Invitational®
APPLIED UNDERWRITERS

Whistling Straits – Irish Course

Tournament Operations Manual

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Whistling Straits – Irish Course

About The Applied Underwriters Invitational

The Applied Invitational is a national series of amateur golf events, where each individual event benefits a local charity. The national presenting sponsors of the Applied Invitational are Cobra PUMA Golf, Bridgestone Golf, Bass Pro Shops, Under Armour Eyewear, The Experience St Andrews, and Whistling Straits, making it the largest corporately-sponsored amateur charity golf event in the world.

Applied Invitational events are held throughout the country. Winners of local events will be invited to compete in the Applied Underwriters Invitational National Finals to be held at Whistling Straits. Invitational events are generally four-person scramble tournaments, allowing golfers of all skill levels to participate in a competitive and fun event. Each team must be made up of amateurs with a combined USGA Handicap of at least 43.0. Only one player per team may have a USGA Handicap at 8.0 or below. This is the format at the National Finals and is strongly recommended—but not strictly required—for all local events.

The scramble format and handicap requirements make the Applied Invitational much more than just another amateur golf tournament. It is also a pleasant social event for participants and a benefit for necessary and worthwhile causes.

The national sponsors have committed to sponsor the best events available. At the start of each year, Fortune Marketing Unlimited will determine which golf events will be included in the program. Both existing and proposed new events will be considered.

The goal of the Applied Invitational is to distinguish the participating charity and sponsors as participants in the highest-quality amateur charity golf event. This Operations Manual provides the guidelines to conduct a successful event that will satisfy not only your financial goals, but also the goals of the participating golfers and sponsors. Conducting an event as outlined in this document will create a perennially successful fundraising effort.

Charity Benefits

Applied Underwriters Invitational host charities will tie themselves firmly to the upscale image of golf. Golfers, especially country club members, tend to be generous philanthropists. As a result, each local charitable organization will enhance its presence within its community and increase future donations.

Entry fees for the Applied Invitational range from $1,000-$25,000 per team. The actual fees will be determined by each local organization taking into the account individual event costs and donor receptivity in their market. At a price of $1,000 per team, an event will generate gross revenues of $36,000 before local sponsorships and ancillary fundraising efforts are included.

The national sponsors of the Applied Invitational will contribute to your event. For 2024-25, they are Cobra PUMA Golf, Bridgestone Golf, Bass Pro Shops, Under Armour Eyewear, The Experience St Andrews, and Whistling Straits. The Applied Invitational also has special relationships with Style Driver, SportsBox 3D, Global Golf Post, Brush Creek Ranch, Golf Status, Inspirato, All American Classics and Casa de Campo. Organizations can also solicit local sponsors for individual holes or for other events conducted in connection. Please remember that in return for their support, the national sponsors have been guaranteed category exclusivity (see page 16).

In recruiting local sponsors, charities benefit from a unique opportunity to align local sponsors with the national sponsors to provide local sponsors image, status, and results for their investment.

With the assistance of connected fundraising events like auctions, the Applied Invitational should generate upwards of $50,000 for local charities. This success will enhance the potential for future events.

Whistling Straits – Irish Course

Whistling Straits – Irish Course

Invitational.com

The Applied Underwriters Invitational website is Invitational.com. The site hosts information about every local event and links to each charity. It is important that all of the information on Invitational.com is always up-to-date and accurate. If anything on the site is incorrect, please contact the Applied Invitational team at invitational@auw.com.

Invitational.com also houses information about the program's national sponsors and marketing partners, as well as pages devoted to tournament rules, gifts and prizes, and other useful information.

One of the primary features of the site is the media kit found at https://www.invitational.com/media-kit. Charitable partners can access additional resources with the following login information:

Username: Tournament Director
Password: BigDogGolf@03

Those additional resources include public relations templates, downloadable posters, brochures and letterhead, sponsors' logo files, and more. All the information needed to run an event can be found there.

Rules

1. Anti-Discrimination Policy

It is the policy of the sponsors of the Applied Underwriters Invitational that all events are conducted at country clubs and/or golf facilities which do not discriminate on the basis of race, gender, sexual orientation, 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 fair market value of greens fees, food, drink, and other tangible gifts or services of substantial 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 Applied Invitational event, please be sure to integrate other components of your organizations' programs and services into your local event; 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 required by law to take additional responsibility in helping the golfers determine the proper deduction.

3. Event Format

Each Applied Invitational event will 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 event 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 pre-announced time. The second team will tee off when it is safe to play.

As noted earlier, it is strongly recommended that all Applied Invitational events use a four-person scramble format. In a scramble, all four members of the team hit one tee shot on each hole. The team will then select the best ball from which to play their 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 strongly suggested that a volunteer scorer be placed with each team in order to maintain the competitive integrity of the event.

The goal of the Applied Invitational is to distinguish the participating charity and the prestigious sponsors as participants in the highest-quality amateur golf event for charity. If an event has demonstrated that it has achieved this goal with a format other than a scramble, the event does not have to alter its format to become an Applied Invitational event. If your event is not conducted as a scramble, you must alert your winning team that the Applied Invitational National Finals are played as a scramble and that each team invited must comply with the handicap requirements (see page 11). Teams may make substitutions to comply with these rules.

4. Rules of Play

Any high quality, 18-hole golf course that does not discriminate on the basis of race, gender, sexual orientation, or religion is eligible to host an Applied Invitational event.

Except as set forth in this manual, play in Applied Invitational events is governed by USGA Rules. Some rules may be modified by the local rules subcommittee. They are as follows:

- Out of Bounds is defined by white stakes
- Water Hazards are defined by yellow stakes and lines
- Ground Under Repair is defined by white lines
- Lateral Hazards are defined by red stakes and lines
- Each player's tee shot must be used at least three (3) times (it is very important to reiterate this rule before play begins)
- Play all balls up. Lies may be improved anywhere on the course by placing the ball or using the clubhead

Each team member may hit their 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—not closer to the hole—and must remain within the same boundaries as where the selected ball was found.

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 six (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. On the green, players may stand behind a teammate to help determine the line.

There are no playoffs in Applied Invitational events. The method of breaking ties will be matching cards. Matching cards is a form of breaking ties where an arbitrator, the golf professional, 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 men's number one (#1) handicap hole.

If one team has a better score on the #1 handicap hole, that team wins. If the #1 handicap hole is tied, the number two (#2) handicap hole is compared by the professional. This process continues until a winning team is determined.

The host golf professional must be made aware of these rules in case participants have any questions. A copy of the rules should be provided to the host professional well in advance of the event. 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.

In the event a team has fewer than four players, that team is not eligible to win team prizes because they cannot meet the requirement that each team use at least three drives from all four players. Teams with fewer than four golfers must be notified prior to teeing off 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, Hole-in-One). All golfers in Applied Invitational 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 Applied Invitational (all professional golfers, including those employed by golf clubs, country clubs or the like, are not permitted) provided they have paid the entry fee in advance. Each participant must provide their 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 an Applied Underwriters Invitational Handicap Index that may be used for the event. In order to maintain the competitive integrity of your local event:

- All participants must register on-site for themselves
- All participants must provide a photo ID at on-site registration
- All participants must provide Handicap Index verification information prior to the event
- Volunteer scorers should be placed with each foursome
- Charity staff cannot compete

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

The Applied Underwriters Invitational 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 Event Committee simply asks each unhandicapped player to submit their 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 must be attested to (i.e. signed) by the golf professional. The player's Second Best Handicap is the second best score they have provided 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 Applied Underwriters Invitational Handicap Index would be 26.

Amateur women golfers are encouraged to play in the Applied Invitational. 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.

6. Hole-In-One Rules

There are four hole-in-one prizes provided as part of the Applied Invitational program.

First prize package: The Experience St Andrews trip for two golfers to St Andrews, Scotland and $2,500 in cash.

- One round on the Old, 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 coordinate your itinerary

Second prize package: Any golfer who makes a hole-in-one on the Inspirato for Good contest hole will receive a luxury hotel or resort vacation. The charity can upgrade this to a four-night Inspirato residence vacation by offering Inspirato for Good packages during the live auction at no risk.

Third prize package: The golfer who makes the first hole-in-one at the Brush Creek Ranch contest hole will receive a four day/three night vacation, based on space availability.

Other hole-in-one prizes:

- A set of Cobra irons

Hole-in-one prize rules:

- The Experience St Andrews Hole-in-One Contest hole must be at least 185 yards long for men and at least 175 for women
- The Inspirato Hole-in-One Contest hole must be at least 160 yards long for men and at least 150 for women
- The Brush Creek Ranch Hole-in-One Contest hole must be at least 165 yards long for men and 150 yards long for women
- There must be two volunteers monitoring the The Experience St Andrews Contest hole
- Only the first hole-in-one at the The Experience St Andrews Contest hole is a winner
- Only the first hole-in-one at the Brush Creek Ranch Contest hole is a winner
- All holes-in-one at the Inspirato, Cobra, and Bridgestone Contest holes are winners
- Only players' first shots each hole are eligible for prizes, no mulligans or second shots are permitted

Whistling Straits – Irish Course

Handicap Indexes

1. Team Formation:

Each team must consist of four amateur players whose combined USGA Handicap Indexes total 43.0 or more. Only one member of each team may have a USGA Handicap Index of 8.0 or less. All four team members, however, may play with USGA Handicap Indexes higher than 8.0. There is no limit to each team's total USGA Handicap Index. Once each team has been formed with a minimum USGA Handicap Index of 43.0, then the team will compete with the other teams without handicap strokes. This is called competing at scratch. Please note that the Applied Underwriters Invitational handicap requirements refer to the USGA Handicap Index, not the course handicap. The USGA Handicap Index is the number with a decimal point on each player's handicap card. Again, it is your responsibility to verify the participants' Handicap Indexes prior to the event. In addition, players should be asked to provide their Golf Handicap Information Network (GHIN) Number and to show their most current USGA handicap card and a photo ID at on-site registration. If a golfer on a winning team does not have their USGA handicap card, you must reverify their USGA Handicap Index during the event or as soon as possible.

Golfers are required to provide a copy of their current Handicap Index card and/or GHIN number as of/upon registration/payment.

