if you sell drinks. That way, students can save the meal if they are on their way to class.

<u>WHAT are you offering?</u>
For college students, on-campus foods can be quite expensive or common, so take advantage by selling cheap, unavailable foods! Spam musubi and freshly-made lemonade, for example, can be bought cheap and sold at a low and appealing cost. You can even sell both or make a bundle deal, such as the price of 4 spam musubi for 6! College students love deals!

<u>WHEN and WHERE is your event?</u>
Look for places where traffic is greatest. Take advantage of every situation: sell lemonade during the spring/summer, or sell something hot during the winter. Sell in a visible and at a popular location and time. And always remember to follow your school rules about food sales so you don't run into any health regulation problems!

2. Create a budget.

Start your planning with realistic, yet high goals. Aim for profits $10-$20 higher than the last food sale, for example. Avoid net cost by asking club members for supplies! Many will be happy to donate items such as cups or napkins. Buy things from a cheap store instead of the campus store. Purchase in bulk for future event investments. There are many ways to save money, so research and look for them!

3. Delegate tasks.

Don't try to stay for a food sale for 7 hours by yourself and end up skipping classes; there's no way you will handle EVERYTHING by yourself. Create working shifts with your club to split the time. Remember to have help in setting up, managing the cash, selling, publicizing, and cleaning up!

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4. Publicize, publicize, PUBLICIZE!

The MOST IMPORTANT POINT of a food sale is to grab attention. Create flyers or spread the word a week early in advance. Create sign-up sheets or forms to contact people on the day of the sale as a reminder. Designing a bright and attractive poster for your table/booth will help as well! Use any and every resource you can to get as many people to go to your fundraiser!

Reminders:

- Keep all receipts so that your club can reimburse you. Don't use your own money; college is expensive enough as it is!
- Work with your club and committee—no one has to do the job alone, and even small events are no exception!

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FUNDRAISING TOOLS | DFI EDUCATION

Each year, the CNH District endorses a minimum of three District Fundraising Initiatives (DFIs) in order to focus our fundraising efforts across the district. Although it is important to raise funds for administrative purposes, it is a great idea to focus on the DFIs as each charity has a purpose and an impact on the world. The most important aspect of DFI fundraising is **education**. Without education, there is no cause, and without a cause, there is no charity. Not only should YOU be educated about the DFIs, but also your fellow club members, as well as the general public.

Questions:

1. How do I get started?
2. What is the purpose of educating members of the DFIs?
3. Where am I supposed to get resources for educating my members?

All these are questions that could be asked when starting with DFI education. Do not panic! Every question will be answered!

Purpose:

The goal of educating your members on the DFIs is to know what the club is fundraising for. During a fundraiser, you do not want someone to say, "I don't know," when approached with why they are fundraising. Plus, wouldn't knowing what you are fundraising for motivate you to work harder? By spreading awareness about our district's DFIs, more people will want to support Kiwanis, and help reach our goals.

Getting Started:

- **Educate YOURSELF on the DFIs.**
  - Not knowing about the DFIs yourself is a problem as you are the number one resource for information on the District Fundraising Initiatives.
  - Obtain information via Google, Youtube, Circle K International, from fellow Treasurers, District FiFun Liaisons, Lieutenant Governors, etc. You have an abundant amount of resources!
- **Have a game plan.**
  - Know which week(s) you want to educate your members on the DFIs, as well as recognize what you want to educate members about.
    - Ex.: Participating in the DFI Weeks during the school year. Always talk to your board about what you want to do. Remember that they are there for you and want you to succeed!

Methods of DFI Education:

1. Host a Workshop/Presentation

a. **Pros:** Easy to emphasize, very effective in terms of education, better to have opportunities to learn rather than none.

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b. **Cons:** Will not be appealing to new members, could be uninteresting, requires a lot of planning with little results.

Solution: Create a fun and exciting workshop! You are not just limited to reading off a power point. Offer incentives to have members come out such as a competition or a prize!

c. **Important Things to Note:** If you need help thinking of what to put in your presentation, keep it simple! You could focus on one specific DFI, or you could give a general overview of each DFI. Remember that you can be flexible in whatever you choose to do! Also, be sure to contact your FiFun Liaisons (*contact info on page 65*)!

2. **Provide Information with your Fundraiser.**

a. Whenever you are having a fundraiser, remember who you are targeting: either CKI members, or the public. Sometimes it's a great idea to provide information about the DFIs in conjunction with your fundraiser! Whether it's attaching a small sticker with the Milk Tea you are selling, or passing out pamphlets during your benefit concert, the possibilities are endless!

b. Pros: Easy to advertise, many creative ways to provide **information.**

c. Cons: Requires excess work besides already planning for a fundraiser, could be ignored, not as effective.

3. **Work with your Board.**

a. Although Treasurers and Fundraising Chairs are different from the other leadership positions, working with other positions can boost your success. For example, by working with your Publicity Chair, you will be able to effectively spread the awareness of your fundraiser, and even the DFIs.

