

Liberty Mutual Insurance Alumni Cup

2015 TOURNAMENT OPERATIONS MANUAL



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Liberty Mutual Insurance Alumni Cup

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Introduction

INTRODUCTION

The LIBERTY MUTUAL INSURANCE ALUMNI CUP is a national series of amateur golf tournaments each of which benefits a college or university alumni association. 2015 represents the fourth year of this growing program with the goal of extending the program to other college and university alumni association partners in future years. This year, your school's alumni association will be one of thirty to participate in this exciting new fundraising program. The program uniquely combines the prestigious tradition of Liberty Mutual Insurance with the philanthropic and enthusiastic alumni support of each participating college or university. In addition to Liberty Mutual Insurance, the event is supported nationally by TaylorMade adidas Golf as well as by the following national marketing partners: Sports Vision Eyewear, Golf Digest and All American Classics.

Local Alumni Cup tournaments are held throughout the country. Alumni Cup tournaments are generally scramble style competitions, but, please note, you are not required to change the format of your event if you and your tournament committee are happy with the way your event has been conducted previously. If you are looking for a competition format that will facilitate great fundraising, please consider the following all inclusive, easy to implement scramble format which enables golfers of varying levels of skill to participate in a competitive yet enjoyable tournament. Amateur golfers will play in teams of four. Your tournament may have an existing tournament format that is already in place and successful. If so, there is no need to change. If not, we suggest that you differentiate your event by (1) requiring that each team use at least two drives from all four players and (2) scoring the competition using team handicaps based on 35% of the lowest handicap player on the team.

The scramble format and USGA Handicap Index requirements make the Alumni Cup much more than just another amateur golf tournament: it is a pleasurable social event for participants and family members, as well as a benefit for a necessary and worthwhile cause.

The goal of the Alumni Cup is to distinguish your alumni association and the prestigious sponsors as participants in a high quality amateur golf event for a great cause. This operations manual provides the guidelines to conduct a successful tournament that will satisfy not only your financial goals but also satisfy the participating sponsors and golfers. When your organization conducts an Alumni Cup as outlined herein, it will have created a perennially successful fund-raising event.

By conducting an Alumni Cup tournament, your alumni association will tie itself inextricably with the upscale image of golf. As a result, each participating alumni association can enhance its presence within its own market, thereby increasing future donations. Golfers, particularly country club members, tend to be generous contributors to charity and alumni tend to be even more generous to their alma maters.

Entry fees for Alumni Cup events generally range from \$500 - \$10,000 for each team. The actual price will be determined by each local organization taking into account individual event costs and golfer/donor receptivity in each market. At a price of \$1,000 per team (significantly below the national average), an Alumni Cup tournament will generate gross revenues of \$36,000 before local sponsor contributions and ancillary fund-raising events are included.

Besides LIBERTY MUTUAL INSURANCE as the series sponsor, additional industry leading companies will contribute to your event. For 2015, these include TaylorMade adidas Golf, Sports Vision Eyewear, Golf Digest and All American Classics as national marketing partners. Your organization will also have the opportunity to recruit local sponsors for individual holes as well as sponsors for other events conducted in connection with each tournament. **Please bear in mind that, in return for their support, Liberty Mutual Insurance has been guaranteed exclusivity in their product and service categories** (see, National Sponsors, Section 3.0). Your national marketing partners are not guaranteed category exclusivity.

In addition, the Liberty Mutual Insurance Alumni Cup Awards Banquet will allow you to conduct ancillary fund-raisers such as auctions and raffles. With the assistance of ancillary fund-raising, the Alumni Cup should generate upwards of \$50,000 for your organization. A successful tournament this year will enhance the fund-raising potential of next year's tournament.

In recruiting local sponsors, each local charity benefits from a unique and powerful opportunity to align local sponsors with the Alumni Cup's National Sponsors creating a platform to provide local sponsors with image, status and results for their investment in the local event.

Rules and Regulations

1. Anti-Discrimination Policy

It is the policy of the sponsors of the Alumni Cup that all Alumni Cup events be conducted at country clubs and/or golf facilities which do not discriminate on the basis of race, gender or religion.

2. Tax Requirements

Tax laws require that charitable organizations must inform golfers that the amount of their entry fee is tax deductible only after the <u>fair market value</u> of greens fees, food, drink and other tangible gifts or services of <u>substantial</u> value are subtracted from the entry fee

In addition, any and all charitable gifts of \$250 or more must be substantiated in writing, including: A) amount of contribution, B) whether the charity provided goods and services in association with contribution, C) description and good faith estimate of value of any goods and services provided by the charity. To help diversify the costs of running an Alumni Cup tournament, please be sure to integrate other components of your organizations' programs and services into your local tournament; i.e. distribute organ donor cards to your golfers, include a charity "fact-sheet" in each registration packet, set up an educational display with various brochures, speak briefly on the work of the charity, etc.

The burden of taking the proper tax deduction is on the shoulders of our golfers; however, we are <u>required by law</u> to take additional responsibility in helping the golfers determine the proper deduction.

3. Tournament Format

While not required, it is suggested that each Alumni Cup tournament should consist of a shotgun start and an awards banquet. Afternoon starts are strongly preferred as morning shotguns are less convenient for your golfers and reduce the effectiveness of the post-round fundraising. A shotgun start is necessary to ensure that all participants complete their rounds at approximately the same time. A shotgun start is conducted in the following manner.

A fully subscribed tournament consists of 36 teams of four players each. Two teams will start play on each hole. The first team at each hole will tee off at a preannounced time. The second team will tee off when it is safe to play.

As noted earlier, it is strongly recommended that all Alumni Cup events use a four-person scramble format. In a scramble, on each hole, all four members of the team hit one tee shot. The team will then select the best shot from which to play the second shot. All members of the team will then hit a second shot from that position. This procedure is repeated until the ball is holed out. A team score, and a notation of which player's drive was used, is then recorded and the team moves on to the next hole. It is recommended (if possible) that a volunteer scorer be placed with each team in order to maintain the competitive integrity of the event.

If an event has had a successful history with another form of competition prior to becoming part of the Liberty Mutual Alumni Cup program, it is not necessary to change to a scramble format, or to change the current scramble format that is currently being used. As stated above, the goal of the Liberty Mutual Alumni Cup is to distinguish the participating alumni association and the prestigious sponsors as participants in a high quality amateur golf event for a great cause. If a tournament has demonstrated that it has achieved this goal with a format other than a scramble, the tournament does not have to alter its format to become an Alumni Cup event. That being said, it is our opinion that the format and rules that follow will offer a NEW or struggling event the best opportunity for success in attracting players and raising money.

4. Rules of Play

- a. Any high quality 18-hole golf course that does not discriminate on the basis of race, gender or religion is eligible to host a Liberty Mutual Alumni Cup Tournament.
- b. Except as set forth in this manual, play in Alumni Cup tournaments are governed by USGA Rules. Some rules may be modified by the local rules subcommittee.
 - a. Out of Bounds is defined by white stakes.
 - b. Water Hazards are defined by yellow stakes and lines.
 - c. Ground Under Repair is defined by white lines.
 - d. Lateral Hazards are defined by red stakes and lines.
- c. EACH player's tee shot must be used at least two (2) times. (It is very important to reiterate this rule before play begins).
- d. PLAY ALL BALLS UP! Lies may be improved anywhere on the course by placing the ball or using the clubhead.
- e. Each team member may hit his/her shot from within one club length (except while putting) of the shot selected by the team. However, the ball may not be placed closer to the hole. If the team plays the selected shot from the fairway, rough, bunker, hazard, or green fringe, the ball must be played from within one club length of the shot selected no nearer the hole and must remain within the same boundaries as the selected ball originally was found.
- f. The same rules hold true for putting. However, once a ball has been holed out, play is completed for that hole. Therefore, it is recommended that players not putt out until all players have attempted the putt from the selected position. The team is required to mark the selected shot and then re-mark the ball approximately 6 inches away. This allows the team to mark the ball so that all players can putt from the same spot without being disturbed by the ball marker.
- g. On the green, players may stand behind a teammate to help determine the line.

- h. The method of breaking ties will be matching cards. THERE ARE NO PLAYOFFS IN LIBERTY MUTUAL INSURANCE ALUMNI CUP EVENTS. Matching cards is a form of breaking ties where an arbitrator, the golf pro, determines the winning team by comparing the scorecards of the tied teams hole by hole. More specifically, the professional begins matching cards by comparing the scores of each team on the <u>Men's number one</u> (#1) handicap hole.
- i. If one team has a better score on the #1 handicap hole, that team wins. If the #1 handicap hole is tied, the #2 handicap hole is compared by the pro, and this process continues until a winning team is determined.

The host golf professional must be made aware of your rules or these rules in case participants have any questions. In addition to this manual, you can download a copy of the Liberty Mutual Insurance Alumni Cup Rules from <u>www.libertymutualInsurancealumnicup.com</u>. A copy of the rules should be provided to the host pro well in advance of the tournament. It is very important that these rules be handed out to all participants on the day of the event in order to effectively enforce the rules of play. Fill in pertinent details such as Hole-in-One location, etc., as well as adding any information you feel necessary. Consult with the golf professional for specific local rules.

Please note that if you are using the format we recommended above, be aware that a team that has less than four players is not eligible to win team prizes because they cannot meet the requirement that each team use at least two drives from all four players. Teams with less than four golfers must be notified <u>prior to teeing off</u> that they are ineligible for team prizes, however, failure to so notify shall not affect a team's eligibility. Although three-person teams are non-competing, the individual members of a three-person team are, however, eligible to win the individual prizes (longest drive, closest-to-the-pin, and hole-inone). All golfers on Alumni Cup events, whether they are members of competing foursomes or non-competing threesomes, are only permitted to take one shot from each ball location. In other words, under no circumstances can a golfer take a second shot at any time, on behalf of an absent team member or otherwise.

5. Eligibility

Any amateur golfer can play in the Alumni Cup (all professional golfers, including those employed by golf clubs, country clubs, etc. are not permitted) provided he/she has paid the entry fee in advance. Each participant should provide his/her GHIN number (or comparable state handicap index materials) and present a USGA Handicap Index Card to be verified prior to the event. The local Tournament Committee or Chairman may provide golfers who do not have a USGA Handicap Index with a *Liberty Mutual Insurance Alumni Cup Handicap Index* that may be used for the tournament. In order to maintain the competitive integrity of your local tournament:

- * all participants should register on-site for themselves
- * all participants should provide a photo I.D at on-site registration
- all participants should provide Handicap Index verification information prior to the event

Photo IDs should be checked because a number of other amateur tournaments have had problems in the past with golfers playing under aliases or other persons' names.

While it is not required that all players on a team have a verifiable handicap, it is helpful that at least the best, or A player, on the team have a handicap as this player's handicap will be used to figure final scoring. The local Tournament Committee or Chairman may provide golfers who do not have a USGA Handicap Index with a Liberty Mutual Alumni Cup Handicap Index that may be used for the tournament. The Liberty Mutual Alumni Cup Handicap Index will be determined in accordance with the USGA's "Second Best Handicap" system as follows: To create a player's Second Best Handicap, the Tournament Committee simply asks each un-handicapped player to submit his/her three best scores made on a regulation course (one with par of 68 or more) in the last 12 months. The scorecards from these rounds should be attested to (i.e. signed) by the golf professional. The player's Second Best Handicap is the second best score he/she has given you minus 70 for men or 73 for women. For example, if a male player submits scores of 92, 96 and 98, his Second Best Handicap would be 96 (second best score) minus 70 (for men). Thus, his Liberty Mutual Alumni Cup Handicap Index would be 26.0.

Amateur women golfers are encouraged to play in the Alumni Cup. Women can play with the golfers of their choice in mixed or single sex teams.

On average, the women's tees should be set up approximately 40-45 yards ahead of the men's tees.

Liberty Mutual Alumni Cup Rules 2.1

6. Hole-In-One Rules

* The prize for the hole-in-one contest is:

- The "Old Course Experience" Trip for 2 to St. Andrews Scotland. The trip is valued at \$7,600 and does not include airfare.

* The Hole-In-One Contest must be at least 175 yards long, for men and women. You might want to have the men's tee be about 10 yards longer than the women's tee location;

* There must be two volunteers monitoring the trip Hole-In-One hole.

* Only the first hole-in-one at the designated Hole-in-One hole is a winner of the trip.

* Only players' first shots on each hole are eligible for prizes. Mulligans or any other second shots are not permitted on hole-in-one holes and are ineligible for prizes.

Trip details are provided below:

- * Three rounds of golf one the Old (guaranteed), one on Kingsbarns and one on the New or Jubilee courses
- * Three nights (sharing a room) in the five-star Old Course Hotel
- * Full Scottish breakfast each morning
- * Lunches each day in the clubhouse restaurants
- * Three course dinner in the hotel on one evening
- * Return transfers from your hotel to the golf courses each day
- * Driving Range privileges
- * Souvenir group photograph taken on the first tee of the Old Course
- * A generous range of official souvenir merchandise
- * A visit to the British Golf Museum
- * A dedicated Old Course Experience representative to co-ordinate your itinerary prior to arrival and available throughout your stay

Program valid on selected dates in 2016 (to be advised) and must be booked by September 30, 2015.

It is a mandatory requirement for play on the Old Course that golfers be in possession of a handicap certificate. The handicap limit for men is 24 and for ladies it is 36.

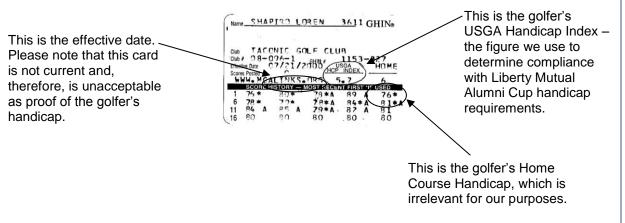
1. Team Formation

a. Assuming you are using our suggested format instead of some other format, each team must consist of four amateur golfers. There is no minimum or limit to each team's total USGA Handicap Index. The only handicap that will be applied to each team will be based on the handicap of the team's best player. For example, Team A is made up of four players whose handicaps are as follows: 4, 7, 23, 27. Team B is made up of four players whose handicaps are as follows: 8, 9, 18, and a player with no handicap. Our formula for determining each team's handicap is to take 35% of the team's best player's handicap and deduct that amount form the team's final score. In the case of the two teams described above, Team A would have a handicap of 1.4 (4 X .35) and Team B would have a handicap of 2.8 (8 X .35). If Team A shoot 65 for their round, the team's adjusted final score would be 63.6(65 - 1.4). If Team B shoots 66, the team's adjusted final score would be 63.2 (66 - 2.8). If there were the only two teams competing, Team B would be the winning team. PLEASE NOTE THAT THE LIBERTY MUTUAL ALUMNI CUP HANDICAP REQUIREMENTS REFER TO THE USGA HANDICAP INDEX --NOT THE HOME COURSE HANDICAP! The USGA Handicap Index is the number with a decimal point on each player's handicap card.

*Golfers should provide a copy of their current Handicap Index card and/or GHIN number as of/upon registration/payment, if available.

*A GHIN number is a form of identification, essentially a "golf social security number". GHIN stands for Golf Handicap Information Network. This network is administered by the United States Golf Association.