A GHIN number is a form of identification. It is not the golfer's Handicap Index. It is a means of identifying golfers and a reference used to retrieve and verify golfers' Handicap Indexes.

The effective date of each Applied Invitational golfer's USGA Handicap Index is the latter of: a) the day the golfer registers and pays their entry fee, or b) the day 60 days prior to the event date.

Example: For an event held on June 15, if a golfer registers on March 23, you will verify their Handicap Index as of April 15 (60 days prior). If a golfer for this event registers on May 29, you will verify their Handicap Index as of that date.

The date of registration is defined as the date of payment. If a golfer registers more than 60 days prior to the event, their USGA Handicap Index must be verified as of the 60th day before the event. This USGA Handicap Index will remain in effect throughout the Applied Underwriters Invitational National Finals.

If a team member on the team has an emergency and cannot play, the team may use a substitute player. The substitute must have a current USGA Handicap Index which conforms to the Applied Invitational combined and individual USGA Handicap Index requirements. The USGA Handicap Index must be verified by the Golf Committee before allowing the substitute player to participate.

2. Verifying GHIN Handicap Indexes

Ensuring that each golfer's Handicap Index is accurate and in compliance with the Handicap Index requirements of the Applied Invitational protects the integrity of the event and the Applied Invitational as well as protecting your golfers from unscrupulous players. Few things are more damaging to a golf tournament than a suspicion among the competitors that one of the teams did not compete fairly.

At the beginning of 2020, the USGA and other worldwide governing bodies introduced a new handicap system called the World Handicap System (WHS). There are two significant changes. First, handicaps used to be updated bimonthly; handicaps are now revised in real time with the submission of each score. Second, previously, anyone could see a golfer's handicap history and access a golfer's handicap on a particular date. That information is no longer available.

While the constant updating of golfers' handicaps will provide a more accurate representation of how a golfer is currently playing, it does present new opportunities for a golfer to manipulate the system. Each representative of each event will need to check golfers' handicaps immediately upon registration because each round of golf played between the date of registration and the event date will change the handicap. The fluctuating handicaps could impact whether a team complies with the handicap rules at each event.

To ensure fairness, handicaps need to be checked the same day that registration fees are paid or 60 days before the event, whichever is later. The process is easy and fairly quick.

- Go to ghin.com
- Provide a GHIN number and last name. If the person checking handicaps does not have one, they may use: 8073156, Jenkins
- Click on "golfer lookup," which is the second option from the left on the blue bar at the top of the screen
- Select the golfer's home state, enter their last name and hit the magnifying glass
- A list of golfers with that name and state will populate. Find the golfer and confirm their handicap

For record-keeping purposes, a screenshot should be taken and the date of the verification should be saved alongside the handicap number. Because of the constantly updated numbers, it is possible for a team that complies with the handicap rules at the time of registration to dip below the 43.0 threshold by event day. To a person looking up these handicaps on the day of the event—or the day after—this team may appear to be in violation of the handicap rules. Properly following the record keeping procedures is therefore vital to defending the integrity of the competition and the participants in question.

Teams that do not conform to the handicap requirements are not eligible to win any team prizes. You must make them aware of this before the competition. You should have each member of the team sign an acknowledgment that they are not eligible to compete for team prizes.

3. Verifying Non-GHIN Handicap Indexes

There are two sources available to verify non-GHIN Handicap Indexes—the professional at the golfer's home course and their state golf association.

Golf pros are employed by their members. As such, it is a part of their responsibility to enable their members to play in outside events by verifying Handicap Indexes. Occasionally, a golf pro may be unwilling to expose a member who provided a false handicap. State golf associations will be more objective in verifying handicaps because part of their responsibility is to protect the integrity of events in their state and the game in general. State golf associations are not, however, always willing to verify large numbers of handicaps. Therefore, the following steps are recommended:

- When each golfer registers, obtain their GHIN number and the name of their home course
- Contact each golfer's home course and confirm the handicap with the pro
- Contact the state golf association for only the golfers whose courses could not verify or for whom there are suspicions concerning the accuracy of their handicap

It is each Tournament Committee's responsibility to promptly and accurately verify all golfers' handicaps. This is crucial to the invitation process for the Applied Invitational National Finals. Failure to effectively verify handicaps can cause disqualification after the event has been played. This can be embarrassing and can damage the reputation of all involved including the charity, the course, and the Applied Invitational.

Whistling Straits – Straits Course

The Applied Invitational National Finals

Provided they comply with the Applied Underwriters Invitational eligibility rules, the winning teams from all events will be invited to compete in the Applied Invitational National Finals at Whistling Straits. Immediately following the event, the Tournament Director must submit the names, addresses, telephone numbers, verified USGA Handicap Indexes, and GHIN numbers of the members of the winning team to skip@fortune-marketing.com. Delays in reporting this information causes delays in mailing invitations, impacting their flights, practice schedule, and accommodations. At this time, the Tournament Director must reverify the USGA Handicap Index of each member of the winning team as of their date of registration.

Photo identification at registration and GHIN number verification will help to ensure that all golfers are who they say they are and will make Handicap Index verification easier.

The winning teams will be required to respond to their invitations to the National Finals by no later than January 15, 2025. If a member of a winning team is unable to participate in the National Finals, a replacement may be made provided that the team handicap regulations are not violated by the substitution. Substitutes' Handicap Indexes will be verified as of the date of substitution. If the winning team at your local event is unable to attend the National Finals, an invitation may be extended to the second place team or another foursome that will be positive representatives of your event. It is important that each local event has a representative team at the National Finals.

The primary goal of the National Finals is to enhance each local Applied Invitational event by providing an additional incentive for golfers to participate at the local level and to further distinguish the Applied Invitational events and program. Any proceeds from the National Finals will go to a 501(c)(3) charitable organization designated by the title sponsor, Applied Underwriters.

All golfers competing in the National Finals will be required to pay a registration fee estimated to be approximately $1,750 per person. Each participant must stay on site and must reserve their room in the Applied Invitational group room block.

Whistling Straits – Straits Course

No organization may subsidize travel or registration fees for Applied Invitational National Finals participants due to USGA Amateur Status Rules. Any subsidy will make the participants ineligible for competition and will damage the integrity of the event. It could also put the charity and the sponsors at risk of legal action from legitimate amateur participants.

The National Finals is a 72-hole competition. The courses will be set up for a national championship-caliber event and play will be primarily from the championship tees. The team with the lowest total score for the four rounds will be the Applied Invitational National Champions.

It is vital that all events are represented at the National Finals. Playing in the National Finals is a unique opportunity to compete in a national championship at a major championship venue. It is an opportunity participants will be excited about and will drive participation and interest in local events. It also sets the Applied Invitational apart from other charity golf events.

If the winning team is unable to attend the National Finals, a replacement must be invited. This could be a second-place team, an important local sponsor's team, or a group of dedicated board members. It is very important that this is decided before the event begins.

To incentivize extra contributions from key donors and sponsors, the Applied Invitational has developed an extra fundraising incentive. Any team that raises, donates, or sponsors an event with $10,000 in excess of the event registration fee will automatically qualify for the National Finals. For example, if a regular tournament registration fee is $2,000, a total contribution of $12,000 (registration fee and extra donation) will automatically qualify that team for the tournament at National Finals. Golfers will still be required to pay all tournament fees including registration, hotel, and travel. Teams who qualify through this method will be eligible to compete for the national championship if their handicaps conform to the Applied Invitational National Finals Official Rules. Teams whose handicaps do not conform will be welcome to attend as non-competitive teams and will receive all golfer gifts and invitations to non-golf functions.

National Sponsor Conflicts

The success of the Applied Invitational—and the funds it generates for each participating charity—are dependent on the event's national sponsors, Cobra PUMA Golf, Bridgestone Golf, Bass Pro Shops, Under Armour Eyewear, The Experience St Andrews, and Whistling Straits. In their sponsorship contracts, each of these companies has been guaranteed exclusivity in their respective product categories. In addition, similar to the program's full national sponsors, All American Classics has been guaranteed product category exclusivity in exchange for the support they provide the Applied Invitational.

Therefore, companies which compete with the national sponsors cannot be local sponsors of, or provide products to, Applied Invitational events. This prohibition extends to any sponsorship related in any way to the Applied Invitational, 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, or any other event. Furthermore, no mention of a business in any of the product categories may appear in any printed material, including tee markers, hole signs, programs, auction booklets, or in any promotion of the event in print or electronic media. Complete compliance with these exclusivity requirements is extremely important. Each charity participating in the Applied Invitational has a contractual obligation with each national sponsor that will be breached by the inclusion of a sponsor's competitor as a local sponsor or in-kind provider. Such a breach jeopardizes the entire program. Accordingly, be sensitive to the sponsors' needs.

National sponsors' exclusivity can be compromised in other, less direct, ways as well. For instance, a local sponsor that does not compete with any of the event's sponsors may wish to donate golf balls or golf shirts with its logo on them to be used as a prize. If these golf balls are not Bridgestone golf balls, or if the golf shirts are not made by PUMA, a conflict exists. You cannot accept these balls or shirts as prizes or auction/raffle items or display them at the event. If this happens, inform the sponsor that they can purchase golf balls or golf shirts through the Applied Invitational at a favorable price provided through Bridgestone's and PUMA's relationship with this event.

Another potential conflict involves scoring sheets. The golf professional will typically have a few different styles of score sheets at his disposal. Please use score sheets that include one of our sponsors' logos or a blank score sheet. If no acceptable sheets can be found, you must cover up (or white out) the name of the competing company.

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.

Cobra PUMA Golf

Cobra PUMA Golf is the golf club, golf shoe, and golf apparel sponsor of the Applied Invitational. Cobra PUMA is one of the world's premier golf equipment manufacturers and Cobra clubs are used by many of the world's top tour pros. PUMA is one of the world's largest sports apparel and footwear companies and is an industry leader in quality and performance.

Cobra provides a new Darkspeed Driver for each winner. Additionally, Cobra will award golf bags to the members of the third-place team and one to the women's long drive winner. PUMA will provide a player's duffel bag to the members of the third-place team. Cobra will also be offering a set of Cobra irons to anyone making a hole-in-one at the designated Cobra contest hole.