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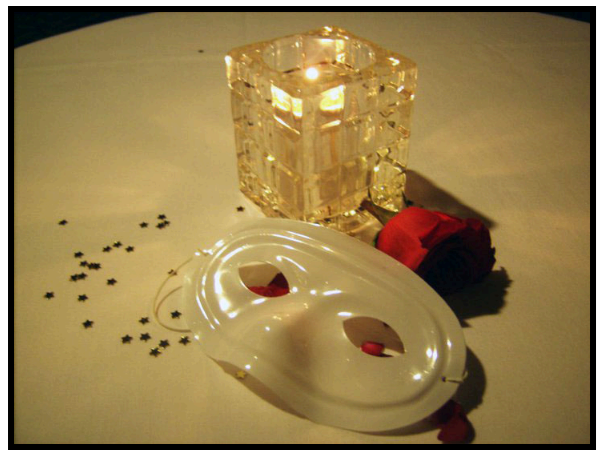
FUNDRAISING TOOLS | FUNDRAISING IDEAS

Successful fundraisers are all about CREATIVITY! This is a short list of simple fundraising ideas, but the real money-making is when you add your own twist to attract customers!

Auctions – From date auctions to service auctions, have people bid on (appropriate) services like baking, dinner, cleaning, and much more!

Charity Dance – The best part about a charity dance is having a theme! There are so many activities you can have at a charity dance, from a raffle and karaoke to casino tables and the actual dance!



Concert/Band – Invite performers from the community, YouTube, and elsewhere to sing or play instruments on stage!

Craft Sales – Host workdays where members can make some sort of craft keepsake (like bracelets) to sell.

Eat-For-Service – Contact a local restaurant or fast food place (i.e. Chili's or Jamba Juice) to see if they will allow your club to host a night where customers can present a flyer and the food place will donate a percentage of purchases to your club!

Food Fundraisers – You can sell ANYTHING! Root beer floats, spam musubi, Korean BBQ, popsicles, fried chicken, baked goods, strawberry lemonade…the possibilities are endless!

Holiday Sales – Sell candy grams! Chocolate roses for Valentine's Day (or condom roses for AIDS awareness), snow globes for winter, murder mystery for Halloween, etc.

Kiwanis Takeover – Often times, Kiwanis clubs will allow the Circle K club(s) they sponsor to host one of their meetings per year, and your club receives all the funds raised from that meeting!

Movie Nights – Have people pay to watch a movie (charge for concessions) or maybe charge them to get out (i.e. Horrible Movie Night or Horror Film Night).

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Tournaments – Everyone likes to compete and win prizes! Examples include singing tournaments, dance tournaments, video game tournaments, etc.

Yard Sale – Great way to get rid of miscellaneous items! Talk to Kiwanians about donating items sitting in their garages as well!

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FUNDRAISING TOOLS | FUNDRAISING FAQS

You may have questions that cannot be answered by the content in this manual, but as with any classroom setting, there are probably others who have the same questions. Here are some common ones you might encounter during your term:

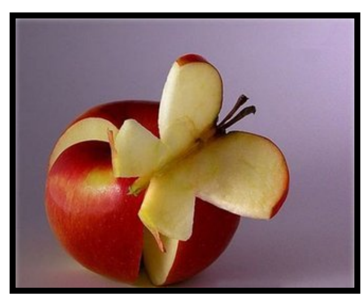
Q: I have never hosted a fundraiser before. Where do I start in my duties as fundraising chair?

A: Make a game plan for the year. Create a list of all the fundraisers you want to host throughout the year (because you are limited by time!) and work with your board to put together a calendar of when you would ideally like to hold each of those fundraisers. From there, start working on event outlines for your upcoming fundraisers, making a list of everything that needs to be done. If you need additional help, think about starting a fundraising committee if you don't already have one!

Q: I attend a commuter school. No one stays on-campus outside of class, so fundraisers involving selling items on-campus is especially difficult. What types of fundraisers would be successful in this situation?

A: Though large-scale fundraisers require more work than a simple food fundraiser or eat-for-service, they can be more rewarding in the long run, especially for commuter schools. Holding events that span over several hours will make the LONG drive to the event worth it. Examples include game or sports tournaments, any overnight event, and events with many activities to do (DJ, casino games, raffle, etc.).

Q: I'm not creative at ALL. How can I come up with good fundraising ideas?



A: The key to creative fundraisers is taking something ordinary and putting a twist on it! For example, when selling food, make the food wacky (but tasty) looking, and advertise the food sales by distributing DFI information with it. (Remember to always advertise your cause!) Hold brainstorming sessions with your fundraising committee or club board. Provide a topic such as "ice" or "cars" and give the group 10 minutes to think of a fundraiser relating to that topic. If you're completely out of ideas, talk to other fundraising chairs in the district or set up a conference with the District Treasurer!

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Q: How early should I start planning an event?

A: As early as possible! With time, you are able to proceed with event planning at a slow and detailed pace. Much like studying habits, do a little bit every day, and it accumulates into a wonderfully detailed project in the end!

Q: I would like to plan a fundraiser, but an organization I'm working with requires that I provide a Tax ID number. Where can I get one of those?

A: Talk to your Kiwanis club first, then forward any concerns to the District Treasurer.

Q: Can I fundraise for other causes that are not DFIs?

A: **YES!** Although meeting fundraising goals for DFIs are important, clubs can fundraise for their own causes as well.

Q: Do we receive awards for raising money for District Fundraising Initiatives? What about for charities that are not DFIs?

A: At FTC and DCON, there will be opportunities for clubs to be recognized for all charitable fundraising efforts. This includes donations to charities that are not part of our District Fundraising Initiatives!

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FUNDRAISING TOOLS | REQUESTING DONATIONS

THE BASICS

WHO: The three big WHOS are (1) Who are these donations for? (2) Who will the donations be from? (3) Most importantly, who will you help you ask for these donations?