*A GHIN number is <u>not</u> the golfer's Handicap Index; it is a means of identifying golfers and a reference used to retrieve and verify golfers' Handicap Indexes.



2. Verifying Handicap Indexes

Accurate and thorough verification of your golfers' Handicap Indexes is an important component of the success of both your event and the program nationally. Ensuring that each golfer's Handicap Index is accurate and in compliance with the Handicap Index requirements of the Liberty Mutual Alumni Cup protects the integrity of your competition and protects your golfers from unscrupulous players. Few things are more damaging to a golf tournament than a suspicion among the competitors that one (or more) of the teams did not compete fairly.

The procedure for verifying your golfers' handicaps depends on whether the state golf association through which the golfer maintains his/her handicap is on the GHIN system. The majority of the states are on the GHIN system. You can verify GHIN handicaps at <u>www.ghin.com</u>.

Some states do not participate in the GHIN system and some individual clubs in GHIN states use other services to maintain their members' handicaps. A valuable site for verifying non-GHIN handicaps is <u>http://golfnet.com/tools/verification.htm</u>.

Lastly, all states have excellent state golf associations that can assist in player handicap verification. Don't hesitate to contact them.

Handicap Indexes 2.2

If you have one or more teams who do not conform with the program's team formation rules (i.e., they do not have four players on the team), these teams are not eligible to win any team prizes. You must make them aware of this before the competition. You should also have each member of the nonconforming team sign an acknowledgement (similar to the one below) that they are not eligible to compete for prizes.

[Date]

I, [golfer's name], understand that I am ineligible to receive any of the team prizes in the Liberty Mutual Alumni Cup because my team does not conform with the tournament's Team Formation Rules.

Signature

a. Verifying GHIN Handicap Indexes

Handicap Indexes can be verified on the Internet at <u>www.ghin.com</u>. Follow the instructions there to verify single golfers' or multiple golfers' USGA Handicap Indexes. You can also search for a person by name. This is particularly helpful in noting those players that have two or more Handicap Indexes. As stated on the previous page, if a golfer registers more than 60 days before the date of the tournament, his/her effective handicap date is 60 days before the event. A good policy is to verify Handicap Indexes every week once you are less than 60 days you're your tournament date. This site is extremely helpful for "day of the event" registration. If you have golfers who register the morning of your tournament, you can either go online or email their GHIN numbers to Skip Jenkins and, in most cases, he will be able to verify the golfers' handicaps before your tournament begins. This will enable you to avoid the difficult situation of waiting to verify handicaps until after scores have been turned in - which can result in teams being disqualified.

b. Verifying Non-GHIN Handicap Indexes

In addition to various internet sites (e.g., <u>http://golfnet.com/tools/verification.htm</u>), you have two sources available to verify Non-GHIN Handicap Indexes -- the pro at the golfer's home course and the state golf association. Both of these sources should be glad to help you. Golf pros are employed by their members. As such, it is part of their job responsibility to enable their members to play in outside events by assisting you in verifying Handicap Indexes. Problems occasionally arise when a golfer has given you a false Handicap Indexes. Problems occasionally arise when a golfer has given you a false Handicap Index because a pro may be unwilling to expose the member, who, after all, is his boss. The state golf associations will be more objective and dispassionate in verifying Handicap Indexes. It is part of their responsibility to protect the integrity of events in their state and thus they will be more willing to expose a falsified Handicap Index. State golf associations are not, however, always willing to verify large numbers of Handicap Indexes. Therefore, we recommend following these steps in verifying non-GHIN Handicap Indexes:

- 1. When each golfer registers, be sure to get a copy of his/her Handicap Index card and the name of his/her home course; or
- 2. Contact each golfer's home course and confirm his/her Handicap Index with the pro or his staff; or
- 3. Contact the state golf association to verify the Handicap Indexes of any golfers you have been unable to verify through their home course or about whom you have suspicions concerning the accuracy of their Handicap Indexes.

LIBERTY MUTUAL ALUMNI CUP TOURNAMENT OPERATIONS MANUAL

National Sponsors & Marketing Partners

Avoiding Conflicts with the National Sponsors 3.1

The success of the Liberty Mutual Insurance Alumni Cup, and the funds it generates for each participating Alumni Association, are dependent on the event's national sponsor and marketing partners, Liberty Mutual Insurance, TaylorMade adidas Golf, Sports Vision Eyewear, Golf Digest and All American Classics. In their sponsorship contracts. Liberty Mutual Insurance is guaranteed exclusivity in its property, casualty, life and business insurance categories. Therefore, companies which compete with the Liberty Mutual (i.e., property, casualty or life insurance companies; cannot be local sponsors of, or provide products to, Liberty Mutual Insurance Alumni Cup events. This prohibition extends to any sponsorship related in any way to the Alumni Cup, including, but not limited to, sponsorships of the golf tournament, hole sponsorships, hole-in-one contest sponsorships, and sponsorship of pre-tournament events such as Sunday night auctions, raffles or parties, skills challenges, shootouts, etc. Furthermore, no mention of a business in any of the product categories listed above should appear in any printed material, including tee markers, hole signs, programs, auction booklets, etc., or in any promotion of the tournament in print or electronic media. Complete compliance with these exclusivity requirements is extremely important. Each alumni association participating in the Alumni Cup has a contractual obligation with each national sponsor that will be breached by the inclusion of a sponsor's competitor as a local sponsor/in-kind provider. Such a breach jeopardizes the entire program. Accordingly, please be sensitive to the sponsors' needs.

If you have a situation that you believe may present a conflict please call either Loren Shapiro or Skip Jenkins at (781-440-6616) for assistance.

Liberty Mutual Insurance 3.2

The 2015 season represents the fourth year of Liberty Mutual Insurance's sponsorship of the Alumni Cup. As the title of this program implies, Liberty Mutual Insurance is your most vital sponsor and securing their continued support is a crucial part of your responsibilities. Liberty Mutual underwrites a significant portion of the costs of the national program, including the design and production of the golfer gifts and prizes and the management support that you receive from FMU.

As noted above, Liberty Mutual is guaranteed category exclusivity which means that no other property, casualty or life insurance companies can participate in your tournament – no local sponsorships, no on-site signage and no promotion of any kind. Health insurance companies, such as Blue Cross Blue Shield, or HMOs do not offer the same services as Liberty Mutual and, therefore, are not prohibited from participating in the Alumni Cup events. If you have any questions regarding exclusivity, please call Skip or Loren to discuss.

Liberty Mutual is sponsoring this nationwide program to strengthen their brand awareness across the country and to utilize the individual events to support the company's ongoing relationship with your alumni association. The events that comprise the Liberty Mutual Insurance Alumni Cup program align with Liberty Mutual's corporate responsibility positioning by doing the right thing and supporting charitable organizations across the country.

Liberty Mutual receives one complimentary foursome in each tournament. We request that your association not ask for additional financial support from Liberty Mutual. If Liberty Mutual wants additional foursomes, you can negotiate the price based on availability.

Provided that they comply with any team formation rules you employ locally, the Liberty Mutual foursomes should be eligible to win prizes.

TaylorMade adidas Golf 3.3

TaylorMade adidas Golf is the golf ball, golf club, golf shoe and golf apparel marketing partner of the Liberty Mutual Insurance Alumni Cup. As well as being one of the world's leading sports footwear and apparel companies, TaylorMade adidas is one of the world's premier golf equipment manufacturers and TaylorMade clubs and balls are played by many of the world's top tour pros.

TaylorMade provides a new TaylorMade SLDR Driver for each of your four winners and will provide four TaylorMade Golf Stand Bags to be awarded to the 3^{rdf} place team.

Additionally, TaylorMade will also provide three-ball sleeves of TaylorMade Distance golf balls to be distributed to each golfer in the gift packs.

While not required, every Liberty Mutual Alumni Cup event has the opportunity to purchase gifts for each player or prizes from TaylorMade adidas Golf at significant discounts. You will receive a catalog with apparel, golf shoe and accessory options to choose from.

If your contract with the host club requires you to spend money in the host golf course's pro shop, you should try to use that money to purchase TaylorMade adidas products. The purchased TaylorMade adidas product should be used as either a raffle prize or as an auction item. This will allow you to recoup the money you spend in the pro shop or potentially make a profit.

All American Classics 3.4

The Alumni Cup benefits from a great marketing partnership with All American Classics, one of the nation's leading sports memorabilia companies. All American Classics will provide each tournament with four framed photograph style trophies which will include your school's logo to be used as part of the first place prize (along with the TaylorMade Drivers). Lastly, All American Classics will send each event numerous pieces of location specific sports memorabilia on consignment for use at your auction. Unsold pieces can be returned to All American Classics at no charge. A representative from All American Classics will contact you well in advance of your event to discuss which specific pieces will be most effective for fund-raising efforts based on your location, attendees, etc.

These pieces can significantly benefit your bottom line and they should always be used in your auction. The four free pieces are provided in return for your commitment to use <u>the auction items.</u>



Sports Vision Eyewear 3.5

Sports Vision Eyewear joins the Liberty Mutual Alumni Cup as the program's official eyewear marketing partner. Sports Vision sunglasses not only protect golfers' eyes from harmful UV rays, some styles can actually improve performance by enhancing golfers' ability to visualize the variations on the putting green.

Each member of the 4th place team will receive a pair of Sports Vision sunglasses.

Each local event will also have the chance to purchase Sports Vision sunglasses as golfer gifts for the entire field of golfers. Sports Vision has put together attractive packages for your tournament. A document detailing these opportunities will be emailed to you separately.

Golf Digest 3.6

Golf Digest will provide each participant in the Alumni Cup with a one year subscription to Golf Digest, valued at \$47.88. Golfers who already subscribe to Golf Digest will receive a six-month subscription to Golf World, the industry's leading weekly magazine. It is crucial that all of your golfers' contact information and magazine preference are provided promptly to Skip Jenkins (see Section 5.9) so that the subscriptions can be processed quickly.

Liberty Mutual Insurance Alumni Cup Sponsor Contributions

Prizes	Retail Value	Per Event*
TaylorMade 3 Woods (1 st)	\$499.00	\$ 1,996.00
Championship Trophies All American Classics (1 st)	\$150.00	\$ 600.00
Liberty Mutual Leather Duffel Bags & Hats (2 nd)	\$275.00	\$ 1,100.00
Sports Vision (SVE) Titanium Sunglasses (3 rd)	\$299.00	\$ 1,196.00
TaylorMade Standing Golf Bag (4 th)	\$179.00	\$ 716.00
SVE Sunglasses (Closest to the Pin)	\$299.00	\$ 299.00
<u>Gifts</u> Liberty Mutual Computer Backpack Liberty Mutual Hat Liberty Mutual Ball Marker/Repair Tool TaylorMade Burner Balls (3-ball sleeve) Golf Digest Subscriptions	\$79.00 \$26.00 \$ 2.00 \$ 7.50 \$47.88	\$11,376.00 \$ 3,744.00 \$ 288.00 \$ 1,080.00 <u>\$ 6,894.72</u> \$29,289.72

* based on 144 golfers

- Recognition of all National Sponsors and Marketing Partners Liberty Mutual Insurance, TaylorMade adidas Golf, Sports Vision Eyewear, Golf Digest and All American Classics - in all collateral materials, rules sheets and all public announcements. The Liberty Mutual Insurance Alumni Cup should be identified as the series or umbrella sponsor.
- □ Enforcement of National Sponsors' contractually guaranteed product category exclusivity. No other companies in the following businesses may participate in your event in any way: life, auto, property, casualty or business insurance.
- □ Promotion of all hole-in-one, closest to the pin in all rules sheets and on the contest holes.
- Two Liberty Mutual Insurance Alumni Cup tee markers placed on each hole.
- □ Alumni Cup and National Sponsor signage (i.e., banners and tablecloth) at golfer registration table.
- □ National Sponsor signage in the banquet room with Liberty Mutual prominently placed to identify it as the series or umbrella sponsor.
- □ Use of the MC script provided in the Manual for the awards banquet. Ensure that Liberty Mutual is recognized as the series Sponsor. If you have time, please acknowledge TaylorMade adidas Golf, Sports Vision Eyewear, Golf Digest and All American Classic as National Marketing Partners.

Planning a Liberty Mutual Insurance Alumni Cup

The Tournament Committee 4.1

Your organization should create an Alumni Cup Golf Tournament Committee to schedule, plan, coordinate, and oversee all phases of your tournament. This Tournament Committee should consist of 18-25 members and should be comprised of board members, staff members, and volunteers. It should include the golfing enthusiasts among the businessmen and women of your community who are already affiliated with your organization.

After the creation of the Tournament Committee, individual committee members should be assigned the responsibility of carrying out the specific tasks necessary for an effective event. **All committee members must be responsible for golfer recruitment.** These members, or Leaders, will report their progress directly to the whole committee and the association's Executive Director/CEO.

The following are specific guidelines for the formation of an Alumni Cup Golf Tournament Committee and the selection of Leaders.

- 1. Each Alumni Cup Golf Tournament Committee should be co-chaired by a doctor, and/or a leading philanthropist, business or professional member of the community. This is important in order to create credibility and prestige for the event.
- 2. Each chairperson and Leader should be interested in golf and/or be influential in the community.
- 3. In selecting Chairpeople and Leaders, golfers on the board must recommend persons who can devote significant time and golfing enthusiasm.
- 4. A Vice Chairperson and an Honorary Chairperson (if possible) should be selected. These people should be well established and popular and either affiliated with your school or otherwise well known throughout the community. Local celebrities such as media or sports figures can serve well in this capacity. DON'T BE CHEAP! Celebrity involvement can increase paid attendance and revenues and will generate necessary publicity that both your national sponsors and your local sponsors demand in return for their sponsorship.

Specific functions of the Alumni Cup Golf Tournament Committee will include:

1. Recruiting golfers.

- 2. Delivering all sponsorship benefits and entitlements to the national sponsors.
- 3. Soliciting local sponsor foursomes (local sponsors MUST NOT conflict with National Sponsors, see Section 3.1). They will provide a financial contribution and additional prizes.
- 4. Soliciting sponsors to underwrite other fund-raising components of the event.
- 5. Planning ancillary fund-raising activities.
- 6. Arranging publicity and promotion of the tournament.
- 7. Developing a calendar for planning and conducting the event.
- Negotiating with your local club for all tournament requirements (See Section 6.1 for a sample agreement).
- 9. Enlisting local celebrity support.
- 10. Planning the Alumni Cup Awards Banquet.
- 11. Setting entry fees.

The most successful Alumni Cup events are those that have sizeable committees behind them. As you develop and work on your tournament(s), remember that your event will be a mirror image of your committee.