Every Applied Invitational event is required to purchase one gift for each player from PUMA. Events will receive a catalog with apparel, golf shoe, and accessory options to choose from.

If the contract between the charity and the course requires a purchase from the host club's pro shop, that purchase must be a Cobra PUMA product. The purchased Cobra PUMA product should be used as either a raffle prize or as an auction item.

Bass Pro Shops

Bass Pro Shops joined the Applied Invitational as a national presenting sponsor for the first time in 2023. Bass Pro Shops is America's leading retailer for hunting, fishing, camping, and other related outdoor recreation merchandise.

This year Bass Pro Shops will be providing each Applied Invitational event with eight $100 gift cards and one $250 gift card to be used as prizes.

The Experience St Andrews

Another returning national sponsor of the Applied Invitational is The Experience St Andrews. Officially appointed by St Andrews Links Trust, The Experience St Andrews has an exclusive contract to manage the commercial tee-times on the famous Old Course. Programs include a guaranteed tee-time on the Old Course, negating the need to enter the daily ballot. For a group of golfers on a 'once in a lifetime' trip or for an international corporation looking to entertain important clients, The Experience St Andrews can tailor programs to suit anyone's requirements.

As part of its national sponsorship The Experience St Andrews will provide a hole-in-one prize at each Applied Invitational event. Winners of this prize (see details on page 9) will also receive $2,500 in cash.

Under Armour Eyewear

This year Under Armour Eyewear rejoins the Applied Invitational as a national sponsor. They will be providing eight pairs of high-performance sunglasses as part of the fourth- and fifth-place prizes and are offering 4 pairs of sunglasses to anyone making a hole-in-one on the designated contest hole.

In addition, events have the opportunity to purchase Under Armour Eyewear, at great prices, for an additional gift for all of your golfers, to supplement your prize list, or to enhance a sponsor's benefits. Under Armour sunglasses provide another sponsorship option as both the pouches and cases can be branded. To pursue these opportunities further, please contact Skip Jenkins at skip@fortune-marketing.com and he will introduce you to an Under Armour representative.

Bridgestone Golf

Bridgestone Golf, one of the world's premier golf ball manufacturers, is again a national sponsor of the Applied Invitational. Bridgestone will provide two sleeves of golf balls for each player in every local Applied Invitational event as well as balls to be used as first-, fourth-, and sixth-prizes. Additionally, Bridgestone Golf supports the program by providing additional gifts and prizes at the Applied Invitational National Finals.

All American Classics

In 2024–25, the Applied Invitational will again benefit from a great relationship with All American Classics, one of the nation's leading sports memorabilia companies. All American Classics will provide each event with four framed custom photographs to be used as part of the first-place prize. Each framed trophy will feature the host charity's logo. All American Classics will send each event numerous pieces of sports memorabilia on consignment for use at auctions. Unsold pieces can be returned to All American Classics at no charge. A representative from All American Classics will work with the host charity to discuss how the charity will be identified on the trophies and which specific pieces will be most effective at auction. This is not an optional arrangement. Each piece must be used in the auction. The free pieces are provided in return for a commitment to promote the sale of said items. All American Classics will bill the charities for the trophies if the memorabilia is not used in the auction.

The dedicated All American Classics representative will be Karee Hughes who can be reached by email at karee.hughes@allamericanclassics.org or by phone at (501) 915-4771.

Whistling Straits

The winning foursome of each 2024-25 season Applied Invitational event will be invited to compete at National Finals, held at the world-renowned American Club Resort through Destination Kohler, which has hosted six major golf championships and the 43rd Ryder Cup.

Golfers will play on Whistling Straits and Blackwolf Run, courses that offer unparalleled golfing experiences. The Straits course is known for its stunning coastal views along Lake Michigan and its rugged, links-style terrain, while Blackwolf Run is famous for its river, meadow, and bath courses. The venue's meticulously crafted courses, designed by legendary architect Pete Dye, present a formidable challenge for even the most seasoned golfers.

National Marketing Partners

In 2024-25, the Applied Invitational benefits from the support of several key marketing partners: Style Driver, SportsBox 3D, Global Golf Post, Brush Creek Ranch, Golf Status, Inspirato, All American Classics and Casa de Campo.

Global Golf Post provides a free subscription to every Applied Invitational participant and a free trial subscription to Global Golf Post+.

Inspirato is a luxury hospitality company with a portfolio of exclusive luxury vacation homes and five-star hotels and resorts. Each vacation comes with pre-trip planning from a team of travel experts, as well as on-site concierge services and daily housekeeping. Inspirato for Good will provide a valuable hole-in-one prize for every event and will also provide no-risk fund-raising opportunities for your organization with packages tailored for each event. Any golfer who makes a hole-in-one on the Inspirato for Good Contest hole will receive a complimentary three-night luxury hotel or resort vacation. Hosts can upgrade this prize to a four-night iconic Inspirato residence vacation by offering Inspirato for Good packages during their live auction at no risk.

Style Driver is the world's leading golf gift provider. They offer a curated selection of golf gifts for events of all sizes. They support the Applied Invitational by providing every golfer with gift certificates that can be used on golf-related merchandise.

Brush Creek Ranch a collection of all-inclusive guest ranches in Saratoga, Wyoming. Featuring over 30,000 acres of secluded Wyoming wilderness, the ranch provides private hiking trails, ski runs, and access to over 20 miles of access to the North Platte River. The ranch also provides exclusive events and outdoor experiences to its guests to help them relax and reconnect to the natural beauty of the American west. Brush Creek Ranch provides the golfer who makes the first hole-in-one at the Brush Creek Ranch contest hole with a 4 day/3 night vacation at their all-inclusive resort.

Casa de Campo is a luxury golf resort in the Dominican Republic. Billed as one of the world's top golf destinations, Casa de Campo features three courses designed by legendary golf course architect Pete Dye including the No. 1 ranked course in the Carribean, Teeth of the Dog. Other activities at Casa de Campo include eight outstanding restaurants, a Marina, Equestrian Center featuring Polo, Shooting Course, great shopping, and three private pristine white sand beaches. The winner of the Casa de Campo hole in one prize will receive a gift certificate with an all-inclusive value of up to $1,500.

Sponsor Contributions

PRIZES	RETAIL VALUE	PER EVENT
Cobra Darkspeed Drivers (1st place)	$549.00	$2,196.00
Championship Trophies All American Classics (1st Place)	$150.00	$600.00
Bass Pro Shops Gift Card (1st Place)	$100.00	$400.00
Bridgestone Golf Balls (1st Place)	$50.00	$200.00
Applied Underwriters Invitational Dry Bag Large Duffel (2nd place)	$350.00	$1,400.00
Applied Underwriters Invitational "Big Dog" Headcover (2nd Place)	$50.00	$200.00
Bass Pro Shops Gift Card (2nd Place)	$100.00	$400.00
Style Driver Gift Card (2nd place)	$100.00	$400.00
Cobra Ultralite Golf Bags (3rd Place)	$185.00	$740.00
SportsBox 3D Golf Annual Membership (3rd Place)	$120.00	$480.00
Applied Underwriters Invitational "Big Dog" Headcover (3rd Place)	$50.00	$200.00
Under Armour Sunglasses (4th Place)	$149.00	$596.00
SportsBox 3D Golf Annual Membership (4th Place)	$120.00	$480.00
Bridgestone Golf Balls (4th Place)	$50.00	$200.00
Under Armour Sunglasses (5th Place)	$149.00	$596.00
PUMA Players Duffel Bag (5th Place)	$65.00	$260.00
Style Driver Gift Card (6th place)	$100.00	$400.00
Bridgestone Golf Balls (6th Place)	$50.00	$200.00
Applied Underwriters Golf Umbrella (7th place)	$55.00	$220.00
Applied Underwriters Invitational Dry Bag Large Duffel (Closest to Pin)	$350.00	$350.00
Cobra Ultralite Golf Bag (Longest Drive—Women)	$185.00	$185.00
Bass Pro Shops Gift Card (Longest Drive – Men)	$250.00	$250.00
Hole-in-One Insurance for Prizes on 4 Par 3s		$2,500.00

GIFTS	RETAIL VALUE	PER EVENT
Applied Underwriters Invitational Waterproof "Dry" Tote Bag	$215.00	$30,960.00
Applied Underwriters Invitational Waterproof Wireless Speaker	$69.00	$9,936.00
Applied Underwriters Invitational Tartan Valuable Pouch	$20.00	$2,880.00
Applied Underwriters Invitational Golf Hat	$35.00	$5,040.00
Applied Underwriters Invitational Cap Clip with Ball Marker	$25.00	$3,600.00
Applied Underwriters Invitational Magnetic Waffle Towel	$40.00	$5,760.00
Invitational Ball Mark Repair Tool w/Groove Cleaner	$29.00	$4,176.00
Style Driver Gift Card	$50.00	$7,200.00
Bridgestone Golf Balls (two sleeves)	$25.00	$3,600.00
Subscription to Global Golf Post and Free Trial to Global Golf Post+	$10.00	$1,440.00
Trial Subscription to SportsBox 3D Golf Training Program	$25.00	$3,600.00
Casa de Campo gift certificate (potential all-inclusive net value of $1,500)		

TOTAL SPONSOR CONTRIBUTIONS	**$91,645.00**

Sponsor Participation

Applied Underwriters receives two foursomes at every Applied Invitational event. They will pay $1,000 for the second foursome, and will likely exercise this option at every event so local events should plan to host two Applied Underwriters foursomes. If the company elects not to purchase the second foursome, the event will be notified at least two weeks prior to the event. Payment for the second event will be coordinated through Fortune Marketing. Do not look to the Applied representative or participants for payment.

If Applied Underwriters wants more foursomes at the event, that cost is up for negotiation on a case-by-case basis based on hard costs of running the event, availability, and any other factors. Unlike the $1,000 for the second foursome, payment for these foursomes should be coordinated through Applied Underwriters.