Make sure to keep track of who you are asking for donations. The easiest way to do this is to create a spreadsheet with…

- Company name (and department, if applicable)
- Store or mailing address (including directions, if you are driving there)
- Contact name and phone number & email address (can be filled in after speaking with the store manager)
- Date requesting donation
- Method of donation request (i.e. mail, online, walk-in)
- Donations requested (know exactly what you want the company to give you!)
- $$ value of donation (to be filled in after donation is received)
- Status of donation (whether or not a donation was given)
- Additional notes (i.e. deadlines, website URL)

WHAT: This is the main course that you serve when soliciting donations from others. It's like the cream of the crop, the Chuck Norris to your average human, the Omnimon to your Digimon. Basically, it's what runs through a person's mind when they think, "What am I donating to?" This can be as simple as describing the cause of your event, whether you are raising money for charity or for administrative purposes. (Which do you think will be more likely to receive a donation?)

WHEN / WHERE: When and where is your event happening? Consider asking for donations locally. Make sure you check with multiple companies to know how far in advance you must request donations.

HOW: How you can ask is limitless and is only bounded by one's imagination. Just a few examples would include: face to face interaction, hosting special events, writing personal letters, making phone calls, sending mail, utilizing media advertising, etc.

These links can also show you possible ways to solicit donations:
http://www.thefundraisingauthority.com/fundraising-basics/how-to-ask/
http://www.wsj.com/articles/SB10001424052970204394804577007843506174390

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To formulate a game plan for requesting donations in-person, ensure that you have drivers, divide your crew into smaller groups, and assign a set of stores to each group. Pair up experienced members with less-experienced ones. Make sure each group has what they will need to ask for donations (i.e. donation letter, map, your cell phone number, etc.).

Make sure to outline donations letters before you dive into writing them, just like any other piece of writing! Here are some things you should include:

- Date of request
- Address of company
- Self-introduction (who are you?)
- What is Circle K International? (include statistics and examples of service projects)
- What event do you need donations for?
- Description of event (i.e. date, charity, general information)
- Charity purpose (if applicable)
- What donations do you need?
- What will the donations be used for?
- How will the company be recognized? (i.e. inclusion in marketing/publicity, poster)
- Where should donations be sent? (i.e. address)
- Deadline for donations
- Mention that Circle K is a non-profit organization
- Contact information
- **THANK YOU!**

Though this may be a LOT of information, try to condense the donation letter into one typed page on official Circle K letterhead, found on the CNH Web site.

See a sample donation letter on page 55.

The following is a guide on how to approach a store in-person. Keep in mind that each individual has his/her own style of inquiry, so vary those to make the most effective impact.

1) Ask to speak to the manager.
2) Introduce yourself (and whoever else you are with).
3) Summarize what Circle K is.
4) Summarize the event (and the non-profit charity, if applicable).
5) Tell the manager what kind of donations are needed. (BE SPECIFIC!)
6) How will you compensate for the donation (or recognize the company)?
7) Thank the manager, no matter how he/she responds.
8) Leave your contact information.

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Note: Keep in mind that some stores will automatically refer you to corporate, meaning chain stores like Target, Costco, and Raley's/Ralph's will ask you to contact their national or international branch and forward your request to them, instead of asking locally. Save time by knowing which stores require inquiries at the corporate level. If unsure, call ahead of time. Corporate requests should be sent 3-4 months before the event you need donations for. Do not wait until two weeks before an event to ask for donations, then find out that inquiries must be made at the corporate level. Mark this detail on your spreadsheet initially to keep track of the timing of all donation requests.

Update the spreadsheet you made previously as you ask for donations. Also, if the committee or organization keeps a record of hours and mileage, be sure to document those as well.

For walk-in requests, store managers may immediately hand you a donation. Other times, they will ask you to call back or, if you request early enough, they may ask you to contact them at a later date. Keep track of which stores you need to follow-up with and what date you will need to call them. (Don't forget to get their name and contact information!) For mailed requests, if no response is received in 3-4 weeks, consider calling the location you asked. (Mail can get "lost" sometimes.) If definite answers are difficult to extract from managers, ask for recommendations of other places you should check for the particular donated item you are seeking.

Most importantly, show appreciation for donors. **ALWAYS** send thank you cards to companies that donate. Distribute these after the event. Include how much money was raised (for a fundraiser) or generally how successful the event was. If possible, include pictures of the event. Genuinely appreciate all your donors, as this will encourage them to continue donating to your cause in future years.

WHY: The why is self-explanatory and all depends on you; the only way a donation will happen is because you feel that this donation is worthy of your time and you convince others that your cause is worthy of their donation. This resolve constitutes not only your willingness to even begin asking for donations but also continues to fuel your drive and attracts others as the "asking for donations" continues.

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HELPFUL HINTS

- Always work in groups.
- Dress in appropriate attire, use appropriate language, and thoroughly detail your cause.
- Ask for donations ANYWHERE AND EVERYWHERE. Here is just a small list of possible places you can ask for a donation:
  - Grocery and shopping stores
  - Banks
  - Local businesses
  - Fast food locations
  - Movie theaters
- Google "donation requests" of local chain stores in your area (or ones that you know), and that will often times take you to a webpage giving you more information about how those stores handle donation requests
- Probably the most important note of all: NEVER STRESS ABOUT DONATIONS YOU DON'T GET. The reason they call this a donation is because it not only because it helps those less fortunate but also because it reflects the willingness of others to give during a certain time, so don't be disheartened if you don't receive too many donations; it could really just depend on the external circumstances (like the economy) which you can account for next time.