- Strive for at least 18 people on your committee. A large committee will recruit a large tournament field. Board members should be a part of your committee.
- Provide each committee member with a complete copy of a 2014 Liberty Mutual Alumni Cup Operations Manual.
- Fill your committee with well-to-do or well-placed people. They will recruit the same.
- Appoint a well known Alum, philanthropist, business person or professional leader as Chairperson. This will lend credibility and prestige to your event.
- Appoint a local celebrity as an Honorary Chairperson. Sports and Media figures will serve to increase paid attendance/revenue, and generate publicity.
- Tap into the various professional skills of your committee. Use marketing people to develop your sponsorship proposals and sales people to present them.
- Ask your golf pro and local Liberty Mutual representative to join your committee.
- Recruit several well known, knowledgeable golfers from your community.
- Ask last year's winning foursome to "give something back" by joining this year's tournament committee.
- Let committee members know what is expected of them:
 - 1. attendance at a maximum of 3-5 meetings
 - 2. responsibility of recruiting 2 foursomes
 - 3. sale of 1 hole sponsorship
 - 4. sale of 1 additional sponsorship
- Most importantly, make the committee meetings fun to attend. Provide food and drinks, and end on time.

Creating a committee this way is a proven formula for success. Eighteen committee members each securing 2 teams and 1 hole sponsor translates into a full field of 120 players and 18 hole sponsors and ensures a **minimum income of \$30,000**.

The Tournament Committee 4.1

Tips for Creating Successful Committees

- 1. Develop written statements of committee responsibilities, guidelines, and annual goals, and review and revise them periodically.
- 2. Appoint an effective chairperson who clearly understands the organization, the role of the committee, and the importance of conscientious committee leadership.
- 3. Choose committee members whose experience, skills, and interests support the goals of the committee and complement the abilities of their fellow members.
- Create written job descriptions for committee members. State expectations clearly. Distribute tasks reasonably among members. (Examples of committee member job descriptions can be found on the following pages).
- 5. Arrive at a clear understanding of the relationships and respective roles of board, committees, and staff.
- 6. Give committee members thorough information to aid in their decision making.
- 7. Set terms of service for committee members to ensure new perspectives and to give board members the opportunity to contribute in different areas.
- 8. Set meeting schedules well in advance, in consultation with members. Make effective use of meeting time by sending materials and an agenda to members well ahead of scheduled meetings and by moving through the agenda in a businesslike way.
- 9. Schedule an orientation for new committee members.
- 10. Conduct an annual evaluation to assess the committee's accomplishments in relation to its goals.
- 11. Recognize and express appreciation for the achievements of committee members.

<u>Title:</u> Chairperson, Liberty Mutual Alumni Cup Golf Tournament

Principal Role:

Leads steering committee that plans, executes and evaluates the Alumni Cup golf tournament. Oversees the budget, setting of priorities and objectives for the event, and organizes and manages recommendations from the committee regarding Alumni Cup activities.

Major Responsibilities/Tasks:

- 1. Recruit golfers.
- 2. Oversees the setting of priorities and objectives for the golf tournament and coordinates the event.
- 3. Manages the event's budget.
- 4. Assists in sponsorship, sales and obtaining underwriting dollars.
- 5. Presides at all golf tournament committee meetings.
- 6. Secures event location site and coordinates with site representatives.
- 7. Assists with securing auction items, prizes and awards.
- 8. Recruits and orients Committee members.
- 9. Assures that the tournament format meets requirements.
- 10. Conducts post event evaluation.

Qualifications:

- 1. Business and community contacts.
- 2. Leadership skills.
- 3. An experienced golfer.

Training:

- 1. Local orientation.
- 2. Ongoing at Committee meetings.
- 3. Consultation with Charity Staff.

Time Involvement:

Committee meetings: 2-4 hours monthly.

Ongoing activities: 10 hours monthly.

Just prior to and during event: up to 12 hours weekly and 10 hours the day of the event.

<u>*Title*</u>: Sponsorship/Player Coordinator, Liberty Mutual Insurance Alumni Cup Golf Tournament

Principal Role:

Oversees the recruitment of corporate sponsors and individual players.

Responsible to:

Golf Tournament Chair

Major Responsibilities/Tasks:

- 1. Recruit golfers.
- 2. Oversees and motivates entire committee to recruit sponsors and players.
- 3. Taps into corporate sponsorship budgets in a timely manner.
- 4. Draws upon entire committee, Board of Directors, etc. for potential contacts.
- 5. Builds a prospect master list of potential sponsor/players to meet goals.
- 6. Organizes efforts to "sell out" event.
- 7. Works with Chair to assign holes to sponsors for signage.
- 8. Works with Promotion Coordinator regarding sponsor recognition.

Qualifications:

- 1. Good corporate and community contacts.
- 2. Excellent communication and organizational skills.
- 3. Sales, marketing or fund-raising experience.

Training:

- 1. Orientation.
- 2. Ongoing at Committee meetings.
- 3. Consultation with Chair, as needed.

Time Involvement:

Committee meetings: 2-4 hours monthly.

Ongoing activities: 10 hours monthly.

Just prior to and during event: up to 10 hours weekly and 10 hours the day of the event.

<u>Title</u>: Tournament Coordinator, Liberty Mutual Insurance Alumni Cup Golf Tournament

Principal Role:

Orchestrates tournament and is responsible for all golf logistical details.

Responsible to:

Golf Tournament Chair

Major Responsibilities/Tasks:

- 1. Recruit golfers.
- 2. Works with site representative to orchestrate the operational aspects of the tournament, including:
 - a. Tournament format
 - b. Hole contests
 - c. Handicaps, pairings, scoring
 - d. Carts
 - e. etc.
- 3. Determines needs for tournament and works with other coordinators to meet these needs (i.e., equipment, tables, etc.).
- 4. During the tournament is the chief decision maker and problem solver regarding all tournament activities (does not play in the tournament).
- 5. Coordinates on-course refreshments.
- 6. Oversees dinner logistics.

Qualifications:

- 1. Strong golf background.
- 2. Organizational and leadership skills.

Training:

- 1. Orientation.
- 2. Ongoing at Committee meetings.
- 3. Consultation with Chair, as needed.

Time Involvement:

Committee meetings: 2-4 hours monthly.

Ongoing activities: 6 hours monthly.

Just prior to and during event: up to 12 hours weekly and 10 hours the day of the event.

<u>*Title*</u>: Gifts/Prizes/In Kind Donations Coordinator, Liberty Mutual Insurance Alumni Cup Golf Tournament

Principal Role:

Solicits prizes for auction, raffle and contests, solicits gift bag items and obtains in kind donations.

Responsible to:

Golf Tournament Chair

Major Responsibilities/Tasks:

- 1. Recruit golfers.
- 2. Develop master list with committee on merchandise needs for: prizes, gift bags, raffle, hole contests, door prizes, beverages, food, etc.
- 3. Recruit committee members.
- 4. Develop resources for obtaining items and develop strategy for approaching sponsors.
- 5. Inventory donations and submit report to the Chair on a monthly basis.
- 6. Prepare thank you list for program.
- 7. Arrange for delivery of donations.
- 8. Assist in distribution of gifts/prizes to winners.
- 9. Thank all donors.

Qualifications:

- 1. Contacts in appropriate businesses.
- 2. Organizational and leadership skills.

Training:

- 1. Orientation.
- 2. Ongoing at Committee meetings.
- 3. Consultation with Chair, as needed.

Time Involvement:

Committee meetings: 2-4 hours monthly.

Ongoing activities: 10 hours monthly.

Just prior to and during event: up to 10 hours weekly and 10 hours the day of the event.

<u>*Title*</u>: Promotion and Public Relations Coordinator, Liberty Mutual Insurance Alumni Cup Golf Tournament

Principal Role:

Coordinates public relations and promotion of the event.

Responsible to:

Golf Tournament Chair

Major Responsibilities/Tasks:

- 1. Recruit golfers.
- 2. Develops and manages public relations and promotion plan including creation of event specific website.
- 3. Oversee all printing, mailings, online promotion and communication.
- 4. Oversee use of social media (Facebook, Twitter, etc.) to promote event.
- 5. Develops and coordinates agenda for dinner ceremony; recruits emcee.
- 6. Handles all press, media and online promotion (including the school's websites, newsletters and other communication vehicles).
- 7. Secures a photographer.
- 8. Orders plaques, trophies and updates signage.

Qualifications:

- 1. Experience in public relations, promotion, media relations and printing.
- 2. Excellent communication and organizational skills.

Training:

- 1. Orientation.
- 2. Ongoing at Committee meetings.
- 3. Consultation with Chair, as needed.

Time Involvement:

Committee meetings: 2-4 hours monthly.

Ongoing activities: 10 hours monthly.

Just prior to and during event: up to 10 hours weekly and 10 hours the day of the event.

<u>Title</u>: Volunteer Coordinator, Liberty Mutual Insurance Alumni Cup Golf Tournament

Principal Role:

Recruits and trains volunteers to assist with event.

Responsible to:

Golf Tournament Chair

Major Responsibilities/Tasks:

- 1. Recruit golfers.
- 2. Develop master list of past and potential volunteers to reach number of volunteers needed.
- 3. Recruits volunteers by sending invitations, telephoning, etc.
- 4. Trains volunteers for their positions and confirms their participation.
- 5. Maintains records of volunteers.
- 6. Supervises volunteers during event and makes assignments.
- 7. Provides thanks and recognition to event volunteers.

Qualifications:

- 1. Knowledge about the game of golf.
- 2. Good community contacts.
- 3. Management/leadership skills.

Training:

- 1. Orientation.
- 2. Ongoing at Committee meetings.
- 3. Consultation with Chair, as needed.

Time Involvement:

Committee meetings: 2-4 hours monthly.

Ongoing activities: 8 hours monthly.

Just prior to and during event: up to 12 hours weekly and 10 hours the day of the event.

<u>*Title*</u>: Celebrity Recruitment Coordinator, Liberty Mutual Insurance Alumni Cup Golf Tournament

Principal Role:

Oversees the recruitment of celebrities.

Responsible to:

Golf Tournament Chair

Major Responsibilities/Tasks:

- 1. Recruit golfers.
- 2. Develops list of potential celebrities.
- 3. Writes letter or makes phone calls to targeted celebrities.
- 4. Make follow-up calls to confirm participants.
- 5. Assist with "day of" logistics.

Qualifications:

- 1. Good community contacts.
- 2. Excellent written and oral communication skills.

Training:

- 1. Orientation.
- 2. Ongoing at Committee meetings.
- 3. Consultation with Chair, as needed.

Time Involvement:

Committee meetings: 2-4 hours monthly.

Ongoing activities: 8 hours monthly.

Just prior to and during event: up to 10 hours weekly and 10 hours the day of the event.

Volunteer Scorers 4.2

While **NOT** required in any way, successfully recruiting enough volunteers to provide scorers for each foursome is a tremendous benefit to your competition and one that the golfers sincerely appreciate. Having an independent person verify each team's score reduces the possibility of cheating thereby increasing the integrity of your event. Most of your golfers participate in many charity scramble golf tournaments each year; few of these tournaments will safeguard against cheating by providing scorers. This unique additional benefit will help secure your players for years to come.

Volunteers have two primary responsibilities: counting the number of strokes the team takes on each hole and recording which player's drive was selected on each hole. Although the scorers do not need to be experts on golf or the USGA rules, they do need to be educated on how the tournament works and become familiar with the Liberty Mutual Insurance Alumni Cup format and rules. Scorers should be provided with an instructions sheet setting forth their responsibilities for the day and a scoresheet to record the team's score and drive selection.

Following the round the scorers will review the scores with their teams hole by hole to confirm that their scores are in agreement. Both the scorer and a member of the team will then sign the official scorecard that is turned in to the pro.

On the following pages are examples of an instruction sheet and score sheet that we have used successfully in the past.

Volunteer Scorers 4.2 LIBERTY MUTUAL INSURANCE ALUMNI CUP SCORESHEET DAY, 00/00/2014 STARTING HOLE: PLAYERS' NAMES: _, ___ SCORER'S NAME: ** Be sure to begin entering scores at the starting hole ** HOLE DRIVE USED (Player's Name) SCORE 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 TOTAL PLAYER'S SIGNATURE: SCORER'S SIGNATURE:

The Planning Calendar 4.3

1. Developing a Tournament Calendar

Planning an Alumni Cup is a year-long process. It should begin in the fall prior to your event. Below is an example of an outline of the steps to be taken in the fall, winter and spring months in preparation of your event (also on this page is a more detailed schedule of the tasks to be completed in the final 12 weeks prior to the tournament).

SEPTEMBER	Begin local sponsor solicitation Begin Committee development
OCTOBER	Secure site and date with contract Mail "Save the Date" notes to past participants
NOVEMBER	Delegate specific objectives to Committee members
DECEMBER	Secure major sponsorships Solicit auction-raffle items
JANUARY	Sell remaining program space
FEBRUARY	Re-contact sponsors yet to commit to this year's program
MARCH	Mail invitations for remaining positions
APRIL	Order shirts and/or other items for player gifts Recruit volunteer scorers and on-site registration workers

Based on these steps, you should create a detailed tournament calendar specifically for your event. A tournament calendar must be created to insure that all the necessary tasks are carried out according to schedule. To prepare this timetable, the following steps must be taken.

- 1. Select a suitable site to conduct your Alumni Cup. Sign an agreement with the course and host club professional (please refer to the standard agreement in Section 6.1) with a date that allows at least twelve (12) weeks of planning time.
- 2. <u>Promptly notify Fortune Marketing Unlimited of the tournament date</u> and specifics.
- 3. Once the date, site, and specifics are approved, they must be publicized.
- 4. Should your date or site change, you must immediately notify Fortune Marketing Unlimited.

2. Timeline for Success

The ideal scenario for planning an Alumni Cup begins approximately one year ahead of the tournament date. Below is a sample timeline that will assist you in planning for your event:

10-12 months prior to the tournament:

- ✓ Recruit and establish your committee members. Major criteria for candidates should be their ability to secure a minimum of two foursome sponsors as well as other local and statewide sponsors that will participate in the upcoming Alumni Cup.
- Draft a preliminary agenda for your Alumni Cup to include timetables for tournament start & end times, pre/post events, etc.
- ✓ Determine monthly meetings schedule with staff and volunteers.
- ✓ Establish sponsorship levels and create stock proposals and cover letters.
- Create and categorize a 'cold call' list of **major** local sponsor prospects that all committee members can call upon. The list should include company & contact names and phone #'s and/or email addresses. Create individual call report log sheets for volunteers to maintain and review at committee meetings.
- Establish your event budget utilizing Excel worksheet to track income and expenses throughout the planning stages of the event.
- Determine location of event. Initiate negotiations with golf course and follow up with signed contract.
- Direct mail and/or e-mail a "Save the Date" notification to past participants and forthcoming prospects. Include a sales collateral piece that will highlight Liberty Mutual Alumni Cup initiatives, sponsorship options, and golf club teaser.
- ✓ Call on existing prospects to secure repeat sponsor commitments.

The Planning Calendar 4.3

8-10 months prior to the tournament:

- ✓ Delegate specific objectives of committee members, establish subcommittees and, as a group, assist one another with the development of individual timelines for each sub-committee member.
- ✓ Secure major sponsorships for various elements of event to include:
 - Food and Beverage Donations/Sponsors
 - Golf Shirt Sponsors
 - Contest Sponsors
 - Ancillary event Sponsors
- ✓ Begin soliciting for major auction/raffle items.
- ✓ Establish media campaign and initiate solicitation efforts for the same.