None of the other national sponsors are contractually entitled to complimentary or reserved foursomes in Applied Invitational events. Accordingly, if a national sponsor foursome plays in an event, their company will pay in either cash or product. The participating team should be treated like any other competing team and is eligible to win any and all prizes. Since Cobra PUMA Golf, Bridgestone Golf, Bass Pro Shops, Under Armour Eyewear, and The Experience St Andrews rarely participate in events, the experience of their foursomes will form an important part of the company's impressions of the Applied Invitational as a whole.

If a foursome from one of the national sponsors is the only one in the nation to participate, the success of that event from the participant's perspective can influence that sponsor's decision to continue to sponsor the Applied Invitational nationally. It is extremely important that these foursomes be treated well. Recognize their national support by considering discounting their entry fees. Make sure that their company receives all the signage and recognition that they are contractually entitled to on-site, and in any other communication as well as at the banquet. Show them personal attention and express gratitude for their support. Make it easy for them to call their corporate headquarters the next morning and give a good review!

National Sponsor Requirements Checklist

Each of the national presenting sponsors should be recognized at your event, according to the requirements below. As the title sponsor, Applied Underwriters should play a particularly prominent role. Participants should associate Applied Underwriters and the national presenting sponsors with the fun they have at your event.

National Presenting Sponsors:

- Cobra PUMA Golf
- Bridgestone Golf
- Under Armour Eyewear
- Bass Pro Shops
- The Experience St Andrews
- Whistling Straits

The following checklist will ensure that Applied Underwriters and the national presenting sponsors are properly represented at each event:

- ☐ Recognize Applied Underwriters as the title sponsor and all national presenting sponsors in all collateral materials, including rules sheets and public announcements.
- ☐ Ensure that local sponsors do not violate national sponsor exclusivity in the following categories: any commercial insurance lines; personal insurance lines (homeowners, life, fine art and collections, and yacht and pleasure craft); golf clubs; golf shoes; golf balls; and golf apparel.
- ☐ Ensure Applied Invitational and national presenting sponsor signage (banners, tablecloths, and signs) are present at the golfer registration table.
- ☐ Register every golfer at the registration table to ensure every golfer interacts with Applied Underwriters branding.
- ☐ Promote all Hole-in-One, Closest-to-the-Pin, and Longest Drive contests in all rules sheets and on the contest holes.
- ☐ Ensure placement of pop-up signs on all contest holes, as well as two Applied Invitational tee markers on each hole.
- ☐ Place all four Applied Invitational flying banners and all seven Applied Invitational pop-up signs in prominent, easily-visible locations.
- ☐ Use Cobra PUMA Golf or Bridgestone scoring sheets (if available)—no other golf brands may appear on the host club's scoring sheets.

National Sponsor Requirements Checklist (cont.)

- ☐ Place national presenting sponsor signage in the banquet room and luncheon room with Applied Underwriters signage placed prominently to identify it as the title sponsor.
- ☐ Use the emcee script provided in the manual for the awards banquet to ensure that Applied Underwriters as the title sponsor and all national presenting sponsors are recognized appropriately.
- ☐ Ensure all press communications such as press releases and official statements recognize Applied Underwriters as the title sponsor and name national presenting sponsors.
- ☐ Ensure all press communications include boilerplate language for the Applied Invitational and link to the invitational.com website. Please reach out to invitational@auw.com with questions.
- ☐ Report vital information such as tournament winner names, numbers of participants, numbers of volunteers, total funds raised, names of contest prize winners, and other pertinent tournament information to Fortune Marketing Unlimited.
- ☐ Ensure your website includes a link to invitational.com and that effort is made to tag the Applied Invitational. Use #BigDogGolf on your posts.

  /applied-underwriters-invitational

  /AppliedUnderwritersInvitational

  @appliedinvitational

  @AUWInvitational

Thank you for helping facilitate a fantastic Applied Underwriters Invitational event and ensuring that the sponsors are properly recognized. We would not be The #1 Charity Event in Golf™ if it were not for the hard work of our charitable partners.

The Tournament Committee

All events must have an Tournament Committee to schedule, plan, coordinate, and oversee all phases of the event. This committee should consist of 18-25 members and include board members, staff members, and volunteers. It should include the golf enthusiasts among the businesspeople of the community who are already affiliated with the organization.

After the establishment of the Tournament Committee, individual members should be assigned the responsibility of carrying out specific tasks necessary for a successful event. All committee members are responsible for golfer leadership. These members will report their progress to the whole committee and the charity's Executive Director/CEO.

The following are specific guidelines for the formation of a Tournament Committee and the selection of coordinators:

1. Each Tournament Committee should be chaired by a leading philanthropist, businessperson, or professional member of the committee. This will create credibility and establish the prestige of the event.
2. Each chairperson and leader should be interested in golf and/or be influential in the community.
3. In selecting chairpersons and leaders, golfers on the board should recommend people who can devote significant time and have significant golfing enthusiasm.
4. A Vice Chairperson and an Honorary Chairperson (if possible) should be selected. These people should be well established and popular throughout the community. Local celebrities such as media or sports figures can serve well in this capacity. 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.

Whistling Straits – Straits Course

Specific functions of the Tournament Committee:

- Recruiting golfers
- Delivering all sponsorship benefits and entitlements to the national sponsors
- Soliciting local sponsor foursomes (local sponsors must not conflict with National Sponsors, see Section 3.1 on page 21) that will provide a financial contribution and additional prizes
- Soliciting sponsors to underwrite other fundraising components of the event
- Planning ancillary fundraising activities
- Arranging publicity and promotion of the event
- Developing a calendar for planning and conducting the event
- Negotiating with the local club for all event requirements
- Enlisting local celebrity support
- Planning the awards banquet
- Setting entry fees

Whistling Straits – Straits Course

The Tournament Committee

The most successful Applied Underwriter Invitational events are those that have a sizable committee behind them. Events tend to mirror their committees. The following are some best practices for Tournament Committee development:

- Strive for at least 18 committee members—including board members—to recruit a large number of participants
- Provide each committee member with a complete copy of this operations manual
- Fill the committee with well-to-do and well-placed people; they will recruit the same
- Appoint a well-known doctor, philanthropist, businessperson, or professional leader as chairperson to lend credibility to the event
- Tap into your committee's various skills (like marketing and leadership)
- Ask the golf pro at the host club to join the committee
- Ask last year's winning foursome to 'give back' by joining the committee
- Schedule an orientation for new committee members
- Let committee members know what is expected of them:
    - Attendance at a maximum of 3-5 meetings
    - Recruiting two foursomes
    - Selling one hole sponsorship
    - Selling one additional sponsorship
- Make the committee meetings fun to attend: provide food and end on time
- Set meeting schedules well in advance, in consultation with members
- Create written job descriptions for committee members and distribute tasks reasonably among members
- Set terms of service to ensure new perspectives and give members opportunities to contribute in different areas
- Conduct an annual evaluation to assess the committee's accomplishments

Eighteen committee members each recruiting two foursomes and one hole sponsor translates to a full field of 144 players and 18 hole sponsors. It ensures a minimum income of $50,000.

The Tournament Committee

Title: Chairperson

Principal role: Leads steering committee that plans, executes, and evaluates the Applied Invitational event. Oversees the budget, setting of priorities and objectives for the event, and organizes and manages recommendations from the committee regarding the event.

Major responsibilities and tasks:

- Recruit golfers
- Oversee the setting of priorities and objectives for the event and coordinate the event
- Manage the event's budget
- Assist with sponsorship sales and obtaining underwriting dollars
- Preside at all committee meetings
- Secure event location site and coordinate with site representatives
- Assist with securing auction items, prizes, and awards
- Recruit and orient committee members
- Assure that the event format meets all requirements
- Conduct post-event evaluation

Qualifications:

- Business and community contacts
- Leadership skills
- An experienced golfer

Training:

- Local orientation
- Ongoing at committee meetings
- Consultation with charity staff

Time commitment:

- 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 on the day of the event

The Tournament Committee

Title: Sponsorship and Player Coordinator

Principal role: Oversees the recruitment of corporate sponsors and individual players

Major responsibilities and tasks:

- Recruit golfers
- Oversee and motivate committee to recruit sponsors and players
- Tap into corporate sponsorship budgets in a timely manner
- Draw upon entire committee for potential contacts
- Organize efforts to sell out event
- Work with Chair to assign holes to sponsors for signage
- Work with Promotion Coordinator regarding sponsor recognition

Qualifications:

- Corporate and community contacts
- Excellent communication and organizational skills
- Sales, marketing, or fundraising experience

Training:

- Local orientation
- Ongoing at committee meetings
- Consultation with Chair

Time commitment:

- 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 on the day of the event

The Tournament Committee

Title: Event Coordinator

Principal role: Organizes tournament and is responsible for all golf logistics

Major responsibilities and tasks:

- Recruit golfers
- Work with site representative to orchestrate the operational aspects of the event, including format, hole contests, handicaps, pairings, scoring, and carts
- Determine equipment needs and work with the committee to meet those needs
- Chief decision maker and problem solver regarding all golf activities
- Coordinate all on-course refreshments
- Oversee dinner logistics
- Coordinate post-event responsibilities including shipment of signage and excess gifts, submission of golfers to receive subscriptions, and securing a team for the National Finals

Qualifications:

- Strong golf background
- Organizational and leadership skills

Training:

- Local orientation
- Ongoing at committee meetings
- Consultation with Chair

Time commitment:

- Committee meetings: 2-4 hours monthly
- Ongoing activities: six hours monthly
- Just prior to and during event: up to 12 hours weekly and 10 hours on the day of the event

The Tournament Committee

Title: Gifts, Prizes, and In-Kind Donations Coordinator

Principal role: Solicits prizes for auction, raffle, and contests. Solicits gift bag items and obtains in-kind donations

Major responsibilities and tasks:

- Recruit golfers
- Develop master list of merchandise needs for prizes, gift bags, raffles, hole contests, door prizes, food, and beverage
- Recruit committee members
- Develop resources for obtaining items and developing strategy for approaching sponsors
- Inventory donations and submit report to Chair monthly
- Arrange for delivery of donations
- Assist in distribution of gifts and prizes
- Thank all donors

Qualifications:

- Contacts in appropriate businesses
- Organizational and leadership skills

Training:

- Local orientation
- Ongoing at committee meetings
- Consultation with Chair

Time commitment:

- 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 on the day of the event

The Tournament Committee

Title: Promotions and Public Relations Coordinator

Principal role: Organizes public relations and promotion of event

Major responsibilities and tasks:

- Recruit golfers
- Develop and manage public relations and promotions plan including creation of event-specific website
- Oversee all printing, mailing, online promotion, and communication
- Oversee use of social media
- Develop and coordinate agenda for dinner ceremony, recruit emcee
- Handle all press promotion
- Secure a photographer
- Order plaques, signage, and trophies
- Promote National Finals participation to participants and coordinate potential alternate group

Qualifications:

- Experience in public relations, promotions, media relations, and printing
- Excellent communication and organizational skills

Training:

- Local orientation
- Ongoing at committee meetings
- Consultation with Chair

Time commitment:

- 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 on the day of the event

The Tournament Committee

Title: Volunteer Coordinator

Principal role: Recruits and trains volunteers to assist with event

Major responsibilities and tasks:

- Recruit golfers
- Develop master list of past and potential volunteers to reach volunteer needs
- Recruit volunteers
- Train volunteers for their participation
- Maintain records of volunteers
- Supervise volunteers during the event and make assignments
- Provide thanks and recognition to event volunteers

Qualifications:

- Knowledge about the game of golf
- Good community contacts
- Management and leadership skills

Training:

- Local orientation
- Ongoing at committee meetings
- Consultation with Chair

Time commitment:

- 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 on the day of the event

The Tournament Committee

Title: Celebrity Recruitment Coordinator

Principal role: Oversees the recruitment of local celebrities

Major responsibilities and tasks:

- Recruit golfers
- Develop list of potential celebrities
- Write letters and call targeted celebrities
- Make follow-up calls to confirm participants
- Assist with logistics during event

Qualifications:

- Good community contacts
- Excellent written and oral communication skills

Training:

- Local orientation
- Ongoing at committee meetings
- Consultation with Chair

Time commitment:

- Committee meetings: 2-4 hours monthly
- Ongoing activities: eight hours monthly
- Just prior to and during event: up to 10 hours weekly and 10 hours on the day of the event

Volunteer Scorers

Recruiting enough volunteers to work as scorers for each foursome is a tremendous benefit to the competition and one that golfers sincerely appreciate. Having an independent person verify each team's score reduces the possibility of cheating and increases the integrity of the event. Most golfers will participate in many charity scramble events every year. Few of these events will safeguard against cheating by providing scorers. This unique benefit will help secure return participants.

Volunteers have two primary responsibilities: counting the number of strokes their team takes on each hole and recording which player's tee shot was selected on each hole. Although the scorers do not need to be experts in golf or the USGA Rules, they do need to be educated on how the event works and become familiar with the Applied Invitational format and rules. Scorers should be provided with an instruction sheet setting forth their responsibilities for the day and a scorecard to record the team's score and tee shot selection.

Following the round, 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 into the golf pro.

An example instruction and scorecard are included on the following pages.

Whistling Straits – Straits Course

Volunteer Scorers

Sample instructions for scorers

You will be accompanying a four-person team as they compete in the Applied Invitational. Along with this page of instructions, you have also received a scorecard. Please record the names of the golfers and the hole that they started on the scorecard. You will ride out to your starting hole with your team. The event is played using the scramble format—each player will tee off and then the team will choose the best drive and hit their next shot from that spot. This sequence will continue until the ball is holed out. It is important not to talk or make noise while the golfers are playing a shot.

You have four major responsibilities:

1. Before the start of the round and before you ride out to your starting hole, you and the players will count the golf clubs in each bag to ensure each player has no more than 14 clubs
2. You must mark on your scorecard which player's tee shot was selected for each hole as soon as the shot is selected. The team must use each player's tee shot three times during the round
3. You must count and record the team's score on your scorecard and confirm that number with one of the players after each hole. Be sure that you stand where you can see every stroke and start on the hole you started in (it likely will not be hole #1)
4. Compare your score to the team's scorecard, sign it yourself, and have a team member sign it. If the team's score does not agree with yours on every hole, do not sign it. Proceed directly to the scoring table to determine the correct score.

After the scorecard is signed and turned in, you will receive a gift from the sponsors in appreciation of your help and support. You will also receive a box lunch and beverages which will be delivered to you on the golf course.

We hope you enjoy the fine play of the golfers, the spectacular scenery, and the top-ranked golf courses. Your generous support is greatly appreciated by all the charities benefiting from this event, our sponsors, and the golfers competing this weekend. Thank you for making this year's event a great success!

Applied Invitational Scorecard

Date: _____ Starting Hole: _____

Golfer's Names: _____ _____

_____ _____

Scorer's Name: _____

HOLE	TEE SHOT USED (NAME)	SCORE
1		
2		
3		
4		
5		
6		
7		
8		
9		
10		
11		
12		
13		
14		
15		
16		
17		
18		

Scorer's Signature: _____

Player's Signature: _____

The Planning Calendar

1. Developing an Event Calendar

Planning an Applied Invitational event is a year-long process. It should begin in the fall prior to your event. Below is a sample outline of the steps to be taken in the fall, winter, and spring months in preparation for your event.

SEPTEMBER: Begin soliciting sponsors and developing the Tournament Committee

OCTOBER: Secure site and date contract, mail Save the Dates to past participants, update the website and social media

DECEMBER: Secure major sponsorships and raffle items

JANUARY: Sell remaining program space

FEBRUARY: Re-engage sponsors who have yet to commit to this year's event

MARCH: Mail invitations for remaining positions

APRIL: Order shirts and other items for player gifts, recruit volunteer scorers and on-site registration workers

An event calendar must be created to ensure 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 the Applied Invitational event, and sign an agreement with the host club that allows at least 12 weeks of planning time
2. Promptly notify Fortune Marketing Unlimited of the event date and specifics
3. Once the date, site, and specifics are approved, publicize them
4. Immediately inform Fortune Marketing Unlimited if the date or site change

The Planning Calendar

2. Timeline for Success

The ideal scenario for planning an event begins approximately one year ahead of the event date. Here is a sample timeline:

10-12 months prior to the event:

- Recruit and establish committee members who are able to secure two foursome sponsors as well as other local sponsors that will participate
- Draft a preliminary agenda for the event that includes timetables for event start and end times and any pre- or post-event activities
- Determine monthly meeting schedule
- 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
- Create individual call report logs for volunteers to maintain
- Establish a budget to track income and expenses
- Determine and negotiate with the host club, sign contract
- Mail or email a Save the Date notification to past participants and forthcoming prospects
- Call on existing sponsors to secure repeat sponsor commitments

8-10 months prior to the event:

- Delegate specific objectives of committee members, establish sub-committees 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, beverage, golf shirt, contest, and ancillary event sponsors
- Begin soliciting major auction and raffle items
- Establish media campaign and initiate media pitches

The Planning Calendar

6-8 months prior to the event:

- Mail and email a follow-up notification to past participants
- Determine on-site volunteer needs and recruit individuals
- Establish and categorize a cold call list of potential sponsors that all committee members can call upon
- Compile a list of local celebrities to be contacted as possible guest speakers, honorary chairs, and participants
- Build a website dedicated to promoting your event

4-6 months prior to the event:

- Schedule a critical path committee meeting to review budget, individual committee member recruiting efforts, sub-committee reports, media campaign status, and ancillary fundraising initiatives
- Continue soliciting auction and raffle items
- Design invitations and review distribution list for discrepancies, additions, and overall efficiency for mail and email process

Three months prior to the event:

- Schedule a full status committee meeting to evaluate overall progress
- Schedule a meeting with golf course management to review logistics and time frames
- Mail or email invitations to the event
- Provide posters and brochures to private and public clubs, athletic clubs, sporting goods stores, and other logical places of business

The Planning Calendar

Two months prior to the event:

- Schedule a full status committee meeting to evaluate overall progress budget, cold call reports, sub-committee reports, media campaign status, and ancillary fundraising initiatives
- Tabulate the number of confirmed golfers and continue to recruit until a full field is secured
- 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, newspapers, TV and radio stations, and other applicable resources
- Arrange promotional appearances for event 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 not in the GHIN system
- Place shirt orders with Fortune Marketing Unlimited

One month prior to the event:

- Schedule a committee meeting at the host course and golf club that is host to the event and conduct a walk through with all staff, committee members, and volunteers for familiarity purposes and to determine logistics and placement
- Review budget, cold call reports, sub-committee reports, media campaign status, and ancillary fundraising initiatives
- Meet with head golf pro to review rules, team check-in and start times, handicap index verification, scoring, course setup, registration process, food, and beverage setup
- 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- and post-event activities
- Tabulate volunteer force for day of event to determine additional needs
- Assign a committee member to oversee scorers and rules process

The Planning Calendar

Two weeks prior to the event:

- Schedule a full status committee meeting to evaluate overall progress on budget, cold call reports, sub-committee reports, media campaign status, and ancillary fundraising initiatives
- Finalize the media campaign with the publicity sub-committee member(s) to confirm times and dates for event coverage and participation
- Prepare a checklist of staff and volunteer assignments for day of event
- Tabulate the number of confirmed golfers and continue to recruit until a full field is secured
- Organize pairings list for submission to golf pro
- Create 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 of the same
- Confirm all needed supplied are secured

The Planning Calendar

One week prior to the event:

- Submit final report of entrants to the Tournament Committee so any necessary last minute pairings can be made
- Submit news release to all local media
- Conduct a final check of details with the golf pro, major sponsors, and pre- and post-event contacts
- Predetermine a set arrival time for all staff
- Review checklist of individual responsibilities
- Confirm all volunteers and job responsibilities
- Make the necessary food and beverage arrangements for volunteers

Event day

- Arrival at golf club by all staff and volunteers
- Submit individual instructions to all personnel
- Execute event

Post event

- Email database with all participants' contact information, the names and contact information of the winning team, and the winners to Skip Jenkins at skip@fortune-marketing.com
- Secure a team to represent the event at the Applied Invitational National Finals

Blackwolf Run - River Course

Golfer Recruitment

The committee is responsible for recruiting a full field of golfers. Every effort must be exerted to achieve this level of participation. Events without a full attendance reflect poorly on the organization, the program, and are unsatisfactory in the eyes of the sponsors.