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FUNDRAISING TOOLS | SHOWING APPRECIATION

WHY IS APPRECIATION IMPORTANT?

Appreciation is a form of recognition to others, encouraging them to continue doing whatever it is you are thanking them for. It shows that an individual was a valuable part of your mission or project (or life in general) and that you care about how he or she helped you. (One of the best parts of appreciation is inspiring others to pay it forward.)

WHO SHOULD WE APPRECIATE?

♥ Family
♥ Friends
♥ Volunteers (general members)
♥ Volunteer Coordinators
♥ Board Members
♥ Kiwanians
♥ Advisors
♥ Co-Workers
♥ Organizations
♥ Vendors
♥ Professors
♥ **EVERYONE!**

ARE THERE DIFFERENT WAYS OF SHOWING APPRECIATION?

How you show appreciation should depend on if the is a professional acquaintance or entity or a personal one.

Above all else, company sponsors like to see the impact their contribution has made. When showing appreciation for them, you should generally provide the following:

♥ Handwritten Thank-You Letter
♥ Photo or Gift illustrating the benefits of their contribution.
♥ Invitation to the event they contributed to if applicable.
♥ Certificates of appreciation.

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Handwritten letters are a general rule and should always be provided. The rest are just additional ways you can further show your appreciation.

For personal contacts, however, using your creativity when showing appreciation can go a long way. Most people have little use for a thank-you letter, but if you spend the effort to give them a neat or memorable token of appreciation, they would be further inclined to help you. Handmade cards or gifts, t-shirts, or even a verbal announcement are just some ways you can show your appreciation. Always remember that any form of appreciation is better than none. No matter how you decide to show appreciation, always be sure to reference what the recognition was for, so the individual will know why they got the recognition, encourage them to participate again, and hopefully encourage others to help in the future.

<u>OTHER IDEAS FOR APPRECIATION</u>

♥ Flowers (or other plant)
♥ Post-it Note
♥ Thank You Card
♥ Wrapped Candy Bar
♥ Verbal Recognition
♥ Newsletter Shout-outs
♥ Hugs & Kisses!
♥ Gift Basket
♥ Video or Movie
♥ Member of the Month
♥ Lunch Date
♥ Photo Frame
♥ Holiday Gram
♥ Baked Goods
♥ Home-cooked Food
♥ Gift Card
♥ Appreciation Dinner
♥ Plaque or Medal
♥ Buy-a-Brick (Engraving)
♥ Name Event or Award
♥ Scrapbook

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FUNDRAISING TOOLS | CHAIRING A COMMITTEE

YOU ARE NOT ALONE…when it comes to planning fundraisers! Many schools have a Fundraising Committee, and if you don't have a fundraising chair or committee, it is quite easy to start one! Here are some tips on how to start and/or maintain a committee…

1. Choose committee members! Committees are either "open" or "closed." Members must apply to be on a closed committee, such as the District Convention committee. Members can freely join open committees. You just advertise the date and location, and whoever shows up will comprise your committee!

2. Keep a roster! Remember that being on a committee counts towards the Member Recognition Program (MRP) so keep a roster of who attends your committee meetings.

3. Set goals! Brainstorm all the fundraisers you want to hold this year and create a calendar containing all the fundraiser dates you ideally want. This will help you plan out what to discuss at committee meetings as the term progresses.

4. Hold meetings! Feel free to use the guide in the next section on how to run successful committee meetings.

5. Delegate and achieve! Your committee wants to help you achieve your goals, so make them a part of the planning process. Give them tasks such as creating flyers or coordinating volunteers. Eventually, encourage members to even chair their own fundraiser!

6. Train potential successors! Your job is not only to hold fundraisers but also to pass on your event planning knowledge to those on your committee. After all, it's a great feeling to see the fundraising committee succeed in the next year because of what you taught them!

7. Show appreciation! Members are not forced to join your committee. They join because they want to. Remember to constantly show appreciation for them, whether you bring snacks to in-person meetings or distribute thank you cards at the end of the Circle K year.

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Holding committee meetings is its own art. From in-person to online, there are tons of ways to interact with your committee members and keep them involved. Read below for tips on how to stay organized with committee meetings!

How will you be holding meetings?

In-person or online? If you hold in-person meetings, make sure to designate a location AHEAD of time (make on-campus reservations if necessary) and advertise both the location and date to your club members via Facebook, emails, general meeting announcements, and word of mouth.

When school is not in session and you would still like to hold meetings online, choose an online program that members can download and chat in the same room. Some of these programs include:

- AIM (only chat, no video) - http://www.aim.com
- Skype (chat, no group video) - http://www.skype.com
- Tinychat (limited chat, group video) - http://tinychat.com
- Meebo - http://www.meebo.com/
- Google+ - https://plus.google.com
- Free Conference (phone) - http://www.freeconference.com
- Google Hangouts (limit of 10 people) - https://hangouts.google.com/
- Google Meet (several schools receive full access) - https://meet.google.com/
- Zoom (several schools receive full access) - https://zoom.us/
- Just Google for more options!

Online Meeting Tips

To ensure top quality when you are NOT meeting in person, make sure all your committee members wear headphones and mute their microphone whenever they are not speaking to eliminate unnecessary background noise. Encourage them to chat in a quiet environment (no common rooms or public areas), and be sure to find somewhere that has a decent internet connection to minimize lag as you run the meeting.