6-8 months prior to the tournament:

- ✓ Direct mail and/or e-mail a follow-up "The Field is Filling Up" notification to past participants and prospects. Include all available sponsorship options.
- ✓ Determine on-site volunteer needs and recruit individuals/groups.
- Establish and categorize a 'cold call' list of Hole Sponsors and other miscellaneous local sponsor prospects that all committee members can call upon. The list should include company & contact names and phone #'s and/or email addresses. Create a call report log sheet for volunteers to maintain and review at committee meetings.
- ✓ Compile a list of local celebrities to be contacted as possible guest speaker, honorary chairperson, and participant.
- ✓ Build website dedicated to promoting your event.

4-6 months prior to the tournament:

- ✓ Schedule 'Critical Path' committee meeting to review:
 - Budget as it relates to income/expense status
 - Individual committee members cold call reports and sponsorship updates
 - Sub-committee reports
 - Media campaign status
 - Ancillary fundraising initiatives
- \checkmark Continue soliciting auction & raffle items.
- ✓ Design invitations and review distribution list for discrepancies, additions and overall efficiency for a direct mail/email process.
- ✓ Direct mail/email a 'teaser' flyer to invitation/solicitation list.

The Planning Calendar 4.3

4.3

- ✓ Schedule a 'Critical Path' committee meeting to review and update:
 - Budget as it relates to income/expense status
 - Individual committee members cold call reports and sponsorship updates
 - Sub-committee reports
 - Media campaign status
 - Ancillary fundraising initiatives
- ✓ Schedule a meeting with golf course management to review logistics & time frames.
- Meet with your local Liberty Mutual representative to discuss plans for the event and the dealer's responsibilities.
- ✓ Mail/email Invitations to event.
- Commence your publicity campaign by submitting the introductory Public Service Announcement (PSA) to local television and radio stations.
- ✓ Provide posters and brochures to private and public clubs, athletic clubs, sporting goods stores and other logical places of business.

2 months prior to the tournament:

- ✓ Schedule a full status committee meeting to evaluate overall progress:
 - Budget as it relates to income/expense status
 - Cold call reports and sponsorship updates
 - Sub-committee reports
 - Media campaign status
 - Ancillary fundraising initiatives
- ✓ Tabulate the number of confirmed golfers and continue to recruit until 144 or more are secured. Remember that a morning shotgun can be deployed to accommodate overflow.
- ✓ Determine on-site volunteer needs, specifically scorers for each foursome.
- ✓ Provide additional brochures to private and public clubs, athletic clubs, sporting goods stores and other logical places of business.
- ✓ Submit press releases to local chambers, newspaper, TV and radio stations, and other applicable resources.
- Arrange promotional appearances for tournament chairs on local radio and TV sports shows.
- Arrange promotional appearances for tournament chairs on local radio and TV sports shows.

- Verify USGA handicap indexes of participants to determine eligibility. Contact golfers' home course or state golf association to verify handicaps <u>not</u> on the GHIN system.
- ✓ Place shirt orders and/or Sports Vision sunglasses with Fortune Marketing.
- Schedule a meeting with your local Liberty Mutual representative to review their level of participation and overall time frames of event.

One month prior to the tournament:

- ✓ Schedule a committee meeting at golf club that is host to the Liberty Mutual Alumni Cup. Conduct a walk-thru with all staff, committee members and volunteers for familiarity purposes and to determine logistics and placement.
- ✓ Review the following:
 - Budget as it relates to income/expense status
 - Cold call reports and sponsorship updates
 - Sub-committee reports
 - Media campaign status
 - Ancillary fundraising initiatives
- ✓ Meet with the head golf pro to review:
 - Rules and regulations of Liberty Mutual Alumni Cup
 - Team check-in and shotgun start times
 - Test drive program needs
 - Handicap index verifications
 - Scoring
 - Course set-up
 - Registration process
 - Food and beverage set up
- ✓ Tabulate the number of confirmed golfers and continue to recruit until 144 or more are secured. Remember that a morning shotgun can be deployed to accommodate overflow.
- ✓ Develop a pre-tournament news release to send to all local media.
- ✓ Conduct inventory of all prizes and gifts to ensure accuracy.
- ✓ Continue to verify handicaps to determine eligibility.
- ✓ Finalize plans for awards banquet and other pre-post tournament activities.
- ✓ Tabulate volunteer force for day of event to determine additional needs. Assign a committee member to oversee scorers and rule and regulations process.

The Planning Calendar 4.3

Two weeks prior to the tournament:

- ✓ Schedule a full status committee meeting to evaluate overall progress:
 - Budget as it relates to income/expense status
 - Cold call reports and sponsorship updates
 - Sub-committee reports
 - Media campaign status
 - Ancillary fundraising initiatives
- ✓ Finalize the media campaign with your publicity sub-committee member/s to confirm times and dates for Alumni Cup coverage and participation.
- ✓ Prepare a checklist and staff/volunteer assignments for day of event. Review at committee meeting.
- ✓ Tabulate the number of confirmed golfers and continue to recruit until 144 or more are secured.
- ✓ Organize pairings list for submission to golf pro. Include a rules and regulations sheet to be placed on each golfer's cart.
- ✓ Finalize all food and beverage arrangements providing guarantees where applicable.
- ✓ Continue to verify handicaps to determine eligibility.
- ✓ Verify all signage and banner needs and placement.
- ✓ Conduct a final check of prizes.
- Confirm all details of registration process and develop an efficient process for the same. Check to see if you have all the necessary supplies to include forms, pens/pencils, credit card processing machines, golfer goodie bags, shirts, etc.

One week prior to tournament:

- ✓ Submit final report of entrants to the Alumni Cup Golf Tournament Committee so any necessary last minute pairings may be made.
- ✓ Submit your news release to the media
- ✓ Conduct a final check of details with:
 - Golf club and head pro
 - Major sponsors
 - Liberty Mutual Insurance representative
 - Pre/post event contacts
- Make sure that all banners (hanging and flying), pop-up signs, tablecloths, tents, score sheets, tee markers (two per tee) and other signage are onsite and ready for display.
- Pre-determine a set arrival time for all staff/committee to be at golf club on day of event. Review checklist of individual responsibilities.
- ✓ Confirm all volunteers and job responsibilities. Make the necessary food and beverage arrangements for volunteers and continually thank them for their time and support.

Tournament Day

Arrival to golf club by all staff and volunteers. Submit individual instructions to all personnel.

Execute event.

Post Event

- Email Excel database with all participants' contact information to Skip Jenkins at skip@fortune-marketing.com.
- ✓ Post your tournament results online or provide them to Skip Jenkins.

Your Committee is responsible for recruiting 120 or more golfers per event. Every effort must be exerted to achieve this level of participation. Do not sell yourself short by hosting an event with less than 120 golfers.

The Committee's first task will be to compile a target list of golfers from alumni mailing lists and/or contacts, local golf club membership lists, amateur golf association lists, business employee lists, and other fund-raising lists. In addition, the Chairman must ask each Committee member to submit his/her own target list of potential participants. In conjunction with a compiled master list, the Chairman must coordinate with each Committee member to systematically ask these potential participants either by phone or in person to play in the tournament. Invitations should be sent to all potential players. Personalized invitations will work best. The best formula for a full-field tournament is to have 18 Committee members each recruit two foursomes and one local sponsor.

- Once a potential golfer receives an invitation to play, he or she must then be personally asked to play and/or contribute.
- Do not depend on a golfer to participate until he or she has actually paid the entry fee.

Each week, the Leader must submit the responses of those contacted to the Committee. At this point, the total number of paid golfers should be determined and a new list of prospective participants compiled. One week later, the total number of golfers who have paid to participate must again be compiled. This process should continue until the tournament is filled with 144 or more paid golfers.

NOTE: Your event <u>will fail</u> if you rely only on website traffic, posters, mailings, and group emails to produce golfers and entry fees. <u>People donate to people!</u> You need to reach out to people individually to secure their support.

One of the primary target audiences for Golfer Recruitment will be the employees of local companies. These companies can provide you with numerous foursomes for competition. Many companies schedule golf outings for their employees. You should try to persuade local companies to make their corporate outing part of the Alumni Cup. With permission, posters should be placed in visible areas of each company's building.

Corporations often use golf outings to say "thank you" to their clients. The Alumni Cup offers corporations an opportunity to entertain their clients in a high quality, pleasurable, and competitive atmosphere. You must sell upper management on the proposal. Consider development of a localized packet on the Liberty Mutual Alumni Cup explaining how the companies can benefit from an involvement with this prestigious event. Most importantly, remind upper management that all proceeds benefit your charity. Whether a company buys two teams to entertain clients or the full field of 36 teams, the corporate outing approach is a win-win for all parties.

Promotional Materials 4.5

While the goal of the Liberty Mutual Alumni Cup is to promote your college or university and to help your event raise more money, it is important that all locally printed materials be personalized with the names of your national sponsors: Liberty Mutual Insurance and TaylorMade adidas Golf. If you have room and would like to acknowledge the program's national marketing partners (Sports Vision Eyewear, Golf Digest and All American Classics), that would be appreciated. Please refer to them in all materials and exactly as shown below.

You can download electronic images of all the sponsor logos, program cover, the registration form, posters, stationery and brochures by visiting <u>http://libertymutualac.com/</u>. The user name is **tepel** and the password is **golfpro**.

These files can be used to create your locally-produced event programs and other materials.

Invitation Letter 4.6

Example of an "Invitation-to-Play" Letter

THIS LETTER SHOULD BE PRINTED ON EVENT/ALUMNI ASSOCIATION LETTERHEAD

Dear (Mr./Ms.):

(Prominent Alumna's Name) and the (Alumni Association Name) cordially invite you to participate in the (Alumni Association) Golf Tournament part of the Liberty Mutual Insurance Alumni Cup to be held at (Club Name) on (Day), (Date).

The (Association Name) Liberty Mutual Insurance Alumni Cup will raise much needed funds for (college or university) this year. The Alumni Cup provides members of the winning team with TaylorMade Drivers and other top teams will win prizes from Liberty Mutual Insurance, TaylorMade adidas and Sports Vision Eyewear.

Golfers of all skill levels are encouraged to participate in this nationwide scramble series. Participants can form their own teams or be placed with other participants/alumnae by our office. Teams must consist of four amateur players. Everyone, men and women, scratch golfers and high handicappers, will have a chance to compete and win great prizes.

A volunteer from the (Alumni Association Name) will call in a day or two to ask you to be part of this worthwhile event. I am sure that you will enjoy this day of golf for the (Alumni Association Name).

Sincerely,

(ALUMNI CHAIRPERSON'S NAME) or (PROMINENT CITIZEN'S NAME)

NOTE: Enclose a brochure with this mailing!

You have been provided with the name and contact information for the Liberty Mutual Insurance representative handling your event. This person is referred to internally at Liberty Mutual as the Event Director. Your Liberty Mutual Event Director may not be located in your immediate geographic area. This person may choose to enlist local Liberty Mutual staff members to help support your on-site needs. Liberty Mutual representatives have been encouraged to become involved in the event planning activities or to maintain communication with the tournament committee throughout the year, as appropriate.

You should contact your Liberty Mutual Event Director early. The Liberty Mutual Event Director's responsibilities include coordinating the complimentary Liberty Mutual foursome and communicating who will be filling those eight playing spots in your tournament.

In advance of your event you should expect to be contacted by Sports Vision Eyewear to explore opportunities with their products. Specifically, you should expect a call from Sandy Scherling, one of the principals at Sports Vision Eyewear. Sandy has a lot of experience with events like yours and is very creative in designing programs to enhance your tournament and help you generate additional revenue.

You will also be contacted by someone at All American Classics who will work with you to get your school logo (to customize the event trophy) and to determine the best items to ensure that the auction items they provide will generate as much money as possible for your association.

Communication with the other national sponsors – TaylorMade adidas Golf or Golf Digest – should be handled through Fortune Marketing. Please contact Skip Jenkins or Loren Shapiro if you have a need to communicate with any of these sponsors.

1. Local Sponsor Recruitment

The responsibilities of the Local Sponsor Recruitment Leader are to contact and enlist area businesses as local "hole" sponsors and as sponsors of the other various components of your event. Local hole sponsors cannot conflict with the national sponsors' product exclusivity (see Section 3.1). Each hole sponsor will be allowed to display only one (1) banner on one (1) hole during the tournament; hence the term "hole sponsor". Local companies should also be recruited to sponsor or underwrite your various tournament expenses. **The goal of the Local Sponsor Recruitment Leader is to have all costs underwritten by the event's sponsors.**

2. Methods to Increase your Net Income

- a. Make sure you have 18 or more people on your committee. Each committee member should have the responsibility of recruiting two foursomes and at least one local sponsor. This recruiting method should increase your bottom line by at least **\$3,000**.
- b. If your event has not changed its entry fee in a few years, you may be able to increase it by \$25 or more. With a full field of 120+ players this will generate an additional **\$3,000**.
- c. Run a \$1,000,000 Shoot-out and add **\$5,000** to your net. More Shoot-out details appear later in this section of the Manual.
- d. Make a collegiate challenge part of your Alumni Cup. Invite the top college football and/or basketball coaches from your school and from other rivalry schools in your area to play against each other and sell the opportunity to play with these celebrities. In addition to the premium you can charge to the golfers who want to play on the coaches' teams, your event will become more newsworthy and attract more sponsors and participants. Incorporating this competition into your event can generate an additional **\$10,000**.
- e. Create an advertising booklet and sell ads to local companies who want access to your participants. This item is easy to sell and produce and can add **\$4,000** to your net.
- f. Run a live and/or silent auction at your awards banquet. Sports memorabilia, dinners, event tickets, etc. can raise as much as **\$25,000** for you. **All American Classics** can and will help you with this!
- g. Run a Skins Game for the golfers. The charity pays out half the pot unless there are no skins in which event the charity keeps the whole pot. By charging \$50 per team you will net **\$750-\$1,500**.

- h. Run an additional putting contest. Charge \$5 per player or \$25 per team and conduct a competition for a locally donated prize. Some events give the winner a gift certificate or half the pot. Either way, you will make approximately **\$500**.
- i. Raffle off prize(s) donated locally (or purchased through the pro shop if you are required to spend money there). Be sensitive to sponsor conflicts. Raffles generally net **\$1,000-\$2,500**.
- j. Sell mulligans (limit of one per player) for \$10 each or \$40-\$50 per team and raise **\$1,500**.
- k. Sell sponsorship to the driving range or practice green areas. Increase your net by **\$1,000**.
- I. "Play with a Pro" allows you to use a local pro/long drive champion to sell the use of his drive on one hole for \$20. This will create another **\$250** of new money.
- m. Run a Grab Bag live auction. Solicit 20-30 small gifts from local companies like key chains, restaurant certificates, tickets to local events and put them in identical bags. One bag should be placed at each dinner table and one of these bags should have a prize of significant value. Each table will elect an auctioneer and auction the bags to the persons at that table. Everyone winning the auction gets some nice gifts and one lucky individual will win a valuable prize. This type of auction can raise **\$2,000**.
- n. Honor a high ranking political figure. This will increase the newsworthiness of your event, thus adding additional participants, and will also allow you to sell spots to play with the politician. Potential new net income of **\$5,000-\$10,000**.
- 0. Sell guest tickets to the awards dinner. This generates income through ticket sales and also increases the number of people bidding on auction items and purchasing raffle tickets. This will increase your net by at least **\$200**.
- p. Solicit one company to be the dominant local sponsor who gets identified in all Alumni Cup promotional pieces. For example: "The Liberty Mutual Insurance Alumni Cup hosted by Pepsi." This should add at least \$5,000 to your net income.
- q. Run a "Corporate Challenge" and encourage local companies to buy a foursome and hole sponsorship. The winning corporate team can receive a special Liberty Mutual Insurance Alumni Cup Corporate Challenge perennial trophy. Your net will increase by at least **\$2,500**.