The committee's first task will be to compile a target list of golfers from mailing lists and/or contacts, local golf club membership lists, amateur golf association lists, business employee lists, and other fundraising lists. In addition, the chairman must ask each committee member to submit their 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 event. Invitations should be sent to all potential players. Personalized invitations will work best. The best formula for a full field is to have 18 committee members each recruit two foursomes and one local sponsor.

Once a potential golfer receives an invitation to play, they must be personally asked to play. Do not depend on a golfer to participate until they have actually paid the entry fee.

Each week, the committee must consider a report of those contacted by committee members. The total number of golfers should be determined and new list of prospect participants compiled. One week later, the total number of golfers who have paid to participate must again be compiled. Continue this process until the event is filled with 144 or more paid golfers.

The event will fail if the only effort is website traffic, posters, mailings, and group emails. People donate to people, so put a personal touch on your efforts and reach out individually to secure participation.

One of the primary target audiences for golfer recruitment will be the employees of local companies. These companies can provide numerous foursomes for competition. Many companies schedule golf outings for their employees, those outings could become a part of the Applied Invitational. With permission, posters can be placed in visible areas of each company's offices.

Corporations often use golf outings to reward their clients. The Applied Invitational, being the #1 Golf Event for Charity,™ offers corporations an opportunity to entertain their clients in a high quality, pleasurable, and competitive atmosphere. Consider development of a localized packet on the Applied Invitational explaining how the companies can benefit from an involvement with this prestigious event. Most importantly, remind upper management that all proceeds benefit charity. Whether a company buys two teams to entertain clients or a full field of teams, the corporate outing approach is a win-win for all parties.

Sample Invitation Letter

Letterhead and brochures are available for download at https://www.invitational.com/media-kit

Dear (Mr./Ms.):

(Prominent Citizen's Name) and the (Charity Name) cordially invite you to participate in the Applied Invitational golf event to be held at (Club Name) on (Day), (Date).

The Applied Invitational raised $10 million for charity last year, and has raised well over $286 million in net charitable proceeds over the life of the program. This year, the goal is to raise $11 million. The Applied Invitational provides an opportunity for you to compete in the #1 Charity Event in Golf.™ Members of the winning team will receive Cobra Darkspeed Drivers as well as the opportunity to play in the Applied Invitational National Finals at Whistling Straits with other event winners. Other top teams will win prizes from Cobra PUMA Golf, Under Armour Eyewear, Bass Pro Shops, Bridgestone Golf, and The Experience St Andrews.

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 by the office. Teams must consist of four amateur players whose combined USGA Handicap Index total 43.0 strokes or more. Only one member of a team may have a USGA Handicap Index of 8.0 or less. However, all four players may have USGA Handicap Indexes higher than 8.0. These team formation requirements provide everyone, men and women, scratch golfers and high handicappers, with a chance to win.

A volunteer from the (Charity 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 (Charity Name).

Sincerely,

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

NOTE: Enclose a brochure with this mailing!

Communication with National Sponsors

Communication with all national sponsors should be handled through Fortune Marketing Unlimited. Please contact Skip Jenkins or Loren Shapiro if you have a need to communicate with the sponsors.

Blackwolf Run - Blackwolf Run

Generating Income

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 the event. Local hole sponsors cannot conflict with the national sponsors’ product exclusivity (see page 16). Each hole sponsor will be allowed to display only one banner on one hole during the event; hence the term “hole sponsor.” Local companies should also be recruited to sponsor or underwrite event expenses. Since the national sponsors will provide most of the product support for the event, it is critical that they appear more prominently at the event than any local sponsor, regardless of the extent of the local sponsor’s contribution. The goal of the local sponsor recruitment leader is to have all costs underwritten by the event’s sponsors.

2. Methods to increase net income

The following are some methods to add to the income generated by the event. The monetary figures listed are based on past experiences and are extremely conservative. Numbers may be higher. Please contact the Fortune Marketing Unlimited for more information about these methods.

- Make sure the committee has 18 or more people and ensure they all recruit two foursomes and a local sponsor, this should increase the income by $3,000
- If the event entry fee has not changed in a few years, consider raising it by $25 or more to generate an additional $3,600
- Run a $1,000,000 Shoot-Out (more about this later in this section) to generate an additional $5,000
- Invite regional college football/basketball coaches to play—not only will this create more buzz for your event, it will allow you to potentially charge an additional $10,000 to play on their team
- Create an advertising booklet and sell ads to local companies for an additional $4,000
- Run a live or silent auction with sports memorabilia, dinners, event tickets, and more at the awards banquet to raise an additional $25,000
- Run a skins game for the golfers where the charity pays out half the pot unless there are no skins left—at $50 per team, this will raise an additional $750-$1,000
- Raffle off prizes from local businesses or from the pro shop—this will increase proceeds by $1,000-$2,500

Generating Income

- Sell mulligans (one per player) for $25 each or $100 per team, this will generate an additional $3,600
- Sell sponsorships to the driving range or putting green for $1,000
- Allow teams to use a professional golfer for one drive, at $20 apiece this will generate $720
- Run a grab bag live auction with 20-30 small gifts from local companies in bags on each table at dinner which can be auctioned off to other tables and can generate $2,000
- Honoring a high-ranking political figure can generate newsworthiness and will command a higher premium to join their team: this can generate an additional $5,000-$10,000
- Sell guest tickets to the awards banquet and auction, this will add an additional $200
- Solicit one company to be the dominant local sponsor who is recognized in all Applied Invitational promotional pieces ("The Applied Invitational hosted by Pepsi") to raise a minimum of $10,000
- Allow companies who field a team AND sponsor a hole to compete for a special corporate trophy—this will raise an additional $2,500
- Provide golf shirts, windshirts, or other branded items and have a local sponsor underwrite the cost, this can add an additional $1,500-$3,000
- Sell sponsorships for greens fees, golf carts, lunch, dinner, beverage cart, and more to reduce costs by $3,000-$10,000
- Mark a 20-foot circle around the pin on a par 3 hole and allow golfers to bet whether they will land inside, if they do they double their money, if they don't the charity keeps the money—this can raise at least $500
- Run a reverse raffle for $50 per ticket to increase revenue by $2,500

Events that have incorporated Supertickets in their fundraising strategy have realized significant gains to the bottom line. Supertickets are extremely flexible, combining a scratch card game with the sale of packages of other benefits—choose to include whatever elements the committee determines (mulligans, long drive). They are a great way to reach supporters who want to earn real prizes and contribute to the event, but can't attend the event.

Some events are concerned about conducting raffle drawing for a lot of small prizes. Don't be! You can conduct a 20-40-prize raffle drawing including dinners for two, tickets to local games and museums, and cases of beer. By selling the tickets at registration and throughout lunch, a committee member can pull the raffle tickets while the players are on the golf course and then have a raffle board showing the winners of each prize so that the golfers can pick-up their prizes after dinner.

Generating Income

The $1,000,000 Shoot-Out:

The $1,000,000 Shoot-Out is essentially an elaborate Closest-to-the-Pin contest that can supplement proceeds generated by the Applied Invitational. Instead of the winner taking home a small prize, they win the opportunity to hit a shot for $1,000,000.

Format:

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 event is completed, creating a festive and exciting atmosphere for both the media and other golfers.

Benefits:

The $1,000,000 Shoot-Out can renew players' and committee members' interest and enthusiasm in an established event, or boost an event that has not met expectations.
The Shoot-Out will bring additional media exposure to the event and organization and increase recruitment. As the charity golf market becomes more and more saturated, the $1,000,000 Shoot-Out will differentiate the Applied Invitational. Financially, events will benefit in three ways:

1. More players: The event field will grow because more players will want to be a part of this new event. This growth will also provide a larger base for ancillary fundraisers like auctions, raffles, mulligans, and skins.
2. Shoot-Out entry fees: Players pay approximately $10 to participate. If 100 players compete, it will raise $1,000.
3. Sale of $1,000,000 Shoot-Out title sponsor: 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.

Generating Income

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 p.m. sports segment live from the golf course and feature the shots for the $1,000,000. The timing is perfect as teams will have just finished their round.

Pre-event press releases will have a better chance of being placed because 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 benefit all of local sponsors. You will now be able to justify an increase in all local sponsorship fees.

Promotion:

The real value lies in the pre-event promotions. For this reason it is important to decide to implement the Shoot-Out approximately ten weeks prior to the event.

It is very important to include information on the Shoot-Out in all communications to potential golfers. A Shoot-Out title sponsor will also want this pre-event exposure.

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

Insurance:

Several companies 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.

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 the event a volunteer will sell tickets to participate in the Shoot-Out, much like the sale of mulligans.

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

Generating Income

The $1,000,000 Shoot-Out, continued:

As with any local sponsor it is important that the local Shoot-Out sponsor (or the additional prizes provided by the insurance company) does not conflict with the national sponsors: Cobra PUMA Golf, Bridgestone Golf, Under Armour Eyewear, The Experience St Andrews, or with All American Classics.

Schedule:

- **Twelve weeks prior to the event:** Propose to committee
- **Eight to ten weeks prior to the event:** Secure title sponsor
- **Nine weeks prior to the event:** Contact insurers and arrange for coverage
- **Eight weeks prior to the event:** Include information on Shoot-Out in all of your golfer mailings
- **Four weeks prior to the event:** Include information on Shoot-Out in pre-event press releases
- **Four weeks prior to the event:** Arrange interviews on radio and TV for committee chair or publicity leader
- **Four weeks prior to the event:** Arrange for media to cover the Shoot-Out
- **Two weeks prior to the event:** Arrange for club pro and police officer or videographer to be present
- **Two weeks prior to the event:** Recruit Shoot-Out volunteers
- **Event day:** Promote heavily at registration and sell tickets for the Shoot-Out
- **Post-event:** Include Shoot-Out results in post-event press release

Publicity

The Applied Invitational will be one of the most prestigious amateur sporting events in the area. As part of the largest corporate-sponsored amateur charity golf event in the world, every tournament will warrant extensive media coverage. Media coverage is essential if the event is to succeed as a sporting event and fundraiser. Media personnel, particularly those in sports, will welcome the opportunity to cover the event as well as participate in it if properly informed of the significance of the Applied Invitational as a national amateur championship event.