Basic Etiquette

Stay professional and friendly, but always be yourself! Meeting are about efficiency and bonding. While you want to complete all the business listed on your agenda, don't worry if you can't get through everything. Politely ask side conversations to be saved until after the meeting but also don't be afraid to have a light sense of humor and let members joke once in

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a while. Remember that THEY are giving up their time to attend your committee meeting, so make it worth their time but also remember that they must respect you too!

Being a Leader

Remain open-minded. The benefit of having a committee is to gather many different opinions for YOU as the event planner to make executive decisions. While members may dislike times when their ideas are not accepted, remember that you must do what is best for the event you are planning and the cause you are raising funds for. Always acknowledge the opinions of ALL your members, whether or not you agree with them.

Meeting Content

- Don't "wing" any committee meetings. Have specific goals and create an agenda for each meeting so members know you accomplished something by the end. Otherwise, what is the point of meeting?
- Avoid "open forum" discussions and try to ask guided questions instead. Brainstorming sessions can often lead to awkward silences, or they can serve as a chance for your committee members to speak up! Have backup suggestions of your own to avoid any awkward moments.
- Always ask committee members to present their ideas before saying your own. This way, members will not be tempted to agree with whatever you say.

Pre-Meeting

Send out the agenda before the meeting so everyone knows what will be discussed. This is a great way to ask members to have ideas ready on certain topics before coming to the meeting. Also, remind members about etiquette and set rules regarding things such as leaving early!

Regulating Meetings

Kindly restrict side conversations and limit tangents. Stick to your agenda, and if one member starts talking about something else, inform him/her that you will discuss this later or add it to your agenda for next time. Also, stimulate discussion! Encourage quieter members to share their opinions and don't let a few individuals overpower the discussions.

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Taking Minutes

Take minutes yourself, have your Executive Assistant take minutes, have your committee members take turns taking minutes, or take minutes later. To record minutes quicker, have a “fill-in-the-blank” agenda prepared beforehand. Outline all the topics you would like to discuss and all the questions you want to have answered throughout the meeting. Include reminders to yourself, so you don't have to go back and forth between subjects. See example below.

MASQUERADE BALL COMMITTEE MEETING
[Friday, July 2nd, 2010 @ 9:00 PM]

Meeting Start Time:
Attendees:

VOTING ON A DJ
- How are we going to vote?
- Information to include on the ballot:
- DEADLINE = ??

EVENT TAGLINE
- Top three choices:
  1.
  2.
  3.
- How are we going to vote?
- DEADLINE = ??

CASINO TABLES
The Dilemma: Should we use the same company?

PROS	CONS

The Decision: ??

PHOTOGRAPHY
- Options (companies/individuals)
  1.
  2.

DECORATIONS
List all ideas :]
Theme colors: crimson, black, gold, white

Meeting End Time:

If your co-chair takes minutes, make sure to coordinate with him/her beforehand so you are both on the same page during the meeting. You may ask a committee member to take minutes, but this might distract him/her from participating in discussion. Lastly, if your committee meeting is purely through online chat, you can focus on your meeting and go through the chat later, summarizing and taking minutes as you read through the chat.

See a sample meeting agenda and set of minutes on pages 62 - 64.

Post-Meeting

Send detailed minutes, especially to those members who could not make the meeting. Make the minutes fun but easy to read (using different fonts and colors). Finish unfinished discussions! If something during the committee meeting takes too long to decide, resume discussion via email thread or at a future meeting. Delegate tasks! Send an email assigning each committee member to complete a certain task that will help the planning of fundraisers. This will keep them active and involved in the committee. Lastly, thank everyone! Appreciate your committee because they took time out of their schedule to support you!

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APPENDIX | SAMPLE REIMBURSEMENT POLICY

CIRCLE K INTERNATIONAL
UNIVERSITY OF CALIFORNIA – RIVERSIDE

REIMBURSEMENT POLICY FOR EXPENSES

1. Purpose
The purpose of this policy is to provide guidelines for member reimbursements of expenses for the Circle K International: University of California Riverside organization. This policy follows what the 2011-2012 Elected Board deems as the plan rules for reimbursement. Expense reimbursements must meet the following criteria:

1. Expenses must be relevant[1] to Circle K International: UC Riverside.
2. Expenses must be adequately accounted for within a reasonable period of time[2].
3. Amounts that are advanced that exceed expenses that have been accounted for must be returned to the club within a reasonable period of time.
4. All expenses must be preapproved by 3/5 of the Elected Board.
5. Members must submit request for reimbursement via the Reimbursement Form within 14 days of purchase of items.

As long as these rules are met, members will be able to receive a fair reimbursement for personal expenses made on behalf of the organization.

2. Scope
This policy applies to all paid members of the Circle K International: University of California Riverside organization. The guidelines for this policy address specific types of transactions, including but not limited to the following:

1. Travel
   a. Travel costs may include but are not limited to gas reimbursements or parking.
2. Supplies
   a. Supplies may include but are not limited to supplies for a service event, fundraiser, etc.
3. Member of the Month Dinners

3. Responsibilities For Reimbursement
Members (general and board members) should familiarize themselves with this policy. They should also familiarize themselves with the types of expenses that are eligible for

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[1] In order for an expense to be "relevant" to Circle K International: UC Riverside, the expense must be used in line

[2] A "reasonable period of time" denotes that those responsible for handling money must record all money transactions within 3days of transaction. Advanced expenses, on the other hand, must be returned by the end of week 5 of the current quarter or week 10, whichever falls within that time period.

reimbursement and with the process behind reimbursement. Officers (club and district) may not authorize reimbursement of their own personal expenses or personal expenses of other officers.