- r. Enhance your event by providing golf shirts, windshirts or other Alumni Cup-logoed items and have a local sponsor underwrite the cost. More high quality golfer gifts translate into more golfers and an additional net of \$1,500-\$3,000.
- s. Sell sponsorship to the greens fees, golf carts, lunch, dinner or beverage cart and reduce costs by **\$3,000-\$10,000**.
- t. Mark a 20-foot circle around the pin on a par 3 hole. Golfers can bet \$5-\$100 that they will hit the ball inside the circle. If they do, they double their money. If they don't, the charity keeps the fee. This contest can raise at least \$500.
- u. Run a reverse raffle for \$50 per ticket and the winner will split the pot with the charity. A \$50 reverse raffle could raise an additional **\$2,500**.One of our partner universities used the 30 people on its committee to sell 10 tickets each for \$100 each with a prize of \$10,000. The Alumni Association netted \$20,000 on this raffle and it took less than one month to sell all of the tickets.

The monetary figures listed above are based on past experiences and are extremely conservative. Your numbers may be higher. If you are interested in using any of these methods to increase you revenue, please contact the Fortune Marketing Unlimited for more information.

Supertickets: One of our national sponsors, Sports Vision Eyewear, facilitates a proven promotional program through the use of Supertickets. Events that incorporated Supertickets in last year's fundraising strategy realized significant gains to the bottom line. Supertickets are also a great way to reach supporters of your event, who are willing to make a financial contribution but can't attend your event or don't play golf, but still enjoy the opportunity to win great prizes. Supertickets are extremely flexible, combining a scratch card game with the sale of packages of other benefits - you choose to include whatever elements you and your committees determine (mulligans, putting contests, long drive). You determine the Superticket resale cost based on prizes donated to your event as well as supplemental prizes donated by Sports Vision.

The \$1,000,000 Shoot-Out: An Ancillary Fund Raiser for the Alumni Cup

The \$1,000,000 Shoot-out is essentially an elaborate closest-to-the-pin contest that can supplement your Alumni Cup income. Instead of the winner taking home a small prize, they win the opportunity to hit a shot for \$1,000,000.

Players pay approximately \$10 each to participate in the Shoot-Out, which entitles them to one (1) shot on the par 3 hole that makes up the contest. The player who is closest-to-the-pin on this hole qualifies for a chance at \$1,000,000. Other players can qualify through a drawing. To generate an excited audience this drawing should take place on the eighteenth green, just prior to the shoot-out. The shots at the \$1,000,000 are taken from a specified distance on the 18th hole after the tournament is completed, creating a festive and exciting atmosphere for both the media and your other golfers.

a. Benefits

The \$1,000,000 Shoot-Out can renew players' and committee members' interest and enthusiasm in an established tournament, or boost an event that has not met your expectations. The Shoot-Out will bring additional media exposure to your event and organization. It will set your event apart from all others in your area and make the Alumni Cup the tournament to play in. More players will sign up for your Liberty Mutual Alumni Cup to have a chance to win \$1,000,000.Your Alumni Cup will make more money through entry fees for the Shoot-Out as well as the sale of the title sponsorship of your Shoot-Out.

As the Charity golf market becomes more and more cluttered, the \$1,000,000 Shoot-Out will differentiate your tournament. Financially, your tournament will benefit in three ways:

1. MORE PLAYERS

Your tournament field will grow as players will want to be part of this unique new event - The \$1,000,000 Shoot-Out. This growth will also provide a larger base for your other ancillary fund raisers such as auctions, raffles, mulligans, skins, etc.

- SHOOT-OUT ENTRY FEES Players pay approximately \$10 to participate. If 100 players compete, you just raised \$1,000.
- SALE OF \$1,000,000 SHOOT-OUT TITLE SPONSORSHIP This is a relatively easy sell because it provides such good value. The Shoot-Out title sponsor will receive great exposure via all media outlets, word of mouth and on-site signage. It is recommended that the Shoot-Out title sponsorship be sold for \$2,000-\$5,000.
 Ex: "The Liberty Mutual Insurance Alumni Cup featuring the Quaker Oats \$1,000,000 Shoot-Out"

ESTIMATED ADDITIONAL INCOME				
12 more players @ \$100 net each	=	\$1,200		
Shoot-Out Entry Fees	=	\$1,000		
Sale of Shoot-Out title sponsorship	=	\$2,000		
		\$4,200		

b. Media Exposure

The \$1,000,000 Shoot-Out is truly a made-for-TV event that is very attractive to local network affiliates. Often TV stations will broadcast their 6:00 PM sports segment live from the golf course and feature the shots for the \$1,000,000. The timing is perfect as your teams will have just finished their round.

Pre-tournament press releases will have a better chance of being placed as the \$1,000,000 Shoot-Out makes them more interesting and noteworthy. The topic of \$1,000,000 will give radio personalities a lot to banter about.

Both the TV and Radio Public Service Announcements can be tagged with information on the \$1,000,000 Shoot-Out.

The exposure generated by the Shoot-Out will not only benefit the Title Sponsor but also all other local sponsors. You will now be able to justify an increase in all local sponsorship fees.

c. Promotion

The real value to you as a tournament organizer lies in the pre-tournament promotions. For this reason it is important to decide to implement the Shoot-Out approximately ten (10) weeks prior to your tournament date.

It is very important to include information on the Shoot-Out in all of your mailings, brochures, etc. to potential golfers. Your Shoot-Out title sponsor will also want this pre-tournament exposure.

d. Insurance

Several companies (not including Liberty Mutual) provide insurance for events such as the \$1,000,000 Shoot-Out. Premiums range from approximately \$400-\$650 depending on the company and the yardage from which the two shots are taken. Premiums are slightly lower if the shots are from 165 yards as opposed to 150 yards.

Most companies require that the shots for the \$1,000,000 be witnessed by the Head Golf Professional and a police officer. Other insurers require that the shots be videotaped. This is easily accomplished if TV crews are covering the event.

The following insurer is familiar with the Liberty Mutual Insurance Alumni Cup \$1,000,000 Shoot-Out concept and has agreed to provide you with excellent rates:

Tournament Golf Solutions Attn: Tim Mort 117 Black Oak Drive Medford, OR 97504 (541) 601-6344

e. Staffing and Timing

Implementing the Shoot-Out is very easy and requires little staff time. If promoted properly it will take care of itself. The day of your Alumni Cup you will need a volunteer to sell tickets to participate in the Shoot-Out, much like the sale of mulligans.

To encourage pre-tournament sales, a package of items can be offered on the entry form (i.e., Shoot-Out entry, Mulligan, and 5 raffle tickets for \$50 or Shoot-Out entry fee can be incorporated within a larger tournament entry fee).

A volunteer will be needed to measure the shots on the par 3 hole(s) to be used in the contest.

As with any local sponsor it is important that your local Shoot-Out sponsor (or the additional prizes provided by the insurance company) does not conflict with your National Sponsors: Liberty Mutual Insurance, TaylorMade adidas Golf, Polaroid, Sports Vision Eyewear, Golf Digest or with All American Classics.

12 weeks prior 8-10 weeks prior 9 weeks prior	- - -	Propose to Committee. Secure title sponsor for Shoot-Out. Contact insurers and arrange for coverage.
8 weeks prior	-	Include information on Shoot-Out in all of your golfer mailings.
8 weeks prior	-	Tag P.S.A. and place in the hands of the media.
4 weeks prior	-	Include information on Shoot-Out in Pre-Tournament press releases.
4 weeks prior	-	Arrange interviews on radio and TV for Tournament Chair/Publicity Leader.
4 weeks prior	-	Make arrangements for media to cover the Shoot-Out.
2 weeks prior	-	Arrange for club pro and police officer to be present, or videographer.
2 weeks prior	-	Recruit Shoot-Out volunteers.
Tournament Day	-	Promote heavily at registration and sell chances for Shoot-Out.
Post Tournament	-	Include Shoot-Out results in Post-Tournament press release.

Create a Publicity Leader position within your Tournament Committee. The Publicity Leader is responsible for publicizing the tournament. He/she must work closely with local newspaper, radio, and television personnel to generate as much exposure as possible for the event. This person should supply feature article stories and periodic news releases (guidelines for news releases appear later in this section) before and after the tournament.

The Alumni Cup program provides an excellent media opportunity for your organization. It is absolutely imperative that newspaper, television and radio outlets be contacted and asked to publicize your event <u>even if you do not</u> <u>need additional participants</u>. The sponsors and your charity want to reach more than just the 120 golfers who participate in the tournament. The more publicity you generate this year, the more you have to offer/sell sponsors next year.

For the tournament to succeed, golfers first must be made aware of it, and then be enthusiastic about participating in it. In order to secure advertising, it may be necessary to offer media outlets local sponsorships of the event. This means they will be considered local or "hole" sponsors.

You should also invite local reporters and TV sportscasters to play at no charge in the event. Also, invite a prominent media person to MC the event. This expenditure will increase paid participation and generate significant publicity which is important to your sponsors. You can also conduct a "Media Day" by inviting members of the media to play golf with tournament committee members at the host course prior to the event.

In all advertising, make sure all pertinent information is included. This includes: the location, date, and time of the event; local celebrities who will be participating; and, most importantly, your national sponsors. The national sponsors' names should appear exactly as follows: The Liberty Mutual Insurance Alumni Cup presented by TaylorMade adidas Golf, Sports Vision Eyewear, Golf Digest and All American Classics.

Publicity 4.9

Again, it is very important that you thoroughly publicize the tournament. In the public's eye, perception is reality -- if your tournament is well publicized in the community it will be perceived as a quality event. It is also critical that the national sponsors appear prominently on all materials relating to the event. This includes invitations, programs, flyers, and any other printed material. On all printed materials and correspondence, the national sponsors' names must not be overshadowed by the local sponsor's names.

The Liberty Mutual Alumni Cup Golf Tournament will be one of the most prestigious amateur sporting events in your area. As part of the largest corporately sponsored amateur charity golf event in the world, your tournament will warrant extensive media coverage. Conversely, media coverage is essential if the event is to succeed as a sporting event and fund-raiser. You will find that media personnel, particularly those in sports, will welcome the opportunity to cover the event as well as participate in.

The Liberty Mutual Alumni Cup allows media outlets to be associated with an important charitable cause and its distinguished sponsoring corporations. Thus, coverage will generate public goodwill for each cooperating outlet. Focus on radio and television stations and cable systems in particular. Although these outlets are no longer mandated by law to provide Public Service Announcements to their audiences, they are still receptive to promoting charitable causes.

Use free advertising and PSAs to create significant media coverage.

1. Create an Event Website and a Facebook Page

Develop a website dedicated to your event to promote the tournament and your sponsors. Links for all local tournament websites (and those of the benefiting charities) are included on the national site, <u>www.libertymutualAlumniCup.com</u>. Also create a page on Facebook to promote your event. Link to the program's Facebook page, <u>www.facebook.com/LibertyMutualAlumniCup</u>. Encourage your golfers and other supporters to become Facebook fans of both your local tournament and the national program so that they receive updated information.

Publicity 4.9

As a part of our relationship with Golf Digest and Golf Digest Planner (<u>www.golfdigestplanner.com</u>), Liberty Mutual Alumni Cup events have the opportunity to utilize Golf Digest Planner's online tools to both market and manage your event at significantly discounted rates. The Golf Digest Planner was developed specifically for fundraising golf events. This powerful application is designed to streamline all the tasks involved in planning an event and provide the marketing tools to sell out your sponsorships and player spots. The Golf Digest Planner includes many of the features important to a successful event including:

- You can set up your event in minutes including a custom event website; a Liberty Mutual Alumni Cup template has been developed
- The ability to accept player and sponsor registrations including credit card payments
- E-mail templates to promote your event
- Sponsor logos on the event website for added visibility
- Tools to manage committees and volunteers
- Real-time reporting
- Event day management tools including pairing lists

In addition, we have a complete tournament shop with tournament packages designed to help you raise more money and have a more successful event. This includes discounted products from **TaylorMade adidas Golf, Sports Vision Eyewear, All American Classics, and other great companies.**

There is one-time per event fee to use the Golf Digest Planner. Liberty Mutual Alumni Cup events receive discounted pricing for using the Golf Digest Planner.

To get started, go to <u>www.GolfDigestPlanner.com</u> and click on "Start Planning My Event."

If you have any questions on the planner, please e-mail <u>support@golfdigestplanner.com</u>.

2. <u>Facebook</u>

All Liberty Mutual Insurance Alumni Cup event organizers are invited to create a Facebook group or event page for promoting their tournament within Facebook. Please follow the guidelines listed below when creating your Facebook page.

- Please use your charity's logo as your page's profile picture. Please refrain from using the Liberty Mutual or Liberty Mutual Alumni Cup logo as your page's profile picture.
- You may use "Liberty Mutual Insurance Alumni Cup" in the name of your page or event, but please also include something in the title that identifies the specific charity and event.
- Please do not post any images that you have not taken yourselves unless you have express permission to use the images.
- Please monitor your page for abusive and inappropriate content on a regular basis.
- When your page is created, please send the URL along with your name, the best email to reach you at and the location and date of the event to: corpinteractive@libertymutual.com. Please copy Skip Jenkins (<u>skip@fortune-marketing.com</u>) on this correspondence. This email notification will allow Liberty Mutual to link to your page from the main Liberty Mutual Golf fan page.

Please feel free to link back to the Liberty Mutual Golf Facebook page (<u>www.facebook.com/libertymutualgolf</u>).

3. Utilizing the Media

A pre-event press conference or media event can be a very helpful tool in making the local media familiar with your tournament and your cause. You can also conduct a "Media Day" by inviting members of the local media to play golf with committee members at the host course prior to the tournament. **Another powerful means to ensure coverage is to sign up media outlets as local "hole" sponsors. By associating each outlet with its own promotional presence at the event, you will guarantee coverage.** Ask the Public Service Directors of your local stations for suggestions about obtaining additional publicity.

News releases must be sent to all newspapers, radio and television stations (particularly the media "hole" sponsors) to announce the tournament date and chairpeople. Other releases must be sent on a regular basis updating the progress of the tournament. These should include the number of teams signed up, notable people who have agreed to play, etc.

GET TO KNOW YOUR LOCAL MEDIA REPS!

EXPERIENCE SHOWS THAT IF YOU PROVIDE THESE RELEASES AND PSAS WITH AMPLE LEAD TIME, THESE MEDIA OUTLETS WILL USE THEM !!!

All media outlets must be invited to send a representative to cover the event. A way to guarantee media involvement is to ask a well-known media personality or local celebrity to be Master of Ceremonies of the Awards Banquet or Honorary Chairperson of the event. Furthermore, invite key media personnel to play in the event free of charge. This will insure good coverage as well as boost attendance and attract outsiders.