Create a Publicity Leader position within your Tournament Committee who is responsible for publicizing the event. They must work closely with local newspaper, radio, and television personnel to generate as much exposure as possible for the event. This person will be supported by the Applied Underwriters Invitational team, which will supply a feature article and help with garnering media attention.

It is absolutely imperative that newspaper, television, and radio outlets be contacted to publicize the event if all spots are filled. Every Tournament Committee has a responsibility to the national and local sponsors to publicize the event. Furthermore, the more publicity generated this year, the more valuable the event will be to sponsors in the future.

In order to secure media placements, it may be necessary to offer media outlets a local sponsorship in the event. You may also invite a notable media personality to emcee the event and invite local reporters and sports media to play at no charge.

Another way to generate media attention is to host a “media day.” Invite the local media to play golf with the Tournament Committee before the event. This will give them an opportunity to ask questions and learn about the event while having fun.

This effort and expenditure will be repaid in the form of increased exposure.

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 title sponsor, Applied Underwriters, and all national sponsors. The national sponsors’ names should appear exactly as follows: The Applied Invitational presented by Cobra PUMA Golf, Bridgestone Golf, Bass Pro Shops, Under Armour Eyewear, and The Experience St Andrews.

In the public’s eye, perception is reality—if the event 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 including invitations, programs, flyers, and any other printed materials. It is also imperative that the national sponsors are featured more prominently than any local sponsors.

Publicity

How to achieve the greatest publicity possible through established media:

- Develop a website dedicated to the event
- Create a Facebook, LinkedIn, and Instagram page to promote the event
    - Please use the charity’s logo as the profile picture
    - “The Applied Invitational” may be used in the name of the page, but please include something in the title that identifies the specific charity and event
    - Do not post any images for which the event does not have written permission to use, including photos taken by anyone outside of the Tournament Committee
    - Monitor the page for abusive and inappropriate content on a regular basis
    - Send the URL and contact information for the page administrator to Skip Jenkins at skip@fortune-marketing.com
- Host a pre-event press conference
- Host a media day
- Sign up local media to be hole sponsors
- Ask the directors at local stations for suggestions about obtaining additional publicity
- Send press releases to all newspapers, radio, and television stations on a regular basis to announce the date, chairpeople, notable people who play, updated participation numbers, and any other important milestones
    - Get to know the local journalists and develop relationships—they are more likely to use press releases from people they know and trust
    - Ensure media members have ample time and access to turn around a story
- Invite all media outlets to cover the event live

Publicity

How to achieve the greatest publicity possible through other channels:

- Put posters, brochures, fliers, and window displays in pro shops and locker rooms at golf courses, sports stores, men's shops, recreational centers, and health clubs
- Contact local community newspapers
- Contact company newsletters and magazines, especially those of local sponsors
- Get in touch with local and regional golf publications
- Utilize the organization's website and social media

Blackwolf Run - The Baths of Blackwolf Run

Public Relations Checklist

A focus on garnering local media attention supports the mission of the Applied Underwriters Invitational by spotlighting our charitable partners and the community-focused causes that are supported at each event. The Applied Invitational's PR Team will work with you to create press releases, identify the best media outlets in your area, and pitch events.

The following is a checklist of how this process works and protocol charities should follow to earn the best media placements surrounding the event:

Pre-event

- ☐ An Applied Invitational team member will schedule a call with you and a writer, who will conduct a 30-minute interview to gather the information we'll need to write a press release. Things to think about pre-call: your organization's mission, how the organization has helped the local community (facts, figures and statistics help immensely), how the Applied Invitational has helped recipients in the past, and how you plan to use event proceeds.
- ☐ A press release and media outlet list will be sent to you for approval prior to any pitching. If you already have a relationship with key local media, let us know if you'd prefer to send releases directly.
- ☐ If local media would like to conduct an interview, we are available to assist with messaging prior to the interview.
- ☐ Begin compiling images, graphics, and quotations for media members to use.
- ☐ Generate a fact sheet about your charity and have it ready to place on your website. Have this on-hand on tournament day.
- ☐ Begin promoting the event online and through social media.

During the event

- ☐ Assign a charity leader to be the sole spokesperson of the charity at the event, and direct media members to that person to answer all questions.
- ☐ Have printed copies of press releases, fact sheets, and quotes available.
- ☐ Keep a count of vital figures that occur during the event: participation numbers, volunteer numbers, and the total amount of funds raised.

After the event

- ☐ We will contact you immediately following the tournament for information so, if appropriate, we can craft a post-tournament press release for immediate release.
- ☐ If you have professional photographs, please share them with us so we can send them with the release.
- ☐ You may be asked by the media for further comment in the days following the tournament. Please make yourself available as needed.

For questions or assistance, please contact Sheila Gallagher, Applied Underwriters Public Relations, at sgallagher@auw.com or (415) 710-1290.

The Golf Course

The PGA Professional at the host course will help set up and conduct the event. Make sure they work hard on the Applied Invitational event. They are being paid for their time and effort. The professional is responsible for:

- Placement of posters and brochures to inform golfers of the event
- Supervising the set up of the golf course, including ensuring a proper overall yardage, spacing of men's and women's tees, and minimum distances on hole-in-one holes
- Placing name and distance markers on the course for Closest-to-the-Pin, Longest Drive, and Hole-in-One contests
- Providing pin sheets
- Administering and supervising the event
- Scoring tabulation, skins tabulation, and tie-breaking
- Resolving rules and scoring disputes

The charity must work closely with the rest of the golf course staff to ensure a successful event. In addition to the above, the following responsibilities must be completed with the assistance of the golf course staff:

- Send out personal invitations to members of host club
- Decide on the event schedule such as time for afternoon shotgun start, cocktail party, banquet, and other ancillary events
- Set up the course such that it is challenging, but not too hard
- Ensure correct yardage, men's tees should measure approximately 6,400-6,700 yards and women's tees should be 5,600-6,000 yards
- The golf staff should plan on extra staffing to handle valet parking, golf bag carriers, beverage cart, scoreboard, extra carts, and Hole-in-One contest monitors
- Have rainout and rain delay contingency plans prepared and a make up date scheduled, this should be a prerequisite to entering any agreement with a course
- Prepare for special events such as Closest-to-the-Pin and Longest Drive, and establish corresponding prizes
- Prepare pin sheets noting the exact position of each hole on the day of the event

On the following page is a Golf Course Setup checklist sheet listing what must be discussed with the hosting golf professional. Provide the golf professional with a copy of the Applied Invitational Rules well in advance of the event.

Blackwolf Run - River Course

Golf Course Setup

Golf Course Setup Checklist

- ☐ Shotgun start time: _____ PM
- ☐ Number of players: _____
- ☐ Number of golf carts: _____
- ☐ If tables, chairs, and measuring tapes are needed please give hole number and locations (green vs tee)

  _____ _____

  _____ _____
- ☐ Please indicate hole number for Longest Drive contest: _____
- ☐ Please indicate hole number for Closest-to-the-Pin contest: _____
- ☐ The Experience St Andrews Hole-in-One hole (must be at least 185 yards for men and 175 yards for women): _____
- ☐ The Inspirato For Good Hole-in-One (must be 160 yards long for men and 150 yards long for women): _____
- ☐ Cobra Golf Club Hole-in-One contest hole (no minimum yardage): _____
- ☐ Brush Creek Ranch Golf Hole-in-One hole (no minimum yardage): _____
- ☐ Registration area will be setup at _____ by _____ AM

Before the Golfers Arrive

Make sure food and beverage and setup 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 staff the registration table, hand out gifts, and set up the various tables described below:

- Registration table: Check everyone in, check IDs, Handicap Index index cards, and collect each player's name, address, and email
- Prize table: Display team prizes as well as Longest Drive and Closest-to-the-Pin prizes

Rules and Prizes Summary

Scramble format:

- All players play at scratch, no handicap strokes will be counted
- All players hit one tee shot on every hole
- Choose the best shot and have all players hit their next shot from that spot (within one club length, no nearer to the hole)
- Continue this sequence until the ball is holed out
- Record one score for the team

Rules of play:

- Each of the four player's tee shot must be used at least three times
- Play all balls up, rake sand traps between shots
- USGA Rules, except as modified by local rules, apply
- The penalty for breach of the 14-club rule is disqualification
- All ties are to be determined by the host PGA Professional who will match scorecards beginning with the men's #1 handicap hole
- 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 other teams, please replace all divots, repair all ball marks on greens, rake sand traps, and keep carts on path.

Hole # _____ is a Hole-in-One hole, the prize is a trip to St Andrews.

Hole # _____ is a Hole-in-One hole, the prize is a set of Cobra irons (4-PW).

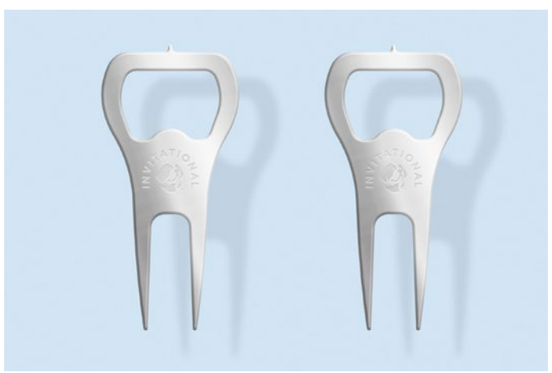
Hole # _____ is a Hole-in-One hole, the prize is a four day, three night vacation.

Hole # _____ is a Hole-in-One hole, the prize is a three-night luxury hotel or resort vacation.

Hole # _____ is the men's Longest Drive hole, the prize is a $250 Bass Pro Shops gift card.

Hole # _____ is the women's Longest Drive hole, the prize is a Cobra golf bag.

Hole # _____ is a Closest-to-the-Pin hole, the prize is a large duffel bag.