It is the responsibility of those approving reimbursement to ensure the following:

1. Expenses are incurred for the benefit and interest of the organization
2. Expenses are reasonable and incurred as outlined in this policy
3. Documentation is complete and concise, with **ORIGINAL** receipts to include names, titles, and purposes for the expense. Copies of all records must also be kept.
4. Reimbursement claims must be submitted within 14 days of incurring an expense.
5. The "Reimbursement Form" must also be completed in full in order to receive proper reimbursement. The following must be included on the "Reimbursement Form": in order to be considered fully completed:
    a. Name
    b. Total amount of expenses
    c. Date
    d. Receipt
    e. The purpose(s) of the expenditure

4. Approvals Of Reimbursement

The "Reimbursement Form," together with proper documentation, must be submitted to the Treasurer for review within 14 days of purchase of the goods for reimbursement. The reimbursement must be approved by 3/5 vote of the Elected Board. Upon approval, reimbursement to the member must be made within 14 days of approval. All expenses must be preapproved by 3/5 of the current year's Elected Board prior to purchase of goods.

5. Travel

1. Service Events[3]

    a. Mileage will be calculated as noted on the CERF of the event. If no CERF has been submitted, no reimbursement will be given.

    b. Reimbursement for driving to service events will be given during the break between each quarter.

    c. Drivers will be reimbursed $0.20 USD / 1 mile driven for the sake of service events.

    d. Reimbursement for driving to service events will be given to drivers regardless of whether or not they filled out a Reimbursement Form. However, if no CERF was submitted, then no reimbursement will be given for that event.

    e. Drivers who do not have any passengers in their car while driving to the service event will not be reimbursed. A minimum of 2 passengers must be in each car pending the count of attendees of the service event.

        i. If two or less attendees to the service event, then the driver will be reimbursed.

        ii. If in the case that the number of attendees is more than two but a driver must take one passenger, then all drivers will be reimbursed.

2. Social Events

[3] Please refer to section 5.3 to see exceptions to attending certain service events.

a. Drivers will not be reimbursed for social events.
b. Drivers may consult with their passengers for their own personal reimbursement.

3. District Events
    a. Fall Training Conference (FTC)
        i. Costs for driving expenses will be included in a member's cost to attend this event.
        ii. The extra cost will be determined by the current year's Elected and Appointed Board.
    b. District Large Scale Service Project (DLSSP)
        i. Refer back to section 5.1 (Service Events)
    c. Spring Training Conference
        i. Costs for driving expenses will be included in a member's cost to attend the event.
        ii. The extra cost will be determined by the current year's Elected and Appointed Board.
    d. District Convention (DCON)
        i. Costs for driving expenses will be included in a member's cost to attend the event.
        ii. The extra cost will be determined by the current year's Elected and Appointed Board.
    e. International Convention (ICON)
        i. Costs for attendance will be alleviated as much as possible.
        ii. The amount alleviated will be determined by the current year's Elected Board.
    f. Large Scale Service Project (LSSP)
        i. The cost for attending this service event will be alleviated as much as possible.
        ii. The amount alleviated will be determined by the current year's Elected Board.
4. Weekend of Awesomeness Weekend (WaW)
    a. A flat fee of $7.00 USD will be charged to each non-driving attendee.
    b. This fee will be taken from each passenger and given to their respective drivers.
    c. The organization will not reimburse for travel to WaW, whether there be a service event during the weekend or not.

6. Supplies

1. Purpose
    a. The purpose of this section is to detail the reimbursement for Board Members and general members who pay for extra goods outside of a Board Member's previously outlined budget or out of a general member's own personal money.
2. Board Members
    a. If a Board Member pays for goods outside of their approved budget for the benefit of the organization and wants reimbursement, that Board Member must submit a request for reimbursement via the Reimbursement Form.
    b. Board Members may request for an extra lump sum of money from the Treasurer if their own funds for the quarter have been expended. A hand-written request must be submitted to the Treasurer for review by the Elected Board.
    c. Extra expenses must be preapproved by 3/5 of the Elected Board.
3. General Members
    a. General Members must request preapproval from 3/5 of the Elected Board before

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making any kind of expense.
b. General Members must submit a Reimbursement Form in order to receive reimbursement for the expenses they have made for the organization.

7. Member of the Month Dinners (MoM)

The current month's Member of the Month is entitled to one dinner that will be paid by the organization in upwards of amount to $20 USD.

8. Conflict

In the event that a dispute shall arise, the dispute should be settled in the presence of the current year's Elected Board. If conflict still arises, then resolution should be reached through 3/5 vote of the current year's Elected Board.

9. Liabilities

Circle K International at UC Riverside and its officers do not assume any liability arising from this policy. There are no implied promises regarding reimbursements or any financial remuneration.

10. Amendments

This policy and any parts of this policy can be amended through approval of 2/3 of the current year's Board.