REMEMBER MEDIA EXPOSURE PROVIDES TREMENDOUS VALUE TO YOUR SPONSORSHIP PACKAGES.

PERCEPTION IS REALITY; IF YOUR EVENT APPEARS TO BE "BIG" IN THE MEDIA, IT WILL BE BIG!

a. Before the Tournament

The Publicity Leader MUST <u>personally</u> contact the sports editors and sports directors of local newspapers, radio stations, and television stations. He or she must seek both their support and prime newspaper space or airtime with which to advertise the tournament. Invite them and their reporters to participate in the tournament, the cocktail party, and the banquet. Bear in mind that the charity aspect of your event makes it newsworthy. Consequently, personal contact MUST also be made with news editors, as well as editors of Calendar, Life Style, Arts & Leisure, and other pertinent sections. Simply sending a new release to these media outlets is not enough -- as with recruiting golfers or local sponsors, personal involvement is needed.

After this initial contact, follow up with a news release announcing the tournament date, location, and chairperson (see the news release tips in this Section 4.9). Additional releases should be sent updating the progress of planning (i.e., notable people who will be playing, number of teams, national and local business involvement, etc.).

b. The Day of the Tournament

If you have a tournament photographer at the event he or she must get both posed and action shots which should be submitted with the news releases. All photographs should be black and white and must be developed immediately if they are to be useful for newspapers. Photographs of the awards ceremony may also be interesting.

c. The Day After the Tournament

On the day following your Liberty Mutual Insurance Alumni Cup Tournament, email a news release announcing the tournament winners who will be going to the National Finals. Prepare your release to meet daily newspaper deadlines and broadcast needs. The media must receive the releases the day after the tournament. If the news releases are not received immediately, the event will have lost its newsworthiness. Photographs should accompany this release. Good publicity is dependent upon good pictures - this event is no exception. Interesting pictures always add to readership.

4. Alternative Media

Promote the Alumni Cup through available alternative media that specifically target golfers.

- a. Contact local community newspapers which can be excellent venues for publicizing the event in your area.
- b. Company newsletters and magazines are effective ways to reach potential participants.
- c. Distribute flyers and/or brochures in golf clubs, sports stores, and men's shops.
- d. Your organization's newsletter provides an excellent opportunity to recruit potential participants both inside and outside your organization.
- e. Contact local or regional golf publications about your event.
- f. Include links on your organization's website promoting the event.
- g. Take advantage of the Liberty Mutual Alumni Cup on the Liberty Mutual Golf Facebook page by posting items promoting your upcoming event.
 Also provide photos to Skip Jenkins or Loren Shapiro to post following your event.

Media publicity is essential for making the Alumni Cup a success. How much coverage you get from your local media depends on:

- a. The quality and timing of your news releases.
- b. The quality and success of your event.
- c. How well you <u>get to know</u> the key decision makers at your local media outlets.

Make your news releases as clear, concise, and as easy to read as possible. A well-written release will have a much better chance of being published and generating coverage.

- a. All correspondence and releases should be on your alumni association's letterhead. Your name and phone number must be included should an editor have any questions.
- b. Use short, concise sentences and short paragraphs.
- c. Liberty Mutual, TaylorMade adidas Golf, Sports Vision Eyewear, Golf Digest should be integrated into the text.
- d. All the essential information on what, where, when, why, and how must be in the first few paragraphs; other material should appear in order of descending importance.
- e. Do not load the release with adjectives on how wonderful the tournament will be or was. Over-embellished releases will be rewritten or may not get printed.
- f. Know the deadline for each media outlet. Make sure the releases arrive as early as possible never just before a deadline.
- g. Your first release must introduce the public to the tournament: what the tournament is, where it will be held, its date, time, place, chairpeople, and any local leaders involved. Include additional background information on the tournament, the charity's history and programs, as well as the hosting golf club. Above all, work in the national sponsors and their contributions.
- h. As plans for the tournament develop and teams sign up, send out one or more releases reporting on the progress.
- i. A short time before the tournament, issue a release that summarizes the progress of the event to that point. Also, remind the public of the date of the event, the number of teams registered, and the participating celebrities.
- j. If local celebrities will be participating, arrange interviews with them for the media. Such initiative this year will make next year's tournament easier.
- k. A post-tournament release must be submitted highlighting the tournament's results as well as background on the club, sponsors, local dignitaries, and tournament history. It should include quotes of the winners and runners-up, the estimated monies raised, celebrity performances, and other pertinent information on the tournament and the banquet. This release must be submitted immediately following the event to ensure proper coverage by the media.

6. Photography

Photographs are essential to a successful publicity program. Good photographs can make the difference between news releases and features getting prominent display or not being used at all. The following guidelines are suggested photography opportunities for the tournament photographer:

- a. A picture of three or four members of the Tournament Committee lined up as though they were about to hit golf balls.
- b. A picture of the first person to tee-off in the tournament, with the tournament chairpersons or club pro as onlookers.
- c. Pictures of the winners and runners-up of the tournament receiving congratulations from the chairperson.
- d. Pictures of Tournament Committee or winners.

Keep in mind that the Liberty Mutual Alumni Cup is not a one time event. Compile an Event Scrapbook that includes photos, brochures, posters, press clippings, etc. to use for the following year's event. This Event Scrapbook will be used to renew previous local sponsors and/or solicit new ones and will facilitate the planning of next year's event. You can also have photographs from your local event posted on the national Liberty Mutual Alumni Cup website and Facebook page. Email the image files to <u>skip@fortune-marketing.com</u>. Other suggestions are outlined below:

- Use only digital cameras for tournament photos.
- Take a lot of pictures to insure that only the highest quality shots are submitted.
- One of the most common errors in taking photographs is shooting too far away from a subject. Get as close as possible. Use a telephoto lens when possible.
- Photograph the tournament from beginning to end: preparations, registration, golf action, refreshment breaks, human interest shots, the Golf Committee, team pictures, winners, runners-up, the awards banquet, etc.
- Posed team pictures are necessary. However, by themselves, they generally are not sufficiently interesting to the media. Newspapers are more apt to publish action pictures.
- When shooting outdoors, beware of dark shadows caused by the midday sun and golf cap visors. When possible, pose groups in the shade in order to avoid sharp shadows. Use a flash if possible to avoid dark faces.
- When shooting indoors, pose groups against a background of contrasting color when possible. Empty spaces behind subjects usually show up black in flash pictures and thus it is best to pose subjects close together.

The golf professional will help set up and conduct the tournament. Do not be intimidated by the pro. Make sure he or she works hard on your Liberty Mutual Alumni Cup event. You are paying for his or her time and efforts. The golf professional's responsibilities include but are not limited to:

- 1. Putting up tee markers and banners.
- 2. Supervising the set-up of an Alumni Cup golf course (e.g., proper overall yardage, spacing of men's and women's tees, minimum distances on hole-in-one holes)
- 3. Placing name and distance markers on the course for "Closest to the Pin", and "Hole-in-One" contests.
- 4. Provide pin sheets.
- 5. Administrate and supervise the running of the tournament. Specifically, facilitate the shotgun starts, produce alpha lists of participants, supervise signage, create cart signs.
- 6. Score and skins game tabulation and tie-breaking.
- 7. Resolve rules and scoring disputes.

On the following page is a Golf Course Set-Up checklist sheet listing what must be discussed with the hosting golf professional. Provide the golf professional with a copy of the Alumni Cup Rules (available at <u>www.libertymutualac.com</u>) well in advance of the event.

It is imperative that the local charity and the hosting club professional work together to ensure a successful tournament. Make sure that the following responsibilities are completed:

- 1. Send out personal invitations to members of host club (see sample in Section 4.6).
- 2. Decide on the tournament schedule such as time for shotgun start (afternoon only), the cocktail party, the banquet, etc.
- 3. Set up the course fairly. Make the course a challenge, not too hard, not too easy. Remember that the competition should be set up to identify the best team. In addition, your golfers are paying a significant amount of money to play in your event. They want to be challenged. As a guideline, try to set up the men's tees at approximately 6,400-6,700 yards and the women's tees at approximately 5,600-6,000 yards. The women's tees should, therefore, be 40-45 yards in front of the men's tees on each hole (other than the hole-in-one holes).
- 4. The golf staff should plan on extra manpower for valet parking, golf bag carriers, a beverage cart, scoreboard, extra carts, Hole-In-One monitors, etc. If the golf course staff is unable to provide the labor for these jobs, be prepared to assign volunteers to complete these necessary tasks.
- 5. Have "Rainout" or "Rain Delay" contingency plans prepared with a makeup date scheduled. Do not go forward with your plans unless you can reach a satisfactory agreement on this point with the host club.
- 6. Prepare for special events such as putting contests, closest to the pin, longest drive, etc. and establish corresponding prizes.
- 7. Prepare pin sheets noting where the flag is exactly positioned on the day of your event.

Day of the Event Set-Up

DAY OF THE EVENT SET-UP

Golf Course Set-Up Checklist 5.1

Golf Course Set-up Checklist

- 1. Shotgun start time: _____PM Number of players: _____ Number of golf carts: _____
- 2. If tables, chairs and measuring tapes are needed (for example for Hole-in-One or Closest-to-the-Pin holes), please give hole number(s) and location(s):

a. Hole #:	Tee:	Green:
b. Hole #:	Tee:	Green:
c. Hole #:	Tee:	Green:
d. Hole #:	Tee:	Green:

- 3. Please indicate hole number for the Closest-to-the-Pin Contest: Hole # _____. Place pop-up sign on the tee.
- 5. The Liberty Mutual Insurance Hole-in-One Hole: This hole must be at least 150 yards long. Liberty Mutual will provide \$10,000 to anyone (which will be split equally with the charity) making a hole-in-one at: Hole # _____. Place pop-up sign on the tee.

6.	Registration area will be set up at	by
	AM. Alumni Cup tablecloth to be used.	
	Number of tables:	
	Number of chairs:	
	Banners:	_

7. The hanging banner will be placed in the following locations:

Registration - Alumni Cup Hanging Banner:_____

Dinner - Alumni Cup Hanging Banner:_____

Suggested placements for the hanging banners include the registration area, the area where the golfers get their carts, high traffic areas around the clubhouse such as near the 1st tee and the 18th green, the luncheon room and, after the players begin play, the banquet room.

1. On-Site Signage

As an Alumni Cup event, you will be receiving on-site signage that will make your event look like a professional run tournament and this desired look is not lost on the golfers. The Tournament Coordinator will be responsible for all on-site signs including tablecloths, banners, and tee markers. The golf professional and his staff should assist you and your staff with this job. It is imperative that the golf professional and his staff clearly understand your needs as they are likely be different than those of other events hosted by the club.

All Liberty Mutual Alumni Cup will receive the following items

- 1. Tablecloth for the registration table
- 2. Hanging Banners for the registration area and for the Lunch and Awards Banquet rooms
- 3. Tablecloth for the gift/prize tables
- 4. Tee Markers

Below please find recommended locations and set-up instructions for each of the on-site signage pieces:

A. <u>Liberty Mutual Insurance Alumni Cup Tablecloth</u>. You will receive one Alumni Cup Tablecloth. This tablecloth should be used at the center of your registration area. Most registration area will have two or three 8 foot banquet tables so that players can check-in, buy raffles tickets, enter a Skins game, etc. These tables should be dressed and skirted by the Host Club. The tablecloth should be draped over the first or center table, whichever is more pleasing to the eye.



- B. <u>Hanging Banners</u>. You will receive two (2) Liberty Mutual Insurance Alumni Cup logoed banners. These banners must be displayed at each tournament. All of these banners must be used for all future events that you conduct, and therefore, must be taken down and stored carefully after each event. Alumni Cup banners should be displayed in the following highly visible areas:
 - i. Behind the podium and the prizes at the awards banquet.
 - ii. Behind the registration table where you welcome your participants.
 - iii. In the golf course club house.

Before the Golfers Arrive 5.2

- iv. Hanging off a clubhouse railing so that players can see the banners as they approach the 18th green.
- v. At the concession stand, bar or coffee shop on the course.
- vi. At the Liberty Mutual Insurance sponsored Hole-in-One hole.



Before the Golfers Arrive 5.2

D. Tee Markers. You will receive 40 tee markers for your event. They will come in 2 cartons of 20 pieces each. These tee markers require no assembly and only need to be place in the correct spots on the golf course. They are, appropriately, blue, like the blue championship tees at each golf course. You or the Professionals staff should place two (2) Alumni Cup tee markers on each tee box (men's tees). Video showing how the tee markers should be positioned can be found at www.libertymutualac.com, the user id is tepel and the password is golfpro. The tee markers are cylindrical in shape and are designed to be place directly over the blue tee markers on the golf course. This way there will be no confusion as to where the golfers should play from. Tee markers are not hole sponsorship signs. Just as we provide exclusive, first rate product and service to our national sponsors you will want to do the same for your local sponsors. It is in your financial interest to obtain hole signage independent of the tee markers, banners or other pre-printed materials a local sponsor was arbitrarily added. We do not want to create a situation that might suggest to your local sponsor that their commitment was not worthy of its own recognition.



will be available for your event



2. Table Set-Up

Make sure food and beverage and set up details on the following pages are discussed and agreed upon with your contact at the banquet facility so that no last minute problems arise. Also, make sure you have enough staff and volunteers to properly man the registration table, hand out gifts, and set up the various required tables described below:

- A. **Registration Table** Use some kind of Tournament Registration Form (a downloadable form is available on our download website) for day of the event registration and display the raffle prize. Require ALL of your golfers to complete the Tournament Registration Forms fully. Inform them that by completing the Tournament Registration Form they will start receiving their complimentary subscription to Golf Digest
- B. **Golfer Gift Table** Liberty Mutual Alumni Cup backpacks hats, and sleeves of TaylorMade golf balls should be handed out by a volunteer at a separate table next to the registration table
- C. **Prize Table** Display of the team prizes as well as display of "Closest to the Pin" prizes. These prizes should be displayed on a separate table. This way, golfers will know what they are competing for.



⊳

Framed Raffle Prize Photo

⊳

Registration & Completion of Forms Raffle Ticket Sales

⊳

Gift Items

Liberty Mutual Insurance Alumni Cup

SCRAMBLE FORMAT

- 1. All players to play at SCRATCH. No handicap strokes will be counted until following the round. Handicap will be applied to your final score by the Golf Professional.
- 2. All players hit one tee shot on every hole. EACH player's tee shot must be used at least 2 times.
- 3. Choose the best drive and have all players hit their next shot from that spot (within one (1) club length), no nearer to the hole.
- 4. This sequence is continued until the ball is holed out. Once a ball is holed, the hole is over.
- 5. Record one score for the team.

RULES OF PLAY

- 1. EACH of four player's tee shot must be used at least two (2) times.
- 2. Play <u>all</u> balls "UP". You may rake sand traps between shots.
- 3. USGA Rules, except as modified by local rules, will apply, including the 14 club rule. The penalty for breach of the 14 club rule is disqualification.
- 4. All ties are to be determined by the Host PGA Professional who will match scorecards beginning with the <u>Men's #1 Handicap Hole</u>.
- 5. Decisions by the Pro and Tournament Committee are final and not subject to appeal. All handicap disputes shall be resolved through arbitration with the USGA or the governing state golf association.