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APPENDIX | SAMPLE FUNDRAISER BUDGET

Income					
				Projected	Actual
Total Income				$ 1,375.00	$ 1,620.05
Item	*Selling Price*	*Est. Sales*	*Actual Sales*	*Projected*	*Actual*
Cash/Checks					
Presale/RSVP	$ 15.00	75	85	$ 1,125.00	$ 1,275.00
Door	$ 18.00	0	2	$ -	$ 36.00
AS Funding					
Funding	$ 200.00	1	1	$ 200.00	$ 200.00
				$ -	$ -
On-Site Fundraiser					
E-Board Dance/Songs	$ 109.05		1	$ 50.00	$ 109.05
				$ -	$ -
				$ -	$ -
Profit-Loss		*Projected* $ 310.00		*Actual*	$ 448.63

Notes

We had damaged the red block in Institute of the Americas, so that cost us $200 extra dollars. Also the song dedications have to be integrated better, it was disruptive during the banquet, but it was a overall good idea. We got funding from AS for the facility use. All the profits went to the club. Suggestions: Possibly buy more food because people were afraid that it would run out. Also make sure we take care of the facility and its equipment that we are using.

Expenses							
				Projected	Actual		
Total Expenses				$ 1,065.00	$ 1,171.42		
Item	*Unit Price*	*Amount*	*Qty*	*Projected*	*Actual*	*Store*	*Buyer*
Gifts							
Ikea Supplies	$ 13.02		1	$ 200.00	$ 13.02	Ikea	Angela Y
Target Supplies	$ 49.93		1	$ -	$ 49.93	Target	Stef Y
Walmart Supplies	$ 65.45		1	$ -	$ 65.45	Walmart	Stef Y
Party City Supplies	$ 44.49		1	$ -	$ 44.49	Party City	Stef Y
Facility Rental							
Weaver	$ 280.00	Room	1	$ 280.00	$ 280.00	Inst. Of Amer.	Angela Y/CK
A/V Use	$ 85.00		1	$ 85.00	$ 85.00	Inst. Of Amer.	Angela Y/CK
Red Block Repair	$ 200.00		1	$ -	$ 200.00	Inst. Of Amer.	Circle K
					$ -		
					$ -		
Food							
Katsu Chicken	$ 65.95	full pan	2	$ 500.00	$ 131.90	L&L HA BBQ	Circle K
BBQ Chicken	$ 70.95	full pan	1	$ -	$ 70.95	L&L HA BBQ	Circle K
Kalua Pork w/Cabbage	$ 80.95	full pan	1	$ -	$ 80.95	L&L HA BBQ	Circle K
Steamed White Rice	$ 33.95	full pan	1	$ -	$ 33.95	L&L HA BBQ	Circle K
Macaroni Salad	$ 44.95	full pan	1	$ -	$ 44.95	L&L HA BBQ	Circle K
Buddha's Delight	$ 35.95	full pan	1	$ -	$ 35.95	L&L HA BBQ	Circle K
Tax	$ 34.88		1	$ -	$ 34.88	L&L HA BBQ	Circle K
					$ -		
					$ -		

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APPENDIX | SAMPLE DONATION LETTER

American Eagle Outfitters Foundation
77 Hot Metal Street
Pittsburgh, PA 15203

To Whom It May Concern:

My name is Stefanie Chow, the 2010-2011 Circle K International External Fundraising Chair at the University of California, San Diego (UCSD). Circle K is the largest non-profit collegiate service organization in the world, pursuing projects from local soup kitchens and health conservation fairs, to housing construction and orphanage volunteering in Tijuana, Mexico. Last year, UCSD Circle K completed over 10,800 hours of community service and donated over $20,000 to charities such as UNICEF, Starlight Foundation, and the American Cancer Society.

On behalf of UCSD Circle K, I am requesting your support for our 13th annual Masquerade Ball, to be held on November 13th, 2010. Guests from all over California and Nevada are invited to a night aboard a three-decker yacht that sails around San Diego Harbor and includes a live DJ, dance floor, casino tables, raffle, and karaoke. This is our largest charity fundraiser, benefitting the Pediatric Trauma Program (PTP), which fights the statistic that unintentional injury is the #1 cause of death in children under fourteen years of age. Last year, we raised over $20,000 for PTP, providing medical equipment for children's hospitals, as well as educational child safety programs to prevent such injuries.

Each year, our annual raffle is a significant portion of the funds we donate to PTP. However, we cannot do this without contributions from supporting companies. We are currently accepting and would greatly appreciate monetary donations for logistical costs and/or gift donations for our raffle, including admissions tickets, gift certificates, and other tangible prizes.

We realize that business is important in this economy, so your donations will not go unrecognized. To promote organizations that contribute, names and logos of donating companies will be listed on our promotional videos, event programs, website, and other marketing materials distributed to thousands of invited guests throughout California and Nevada. Posters with donor names and logos will also be hung at our raffle station for all attendees to view.

Whether or not donations are available, please send a response to the following mailing address below or my email address (schow68@gmail.com). If this donations request is too early, let me know, and I will contact your organization at a later specified time. Kindly mail all contributions to the following address at your earliest convenience (no later than **October 31, 2010**):

Circle K International, MC 0078
University of California, San Diego
9500 Gilman Drive
La Jolla, CA 92093-0078

*Please make checks payable to UCSD Circle K International.

If you have questions or would like to know more about our organization and this event, please feel free to contact me via phone or email. Thank you for your time and consideration, and I hope to hear from you soon!

With Love and Service,

Stefanie Chow

Stefanie Chow

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FINANCE & FUNDRAISING COMMITTEE

[Circle K International | California-Nevada-Hawaii District]

MEETING AGENDA

TUESDAY, AUGUST 23RD, 2011 @ 9:10 PM | SKYPE, CONFERENCE CALL

I.	Call to Order	
II.	Introduction of Guests	
III.	DFI / TFC Manual	
	• DFI manual comments	*Stefanie*
	• Finding balance for membership fees	*Richard*
IV.	PayPal Donations	*Garvey*
V.	Fundraising Spotlight	*Stefanie*
	• CNH website feedback	*Don*
VI.	Crazy Kompetition Logistics	
	• List of things to bring (are we missing anything?)	*Hans*
	• Training videos	*Edwin*
	• Promotional video	*Tiffany*
VII.	Next Assignments & Meeting	
VIII.	Adjournment	

THANK YOU!

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FINANCE & FUNDRAISING COMMITTEE

[Circle K International | California-Nevada-Hawaii District]

MEETING MINUTES

THURSDAY, August 11TH, 2011 @ 09:00 PM | SKYPE, CONFERENCE CALL

I. Call to Order – 9:03 PM

II. Introduction of Guests

- Stefanie Chow (UCSD)
- Nam Hoang (UNR)
- Triana Crighton (UCD)
- Garvey Su (UCLA)
- Tiffany Por (UCR)
- Hans Meimban (UCR)
- Grace Go (UCB)
- Kenneth Lee (UCB)
- Edwin Lee
- Don Ta (UCI)
- Gerard Gaw (UCLA)

Minutes taken by: Triana Crighton (UCD)

III. DFI Group Projects

- Stefanie will make a "DFI Manual" using our DFI homework, which she will send to us.
- PTP (Nam, Gerard, Triana) – Three focuses: Treat patients, enlighten those on how to help the afflicted as well as those related to patients, research. Includes service events such as making PTP dolls and blankets, passing out safety items such as helmets, and small fundraisers.
- Project Eliminate (Don, Grace, Richard) – Raising money to provide immunization for neonatal. tetanus 1 child in 9 is affected and they get it from mothers. Mothers will be provided shots to help prevent the tetanus. Tetanus side effects include light/touch sensitivity and server seizures for children. We will be contributing through District event attendance by taking on $2 for FTC and DCON. These two dollars will go to Eliminate Project.
- Not For Sale (Tiffany, Garvey, Hans) – against any and all type or modern slavery across the world including child labor and sex trafficking. Funds go towards building shelter, medical care, and education for liberated slaves. They also aim to educate the community about the horrors of human slavery in other countries. FREE2Challenges which are different challenges/events organized by a group that charges as least $100 dollars for registration.
- Movie "The Dark Side of Chocolate" which documents the struggles of child slaves in Africa.
- All FiFun members should know all the DFI's inside and out! Stefanie will pop quiz us!

IV. Fundraising Spotlight

- District Goal: Advertise DSI/DFIs more. We will be advocates for DFIs and being educated and active is really important.

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- One way to advertise: fundraising meters. Meters will fill up as we raise more money. We need to set Fundraising goals!
- District Service Chair is having her committee select a charity each month which will be posted and advertised on the District site. We will do something similar – we will pick a club who raised money for a DFI and feature them on the District website. However, it is not limited to our schools, we can also spotlight other schools and community colleges.
- How should we go about choosing a fundraiser?
    - We can check for fundraisers through MRFs, but clubs don't always report all of their events.
    - We can make a Google form that Fundraising Chairs/Treasurers can apply with.
    - Two types of Spotlights : Large Scale and Small Scale.
    - Stefanie will talk it over with District Board to help decide how to choose fundraisers to spotlight.

V. CKI North and South Marketing
- Promo Videos and Music Videos – Hans is making a short one! This Sunday, DCON Committee will meet at the DCON hotel to film a promo video for DCON. We can meet up possibly to aid in the making of a promo video.
- Training Videos made for judges and games. "Playbook" which includes all information about the games and registration.
- Playbook – When each game is described, each step has a corresponding pictures.
- Contact Stefanie if you and your club are interested

VI. FiFun Committee Shirts
- What kind of shirt do we want? - Polos, Vnecks, tank tops
- Color? - Hot Pink, Teal, Gold and Blue, Teal

VII. Random Updates!
- Stefanie will be emailing us new assignments.
- Next meeting will change due to DSSS. It will possibly be on Mondays or Tuesdays.
- Richard will take next meeting's minutes!

VIII. Adjournment – 10:37 PM

THANK YOU!

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APPENDIX | CONTACT INFORMATION

If you have any questions, comments, or suggestions, please contact the District Treasurer or any of the Finance and Fundraising committee members below, and we would be more than happy to help you!

FULL NAME	POSITION TITLE	EMAIL ADDRESS
Shaira Ramirez-Santos	District Treasurer	treasurer@cnhcirclek.org
Adrian Cubas	Executive Assistant	wudrian@yahoo.com
Rendell Lopez	Crazy Komp North Chair	rendellrlopez@gmail.com
Ryan Luong	Crazy Komp South Chair	ryanaluong@gmail.com
Kevin Ru	DFI Ambassador	kevin.ru01@gmail.com
Alysha Jean Cabarrubias	Graphics and Promotions Chair	alyshacab97@gmail.com
Angelica Ubungen	Outreach Chair	angelicaubungen@gmail.com
Ly Dang	Outreach Chair	lydang1616@gmail.com
Anh Vo	Resource Chair	avvo@ucsd.edu
Naomi Chia	Resource Chair	chianaomi@yahoo.com

Thank you to past District Treasurers and FiFun Committees for helping to put this manual together!

The images in this manual were taken from Google Images.

You’re going to do incredible things.

Good luck!

Kiwanis®
Service Leadership Programs

8360 RED OAK STREET SUITE #201, RANCHO CUCAMONGA, CA 91730 US 1-909-989-1500