In fairness to the other teams, **please**:

REPLACE ALL DIVOTS * REPAIR BALL MARKS ON GREENS * RAKE SAND TRAPS * KEEPS CARTS ON PATH

Hole # _____ is a HOLE-IN-ONE hole, the prize is a trip to St. Andrews, Scotland, compliments of the Old Course Experience.

Hole # _____ is a CLOSEST-TO-THE-PIN hole, the prize is a pair of Sports Vision Eyewear sunglasses.

1st PLACE PRIZES -. A TaylorMade SLDR Driver, and a Liberty Mutual Insurance Alumni Cup championship trophy.

2nd PLACE PRIZES – Liberty Mutual Insurance Alumni Cup logoed Leather and Fabric Duffel.

3nd PLACE PRIZES – One TaylorMade golf bag

4th PLACE PRIZES – One pair of Sports Vision Eyewear titanium sunglasses.





Golf Hat



TaylorMade Distance Golf Balls

5.6



1680D Nylon Computer Backpack

Divot Tool



One Year Golf Digest Subscription

LIBERTY MUTUAL ALUMNI CUP TOURNAMENT OPERATIONS MANUAL

Golfer Gifts and Prizes 5.6





and All American Classics University Logoed Trophy



2nd Place: Leather/Fabric Duffel Bag



4th Place: Sports Vision Eyewear titanium sunglasses

3rd Place: TaylorMade Golf Bag



While the Golfers are Playing

Your golfers will be on the golf course for at least five hours. With the exception of staffing a putting contest on the practice green, the competition will proceed without need for your manpower. Take this time to completely set up the banquet room and prepare for the awards ceremony, raffle, auction, etc. Banners and tablecloths used at your registration area must be moved to your banquet room. The prize display table must also be moved to the banquet room. During this time, please confirm with the food and beverage/club manager that all arrangements are in place for the awards dinner. Also please confirm that the golf professional has prepared the scoring sheets and has sufficient staff ready to conduct the scoring after the round.

After the Round

1. The Awards Banquet

Note: Prior to the awards banquet, we recommend a cocktail party of no more than one (1) hour.

A. The awards banquet should consist of a plated sit-down dinner for each golfer.

B. Set up banners and prizes well in advance of the banquet. All set up should be done out of the sight of the golfers, while they are on the golf course.

C. A podium is necessary for the awards ceremony.

D. After the scoring has been completed out of the public view, ask the hosting golf pro to post the score sheets so that the winners' scores, as well as all the participants' scores are on display.

2. Awards and Prizes

Someone from Liberty Mutual may wish to say a few words. On the following page is an example of their remarks.

Following that is the Awarding of Prizes script for the Master of Ceremonies to read when awarding prizes. It is very important that the MC read this script in its entirety to the audience. It can be expanded to include any other comments that are deemed appropriate.

It is very important that the local charity thank Liberty Mutual, TaylorMade adidas, Sports Vision Eyewear, Golf Digest, and All American Classics at this time. These sponsors donated the prizes which will be awarded to the winners, and thus deserve mention and thanks when their prizes are awarded

Sponsor & Master of Ceremonies Scripts 5.8

Good evening. I am [name] from Liberty Mutual Insurance. First, I'd like to thank everyone at [Alumni Association]. Their staff and volunteers have put on a wonderful event and, on behalf of Liberty Mutual, we're proud to be associated with [Alumni Association] and help them in the work they do.

Secondly, I'd like to thank [course] and their staff for hosting all of us and enabling us to enjoy a wonderful day of golf.

Finally, I'd like to thank all of you for supporting this great cause. Liberty Mutual's corporate mission reads, "We help people lead safer, more secure lives." This event allows us to demonstrate our commitment and responsibility to this mission and your participation here today illustrates that each of you is similarly committed to helping others.

Please have a great time and enjoy the rest of your evening. There are still some exciting prizes to be awarded. Again, thank you, and we at Liberty Mutual Insurance look forward to seeing you again next year.

The names of the Tournament's winners should be filled in the appropriate spaces on this sheet.

MASTER OF CEREMONIES SCRIPT - AWARDING OF PRIZES

The (Alumni Association Name) would like to thank you, the golfers, for making this event, part of the Liberty Mutual Insurance Alumni Cup, a huge success.

We would also like to thank Liberty Mutual Insurance Company for making the Alumni Cup tournaments possible.

Also making these tournaments possible are the following national presenting sponsors: TaylorMade adidas Golf, Polaroid, Sports Vision Eyewear, Golf Digest and All American Classics. We would also like to thank our local sponsors such as: ______

Awarding of the Closest-to-the-Pin Prize

The winner of the Closest-to-the-Pin Contest on hole # ___ in today's tournament will receive a pair of Sports Vision Eyewear titanium sunglasses. He/she is

Awarding of 4th Place Prizes

The members of the fourth place team will each receive a pair of Sports Vision Eyewear titanium sunglasses. Congratulations to the team of

and

Awarding of 3rd Place Prizes

The Members of the third place team will each receive a TaylorMade golf bag.. Congratulations to the team of ______, and _____,

Awarding of 2nd Place Prizes

Each of the members of the second place team will receive a Liberty Mutual Insurance Alumni Cup Leather and Canvas Duffel Bag. Congratulations to the team of: ______, _____, _____,

____.

DAY OF THE EVENT SET-UP

Sponsor & Master of Ceremonies Scripts 5.8

Awarding of 1st Place Prizes

The members of the winning place team will each receive a TaylorMade Driver and a commemorative framed trophy, courtesy of All American Classics. Congratulations to the team of______,

and

Closing Remarks

Again, the (Alumni Association Name) would like to thank all the participants in today tournament, a part of the Liberty Mutual Insurance Alumni Cup. Without you there would be no tournament. Your contributions will help (insert cause).

The (Alumni Association Name) also thanks Liberty Mutual Insurance, TaylorMade adidas Golf, Sports Vision Eyewear, Golf Digest, and All American Classics for making these tournaments possible both here locally and in many other cities across the United States. An Excel database of all of the Liberty Mutual Insurance Alumni Cup participants which include name, address, phone, and email address must be sent to Skip Jenkins (<u>skip@fortune-marketing.com</u>) immediately following the event. Together with this Excel file, please include a list of your tournaments winners with all of their contact and handicap information and your full tournament results so that it can be posted to the Liberty Mutual Golf Facebook page.

Please be sure to email photographs (the more you can send the better) to Skip Jenkins as soon as possible following your event, hopefully by the next day. These photos will be posted on the Liberty Mutual Golf Facebook page, <u>www.facebook.com/libertymutualgolf</u>. These photos are an important part of the ongoing promotion of your tournament, your organization and the national program.

PLEASE RETAIN ALL OF YOUR SIGNAGE: THE TEE MARKERS, THE HANGING BANNERS, AND THE TABLECLOTHS.

THESE ARE NOT DISPOSABLE!

You may be contacted following your event to ship one or more of these items to another charity conducting a Liberty Mutual Alumni Cup event. Any shipments will NOT be at your expense, you will be provided with a prepaid FedEx shipping label. DAY OF THE EVENT SET-UP

Appendices

APPENDICES

NOTE: In contracts with the host golf clubs, try to avoid committing to a minimum number of dinners and/or greens fees. If the club absolutely insists on such a commitment attempt to negotiate it down as low as possible. A number of events have lost significant revenues through not reaching their contractual minimums.

TOURNAMENT AGREEMENT

The purpose of this letter is to set forth an agreement between

______, a not-for-profit charitable organization operating in the state of _______ (hereinafter referred to as "Association") and _______ (hereinafter referred to as "Club") with regard to golf course availability and use during the "Liberty Mutual Insurance Alumni Cup" (hereinafter referred to as "Tournament") to benefit the Association.

Whereas, the Association conducts the "Liberty Mutual Insurance Alumni Cup" for the benefit of the Association and its programs, and;

Whereas, the Club owns, maintains and operates the golfing facility in ______;

Therefore, the parties herein agree to the following:

- 1. The fees for the Tournament paid to the Club by the Association shall be \$
 _____ per golf participant. Said fee of \$_____ per golf participant
 will be the only golf related financial commitment for the use of the golf
 course and golf related services at the Club.
- 2. The Club shall provide two (2) motorized golf carts per foursome.
- 3. The Tournament will be played on ______, 201_. The Tournament will begin at _____ p.m. with a "shotgun start" (i.e., tournament play will begin simultaneously on all holes of the tournament course).
- 4. The format of play for the Tournament will be "scramble style". Tournament participants will be grouped into foursomes containing four amateur golfers.
- 5. The Charity currently estimates that the tournament will have between 80 and 144 participants. The Association agrees to provide to the Club, by telephone, a more accurate estimate of the actual number of Tournament participants on ______, 201_, and again on ______, 201_.

- 6. In the event the Association shall in good faith determine that the tournament cannot be played at its designated time due to inclement weather, or the golfers fail to complete ____ holes, or in the event that the Club shall close the course scheduled for the event for any reason whatsoever during the hours designated for the Tournament, or in the event the tournament course shall be unplayable for any reason during the hours scheduled for the Tournament shall be rescheduled for _____, 201_.
- 7. The Association Committee will provide to the Club a listing of Tournament pairings on ______, 201_, reflecting all confirmed participants as of that date and will notify the Club of all additions or deletions, by telephone, by ______.m. on the Tournament day.
- 8. The Association will be permitted to maintain one (1) refreshment stand on the Tournament course, during the Tournament, for the enjoyment of the Tournament participants and spectators. The Club will have no obligation to provide any services or refreshments for this stand and likewise will receive no fees or profit from its operation.
- 9. The Association shall be permitted to post "sponsor banners" on all 18 holes of the Tournament course. Additionally, banners will be posted in the parking lot, the scoreboard area, the putting green, the clubhouse, concession stand and banquet room.
- 10. The Club agrees to provide to the Association the use of all of its facilities including, but not limited to, the golf course, carts, clubhouse, banquet facilities, etc. on _____, 201_.
- 11. The Club agrees to provide various registration table(s) to be ready for use by the Association four (4) hours prior to the beginning of the Tournament.
- 12. It is further agreed that the Association and the Club have agreed upon the handicapping system of the "Liberty Mutual Alumni Cup" and that the Club and the hosting Pro will assist in the pairing of foursomes, final scoring, including the provision of a scoreboard.
- 13. It is further understood that the Club will have the banquet facility set up for the Alumni Cup awards banquet for use by the Association immediately upon completion of the golfing event. The set up will include, but not be limited to; chairs and tables for at least 150 people and sponsor banners. The Club will be responsible for providing sufficient china tableware, silverware, napkins and tablecloths for the entire evening. The Club will set up two locations within the aforementioned area to be used by the Association as bars. Napkins, glasses, ice and stirrers will be provided by the Club. Bartenders and donated beverages of all types will be provided by the Association.

Sample Tournament Agreement 6.1

- 15. The Association agrees to pay the club \$ _____ for each participant in attendance at the awards banquet to cover banquet costs.
- 16. The Club will furnish and set up a podium and sound system for use by the Association.
- 17. It is the intent and understanding of the parties that nothing in this agreement between the Association and the Club shall be deemed to represent an agreement between any of the sponsors of the event and the club.

If the foregoing accurately sets forth our understanding, please execute this letter and its attachment in the space provided below. An additional copy of this letter is enclosed for your files.

Yours very truly,

(Association Name)

by: _____

Accepted and Agreed:

by:

(The Hosting Club)

by:____

Club Professional

by:

Food and Beverage Director

APPENDICES

USGA Rules of Amateur Status 6.2

Any person who considers that any action he is proposing to take might endanger his amateur status should submit particulars to the United States Golf Association for consideration. Below are the most relevant sections of the USGA's Amateur Status Rules. You can review the full set of rules at

http://www.usga.org/playing/amateur_status/books/rules_amateur_status.html.

Definitions

An "amateur golfer," whether he plays competitively or recreationally, is one who plays golf for the challenge it presents, not as a profession and not for financial gain.

Rule 3 Prizes

3-1. Playing for Prize Money

An *amateur golfer* must not play golf for prize money or its equivalent in a match, competition or exhibition.

However, an *amateur golfer* may participate in a golf match, competition or exhibition where prize money or its equivalent is offered, provided that prior to participation he waives his right to accept prize money in that event.

Exception: Where prize money is offered for a hole-in-one made while playing a round of golf, an *amateur golfer* is not required to waive his right to accept that prize money prior to participation (see Rule 3-2b).

(Conduct contrary to the purpose and spirit of the Rules - see Rule 7-2.)

(Policy on Gambling — see Appendix.)

3-2. Prize Limits

a. General

An *amateur golfer* must not accept a prize (other than a *symbolic prize*) or *prize voucher* of *retail value* in excess of \$750 or the equivalent, or such a lesser figure as may be decided by the *Governing Body*. This limit applies to the total prizes or *prize vouchers* received by an *amateur golfer* in any one competition or series of competitions.

Exception: Hole-in-one prizes – see Rule 3-2b.

Note 1: The prize limits apply to any form of golf competition, whether on a golf course, driving range or golf simulator, including nearest the hole and longest drive competitions.

Note 2: The responsibility to prove the *retail value* of a particular prize rests with the Committee in charge of the competition.

Note 3: It is recommended that the total value of prizes in a gross competition, or each division of a handicap competition, should not exceed twice the prescribed limit in an 18-hole competition, three times in a 36-hole competition, five times in a 54-hole competition and six times in a 72-hole competition.

b. Hole-in-one Prizes

An amateur golfer may accept a prize in excess of the limit in Rule 3-2a, including a cash prize, for a hole-in-one made while playing a round of golf.

Note: The hole-in-one must be made during a round of golf and be incidental to that round. Separate multiple-entry contests, contests conducted other than on a golf course (e.g., on a driving range or golf simulator) and putting contests do not qualify under this provision and are subject to the restrictions and limits in Rules 3-1 and 3-2a.

3-3. Testimonial Awards

a. General

An *amateur golfer* must not accept a *testimonial award* of *retail value* in excess of the limits prescribed in Rule 3-2.

b. Multiple Awards

An *amateur golfer* may accept more than one *testimonial award* from different donors, even though their total *retail value* exceeds the prescribed limit, provided they are not presented so as to evade the limit for a single award.

Rule 4 Expenses

4-1. General

Except as provided in the Rules, an *amateur golfer* must not accept expenses, in money or otherwise, from any source to play in a golf competition or exhibition.

4-2. Receipt of Competition Expenses

An *amateur golfer* may receive reasonable competition expenses, not exceeding the actual expenses incurred, to play in a golf competition or exhibition as prescribed in clauses a-g of this Rule.

a. Family Support

An *amateur golfer* may receive expenses from a member of his family or a legal guardian.

USGA Rules of Amateur Status 6.2

* * *

b. Team Events

An amateur golfer may receive expenses when he is representing:

- his country,
- his regional, state or county golf union or association,
- his golf club,
- his business or industry, or
- a similar body

in a team competition, practice session or training camp.

Note 1: A "similar body" includes a recognized educational institution or military service.

Note 2: Unless otherwise stated, the expenses must be paid by the body that the *amateur golfer* is representing or the body controlling golf in the country in which he is competing.

4-4. Maximum of 14 Clubs

a. Selection and Addition of Clubs

The player must not start a <u>stipulated round</u> with more than 14 clubs. He is limited to the clubs thus selected for that round, except that if he started with fewer than 14 clubs, he may add any number, provided his total number does not exceed 14.

The addition of a club or clubs must not unduly delay play (Rule <u>6-7</u>) and the player must not add or borrow any club selected for play by any other person playing on the <u>course</u>.

b. Partners May Share Clubs

<u>Partners</u> may share clubs, provided that the total number of clubs carried by the <u>Partners</u> so sharing does not exceed 14.

Penalty For Breach Of Rule 4-4a or b, Regardless Of Number Of Excess Clubs Carried in a Liberty Mutual Alumni Cuptournament: Disqualification.

c. Excess Club Declared Out of Play

Any club or clubs carried or used in breach of Rule <u>4-3a(iii)</u> or Rule <u>4-4</u> must be declared out of play by the player to his opponent in match play or his <u>marker</u> or a <u>fellow-competitor</u> in stroke play immediately upon discovery that a breach has occurred. The player must not use the club or clubs for the remainder of the <u>stipulated round</u>.

Penalty For Breach Of Rule 4-4c: Disqualification.

In order to obtain a <u>Handicap Index</u>, a player must join a <u>golf club</u> and post <u>adjusted gross scores</u>. These scores are subject to <u>peer review</u>. After at least five scores have been posted, the club will be eligible to issue a <u>Handicap Index</u> to the player in accordance with the <u>USGA Handicap System</u>.

3-2. Using a Handicap Index

3-1. Obtaining a Handicap Index

A <u>Handicap Index</u>, issued by a *golf club*, is a number that represents the potential ability of a player on a course with a <u>Slope Rating</u> of 113. The <u>Handicap Index</u> is updated and reissued at established revision dates set by <u>authorized golf</u> <u>associations</u>. A player is responsible for knowing the <u>Handicap Index</u> issued to the player.

The local Tournament Committee or Chairman may provide **golfers who do not have a USGA Handicap Index** with a Liberty Mutual Alumni Cup Handicap Index that may be used for the tournament. The Liberty Mutual Alumni Cup Handicap Index will be determined in accordance with the **USGA's "Second Best Handicap" system** as follows: To create a player's Second Best Handicap, the Tournament Committee simply asks each un-handicapped player to submit his/her three best scores made on a regulation course (one with par of 68 or more) in the last 12 months. <u>The scorecards from these rounds must be attested</u> to (i.e. signed) by the golf professional. The player's Second Best Handicap is the second best score he/she has given you minus 70 for men or 73 for women. For example, if a male player submits scores of 92, 96 and 98, his Second Best Handicap would be 96 (second best score) minus 70 (for men). Thus, his Liberty Mutual Insurance Alumni Cup Handicap Index would be 26.0. Amateur women golfers are encouraged to play in the Alumni Cup. Women can play with the golfers of their choice in mixed or single sex teams.

- Q? Why would golfers want to play in my tournament when there are "90 other golf tournaments in my city this summer"?
- A: Planned properly, the Liberty Mutual Insurance Alumni Cup is, quite simply, the best Alumni tournament in the area. No other amateur golf tournament combines the excellent prizes, prestigious sites, and charitable fund-raising like the Alumni Cup does.
- Q? My tournament doesn't attract enough golfers, what can I do?
- A: It's not really what <u>you</u> can do as much as it is what your committee can do. The key to filling your field is to have a large, active committee. A proven formula for success is to create an 18-member committee and have each member recruit two foursomes and one hole sponsor. In addition, to having an effective committee, you should heavily publicize your event. Make sure you have gotten the local media involved. Get a local celebrity to serve as a co-chairperson. Get your Public Service Announcements placed on local television and radio stations.
- Q? I keep hearing about other Alumni Association tournaments which make a lot more money than mine does. I know my market won't support an increased entry fee so what should I do?
- A: Recruit a larger, more qualified committee. There is a direct, proven correlation between committee size and income. In addition, this manual contains a rather lengthy section entitled "Generating Income Beyond Entry Fees." Undoubtedly, many of the ideas set forth in that section (all of which have been used by events in the past) will help you raise more money. In addition, the recruitment of local sponsors has proven to be an effective way of significantly boosting your income.
- Q? What should we do if our tournament gets rained out? What if we play 5 holes? Nine holes?
- A: Your contract with the golf course should provide for a rain date. If your event gets rained out you reschedule your tournament for the agreed upon rain date. How you should handle a rain-out needs to be addressed very specifically in your contract with the golf course. Generally, your contract should provide that you get to fully replay the tournament if you play 5 holes or less as a result of inclement weather. Whether you have the same result if you play 7 or 9 or 12 holes depends on your negotiation of the contact.

- Q? Can we play a 9-hole tournament?
- A: If a portion of your round is rained out, but you get enough holes in so that you do not qualify for a rain date, you can play a tournament after only completing 9 holes (or any number greater than your agreed upon cut-off for a rain date). The pro needs to be in charge of the scoring in this situation because it can become quite complicated. Remember all scoring and rules decisions by the pro are final. The pro should determine a winner based on which team is the most strokes under par after however many holes have been completed. Each team must have played the same number of holes. If the teams have not played the same number of holes, compare scores based on the team which played the fewest holes. For example, if some teams have completed nine holes and some have completed ten holes, disregard the tenth hole played by each team which got that far. Ties are likely so the pro will have to match cards. This will be difficult as the tied teams will have played different holes. Begin to match cards based on the lowest handicap hole each team played and continue until you have a winner or you run out of common holes. If you run out of common holes, match cards beginning with the lowest remaining handicap holes. When matching cards with scores from different holes, you must compare the team's scores relative to par. For example, if Team A makes a 4 on a par 5 hole and Team B makes a 4 on a par 4 hole, Team A wins.
- Q? How do I get a Public Service Announcement on the air?
- A: Contact as many local television and radio stations as possible. Also contact your local cable system. Many stations set aside air time for Public Service Announcements. Also, involving local media personalities in your event increases your ability to get your PSA aired.
- Q? My local television station says that a PSA just promotion the scholarship fund for my Association is too commercial. What should I do?
- A: Invite the station to become a media sponsor of the event and incorporate the station's logo or call letters into the PSA.

Answers to Frequently Asked Questions 6.5

- Q? The phone company wants to give every golfer in my event a gift pack, should I accept it?
- A: You may accept the phone company's gift pack, even if it includes golf balls from a competitor of TaylorMade. Our current agreement with TaylorMade adidas Golf allows for competitive products in the golf category.
- Q? If I run a \$1,000,000 Shoot-out, which hole-in-one insurance company should I use and what do I do if they offer me free prizes for other holes-inone?
- A: Quite simply, you should use whichever insurer gives you the best deal (a recommended insurer can be found in Section 4.8 of this manual -- shop around for the best price). If the insurer offers you additional prizes you must make sure that they do not conflict with our sponsors' product exclusivity before accepting the additional prizes and using them in your event.
- Q? The golfers don't like it when we ask for photo identification at registration. Do we really have to do this?
- A: Yes. Unfortunately, not all golfers are as honest as we would like them to be. Other golf tournaments have had problems in recent years with golfers claiming to be someone else. Most of your golfers will be glad that you have taken this extra step to maintain the integrity of the competition. Inevitably, however, some will feel put out by the request to see identification. The best you can do is explain the rationale for this procedure and stress that it is being done to ensure a fair tournament.
- Q? What is the difference between a "home course handicap" and a "USGA Handicap Index" and does it really matter which one we use?
- A: The USGA Handicap Index is an objective number which reflects a golfer's ability regardless of where he/she is playing. The "home course handicap" represents the golfer's USGA Handicap Index as it has been adjusted for use at the golfer's home course. As the difficulty of golf courses vary widely, two golfers with the same USGA Handicap Index may have vastly different home course handicaps. This difference is based solely on the difficulty of each golfer's home course and not on any difference in their ability. Accordingly, it is not an equitable method of comparing golfers and thus it is very important that the USGA Handicap Index is the number used in determining whether each team complies with the event' handicap requirements. An easy way to differentiate the USGA Handicap Index from the Home Course Handicap on golfer's handicap card is that the USGA Handicap Index contains a decimal point and the Home Course Handicap does not.

- Q? A team registers to play and two of the golfers provide handicaps which end with a decimal point. The other two golfers' handicaps do not end with a decimal point. Is this a problem?
- A: No. If a golfer provides you with a handicap that does not contain a decimal point it is a red flag that he/she is mistakenly using their home course handicap rather than their USGA Handicap Index. It is possible for these numbers to vary significantly so you should double check that you have been provided with the correct figure. However, the only handicap you need is the handicap for the team's best player. Make sure to get that player's handicap index.
- Q? One of the golfers in my tournament claims his handicap is not what his USGA card indicates. What should the committee do?
- A: Use the GHIN number on the handicap card to confirm his USGA Handicap Index with the state golf association. Most state golf associations are very willing to verify handicaps, particularly for charity tournaments. In addition, if you have a GHIN number you can verify handicaps online at <u>www.ghin.com</u>. If you are at the golf course without internet access, you can contact Loren Shapiro or Skip Jenkins at (781) 440-6616 and one of them will look up the golfer's USGA Handicap Index online.
- Q? One of my golfers does not have a USGA Handicap Index. Can I give him a handicap for the tournament or tell him how to get a real one?
- A: You should first call the golfer's home course to confirm that this is, in fact, true. The Liberty Mutual Insurance Alumni Cup follows the USGA recommendation of providing competitors without official USGA Handicap Indexes with a "second best" handicap. The procedures for determining a golfer's second best handicap can be found in Section 2.2 of this manual. If possible, you should try to avoid having to use second best handicap. Index, you should urge him/her to try to obtain one before the tournament date. To obtain a USGA Handicap Index the golfer should call your state golf association. The handicapping process does vary slightly from state to state but should never take longer than 30 days.
- Q? What can I do to avoid eliminate cheating at my tournament?
- A: 1.) Before your event each golfer's USGA Handicap Index must be verified to insure that the Liberty Mutual Insurance Alumni Cup Handicap Index requirements are met. Be sure to get copies of your golfers' Handicap Index Cards.
 - 2.) Check each golfer's photo identification at on-site registration.
 - 3.) Place a volunteer scorer with each team; or play in eight-somes -two teams play together and keep each others score.

Answers to Frequently Asked Questions 6.5

- Q? Where can I get 36 volunteers to serve as scorers for my tournament?
- A? Local golf associations or clubs, retirement groups, friends of the Liberty Mutual Insurance Alumni Cup golfers, junior golf programs, high school golf teams, civic groups, the Telephone Pioneers of America, volunteer groups from professional golf events in your area, transplant recipients, employees of your local sponsors, etc.
- Q? I can sell all of the spots in my tournament; do I have to let the national sponsors play?
- A: Yes.
- Q? As title sponsor, what does Liberty Mutual Insurance provide my event?
- A: For a complete list of what Liberty Mutual Insurance provides to each event, turn to Section 3.9.
- Q. The same team has wins my event every year and it is hurting my attendance. What should I do?
- A: Never lose sight of the fact that the Liberty Mutual Alumni Cup is a fundraising "INVITATIONAL" tournament. You can, as a last resort, refuse to allow a team to participate. A better way to address this problem is to request that the team split up into two teams or reconfigure itself through substitutions. As supporters of your charity these golfers should understand that they are harming your fund raising efforts.
- Q? A player from one of the teams in my event cancelled at the last minute. Can I let the other three golfers play as a threesome?
- A: This is up to your local tournament rules. If you are following our recommended rules, the remaining three players can play but they cannot compete for team prizes. They can win individual prizes (Closest-to-the-Pin, Hole-in-One). Before they tee off, you need to make the players aware that they are not eligible to win the event or the team prizes.

- Q? When and how should I set up the player registration tables and awards banquet?
- A: All set up should take place out of the sight of your golfers. It is very unprofessional for the golfers or the event's sponsors to see you setting up. Having your golfers or sponsors arrive at the tournament while you are still setting up is akin to having a contributor arrive for a meeting while you are still putting on your tie or your make-up. Appearances are very important in determining the perception of the quality of your event. Be prepared and get to the golf course early to set up registration, the hanging banners, and the golf course itself. Prepare the banquet room while the golfers are on the course. If your tournament looks great at all times, the golfers and sponsors will be impressed and they will want to be involved again next year. Specific guidelines for setting up each stage of the event can be found in the Section of this manual entitled "Planning a Liberty Mutual Insurance Alumni Cup".
- Q? What should the Emcee say and how can I make sure he/she remembers all of the national sponsors?
- A: The manual provides you with a prepared script for the Emcee. This script, which can be found in Section 5.8, contains everything the Emcee must say at the awards banquet. You can supplement this script with remarks that are appropriate for your specific event.
- Q? The team with the lowest score got disqualified for misrepresenting their handicaps. What do I do?
- A: If a team with the lowest score is disqualified, the team with the second lowest score becomes the winner and should receive the first place prizes. You should not award the first place prizes until you are satisfied that the winning team's handicaps conform to the rules. This will save everyone a great deal of embarrassment.
- Q? Can pros compete in the event?
- A: No, pros, including those employed by golf courses and golf clubs, cannot compete. Pros may participate, however, by playing alongside the four-person teams. Like celebrities, pros must play their own ball. You can set up a separate competition for the pros based on their individual scores.

Answers to Frequently Asked Questions 6.5

- Q? Can celebrities play with the four-person teams?
- A: Yes. The celebrity can play as part of the team or can play his/her own ball in a separate celebrity competition. The celebrities may compete against each other individually.
- Q? My tournament has a two-way tie for first place. The two teams agreed with each other to have a play-off on the golf course. My tournament committee thinks that there is enough light left for the play-off, but I thought the rule said that all ties should be broken by matching cards starting with the Men's #1 handicap hole. What should I do?
- A: You must have the golf pro break the tie by matching cards beginning with the first handicap hole. In no event can you allow the teams to play-off. Your cocktail hour and awards banquet have been planned based on an 18-hole competition. A play-off will throw off the scheduling of your banquet and the planned fund-raising activities.
- Q? I met with the host golf professional and he told me that he was going to set up the course at about 6,000 yards because that's how he always sets up charity events and play will be too slow if the course is set up longer. Should I let him set the course up just like he always does?
- A: No, you deserve individual treatment from your golf pro. You are paying a lot of money; the pro works for you. Don't be intimidated and settle for what "everybody else does." Our events should stand out as superior, not blend in as one of a vast number of indistinguishable tournaments. Set the golf course at an enjoyable yet challenging length. Also, bear in mind that the purpose of any competition is to identify the best team. As a general rule, the men's tees should be set at 6,400-6,700 yards and the women's tees at 5,400-6,000 yards. Pace of play is an issue only to the extent that it affects the timing of the functions following golf or to the extent that it detracts from your golfers' enjoyment of the event. The course has been closed for your use; you are not holding anyone up by setting up a challenging course.

IF YOU HAVE ANY OTHER QUESTIONS, OR IF YOU DO NOT UNDERSTAND THE ANSWERS GIVEN ABOVE, PLEASE CONTACT FORTUNE MARKETING UNLIMITED.