Rules and Prizes Summary

Event Prizes

First-Place Prizes
The Championship Trophy, Cobra Darkspeed Drivers, Bridgestone Golf Balls, Bass Pro Shops Gift Cards, and an invitation to compete at the National Finals at Whistling Straits

Second-Place Prizes
Applied Invitational Dry Bag Large Duffel, Applied Invitational Big Dog Headcovers, Bass Pro Shops Gift Cards, and Style Driver Gift Cards

Third-Place Prizes
Cobra Ultralite Golf Bags, Applied Invitational Big Dog Headcovers, and SportsBox 3D Golf Annual Memberships

Fourth-Place Prizes
Under Armour Sunglasses, Bridgestone Golf Balls, and SportsBox 3D Golf Annual Memberships

Fifth-Place Prizes
Under Armour Sunglasses and PUMA Players Duffel Bags

Sixth-Place Prizes
Style Driver Gift Cards and Bridgestone Golf Balls

Seventh-Place Prizes
Applied Invitational Golf Umbrella

Contest Opportunities

Longest Drive (Men)

Longest Drive (Women)

Individual Contest Prizes

Hole-in-one

Participation Gifts
You'll receive an Applied Invitational Dry Tote Bag, Golf Hat, Cap Clip, Bridgestone Golf Balls, Style Driver Gift Card, and much more, just for participating.

During and After the Round

While the golfers are playing

Golfers will be on the golf course for at least five hours. The competition will proceed without need for manpower. Take this time to completely set up the banquet room and prepare for the awards ceremony, raffle, auction, and other ancillary fundraising activities. Banners used at the registration area must be moved to the banquet room. The prize display table must also be moved to the banquet room. During this time, please confirm with the food and beverage and club managers that all arrangements are in place for the awards dinner. Also 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
    - The awards banquet should consist of a plated, sit-down dinner for each golfer
    - Set up banners and prizes well in advance of the banquet, while the golfers are on the course and out of sight
    - A podium is necessary for the awards ceremony
    - After the scoring has been competed out of the public view, ask the hosting pro to post the score sheets so that the winner's scores are on display
    - It is recommended to host a cocktail party of no more than one hour
2. Awards and prizes

On the following pages is the 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 Applied Underwriters as the title sponsor and national sponsors Cobra PUMA Golf, Bridgestone Golf, Under Armour Eyewear, Bass Pro Shops, and The Experience St Andrews at this time. These sponsors donated the prizes which will be awarded to the winners, and thus deserve mention and thanks. At the end of the script is information about the Applied Invitational National Finals that should be read by the MC. Subject to final handicap verification, all winning eligible teams will be invited to compete in the Applied Invitational National Finals (registration fee required).

MC Script

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

MASTER OF CEREMONIES SCRIPT - AWARDING OF PRIZES

The (Charity Name) and Applied Underwriters would like to thank you, the golfers, for making today's Applied Invitational event a huge success. These events are made possible nationwide by Applied Underwriters and the following national presenting sponsors: Cobra PUMA Golf, Bridgestone Golf, Under Armour Eyewear, Bass Pro Shops, and The Experience St Andrews. Also helping to make the event possible are Whistling Straits, host of the Applied Invitational National Finals, Style Driver, SportsBox 3D, and All American Classics. We would also like to thank our local sponsors such as: _____

The winner of the Men's Long Drive Contest on hole # ____ in today's event will receive a $250 Bass Pro Shops gift card. He is _____.

The winner of the Women's Long Drive Contest on hole # ____ in today's event will receive a Cobra golf bag. She is _____.

The winner of the Closest-to-the-Pin Contest on hole # ____ in today's event will receive a large duffel bag. He/she is _____.

The members of the seventh-place team will each receive an Applied Underwriters golf umbrella. Congratulations to the team of _____, _____, _____, and _____.

The members of the sixth place team will each receive a $100 Style Driver gift card and a dozen Bridgestone golf balls. Congratulations to the team of _____, _____, _____, and _____.

The members of the fifth place team will each receive a pair of Under Armour sunglasses and a PUMA duffel bag. Congratulations to the team of _____, _____, _____, and _____.

The members of the fourth place team will each receive a pair of Under Armour sunglasses, a SportsBox 3D annual membership, and a dozen Bridgestone golf balls. Congratulations to the team of _____, _____, _____, and _____.

MC Script

The members of the third place team will each receive a Cobra golf bag, a SportsBox 3D Golf annual membership, and an Applied Invitational Big Dog Headcover. Congratulations to the team of _____, _____, _____, and _____.

The members of the second place team will receive an Applied Invitational dry bag large duffel,, an Applied Invitational Big Dog Headcover, a $100 Bass Pro Shops gift card, and a $100 Style Driver gift card. Congratulations to the team of _____, _____, _____, and _____.

The members of the winning place team will each receive a Cobra Darkspeed Driver, one dozen Bridgestone golf balls, and a $100 Bass Pro Shops gift card. The team will also be invited to compete in the Applied Underwriters Invitational National Finals to be held at Whistling Straits on May 1-5, 2025. Each member will also receive a commemorative framed trophy, courtesy of All American Classics. Congratulations to the team of _____, _____, _____, and _____.

Again, the (Charity Name) and Applied Underwriters would like to thank all the participants in today's Applied Invitational. Without you there would be no event. Your contributions will help (insert cause). The (Charity Name) also thanks Applied Underwriters, Cobra PUMA Golf, Bridgestone Golf, Under Armour Eyewear, Bass Pro Shops, The Experience St Andrews, Whistling Straits, Global Golf Post, Style Driver, SportsBox AI, Brush Creek Ranch, Casa de Campo, Inspirato, and All American Classics for making these events possible both here locally and in more than 80 other cities across the United States.

Follow Up

A database of all Applied Invitational participants which includes each player's name and email address must be sent to Skip Jenkins (skip@fortune-marketing.com) immediately following the event. Also include a list of the winners and their handicap information.

Post Event Checklist

- ☐ Email Skip the total number of participants, volunteers, total funds raised, and an excel file with the names and email addresses of all participants for fulfillment of the Global Golf Post subscriptions
- ☐ Email Skip the names, email addresses and handicaps of the four members of the winning team so that the winners' handicaps can be verified and they can be invited to the Applied Invitational National Finals
- ☐ Email Skip the names and email addresses of the winners of the prizes
- ☐ Return any unsold auction items to All American Classics

Blackwolf Run - The Baths of Blackwolf Run

Sample Event Agreement

NOTE: In contracts with the host golf clubs, avoid committing to a minimum number of dinners and/or greens fees. If the club insists on such a commitment, negotiate it down as low as possible. Events have lost significant revenues by 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 "Charity") and _____ (hereinafter referred to as "Club") with regard to golf course availability and use during the "Invitational" (hereinafter referred to as "Tournament") to benefit the Charity.

Whereas, the Charity conducts the Tournament for the benefit of the Charity and its programs, and;

Whereas, the Club owns, maintains and operates the golfing facility in _____ known as _____;

Therefore, the parties herein agree to the following:

1. The fees for the Tournament paid to the Club by the Charity 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 _____, 202_. 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 with a combined USGA Handicap Index totaling 43.0 or more. Only one participant per team will be allowed a USGA Handicap Index of 8.0 or less.
5. The Charity currently estimates that the tournament will have between 120 and 160 participants.The Charity agrees to provide to the Club, by telephone, a more accurate estimate of the actual number of Tournament participants on _____, 202_, and again on _____, 202_.
6. In the event the Charity 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, then the tournament shall be rescheduled for _____, 202_.
7. The Charity Committee will provide to the Club a listing of Tournament pairings on _____, 202_, 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 Charity 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 Charity 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.
10. The Club agrees to provide to the Charity the use of all of its facilities including, but not limited to, the golf course, carts, clubhouse, banquet facilities, etc. on _____, 202_.
11. The Club agrees to provide various registration table(s) to be ready for use by the Charity four (4) hours prior to the beginning of the Tournament.
12. It is further agreed that the Charity and the Club have agreed upon the handicapping system of the "Invitational" 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 Applied Invitational awards banquet for use by the Charity 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 Charity 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 Charity.
14. The Charity agrees to pay the club $ _____ for each participant in attendance at the awards banquet to cover banquet costs.
15. The Club will furnish and set up a podium and sound system for use by the Charity.
16. It is the intent and understanding of the parties that nothing in this agreement between the Charity 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.

Amateur Status Rules

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 learn more about the amateur status rules at https://www.usga.org/content/usga/home-page/rules-hub/amateur-status.html.

2-1. General

An amateur golfer must not conduct or identify himself as a professional golfer.

For the purpose of applying these Rules, a professional golfer is one who:

- plays the game as his profession; or
- works as a professional golfer; or
- enters a golf competition as a professional; or
- holds or retains membership of any Professional Golfers' Association (PGA); or
- holds or retains membership of a Professional Tour limited exclusively to professional golfers.

Exception: An amateur golfer may hold or retain a category of PGA membership, provided this category does not confer any playing rights and it is purely for administrative purposes.

Note 1: An amateur golfer may inquire as to his likely prospects as a professional golfer, including applying unsuccessfully for the position of a professional golfer, and he may work in a professional's shop and receive payment or compensation, provided he does not infringe the Rules in any other way.

Note 2: If an amateur golfer must compete in one or more qualifying competitions in order to be eligible for membership of a Professional Tour, he may enter and play in such qualifying competitions without forfeiting his Amateur Status, provided, in advance of play and in writing, he waives his right to any prize money in the competition.

3-1. Playing for Prize Money

a. General

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

b. Prize Money to Charity

An amateur golfer may participate in an event where prize money or its equivalent is donated to a recognized charity, provided the approval of the Governing Body is first obtained in advance by the organizer.

(Conduct contrary to the purpose 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 making a hole-in-one during a round of golf on a golf course.

An amateur golfer may also accept a prize in excess of the limit in Rule 3-2a, including a cash prize, for making a hole-in-one during contests held outside a round of golf, including multiple-entry contests, and contests conducted other than on a golf course (e.g., on a driving range, golf simulator, or putting green) provided in all cases that the length of the shot is at least 50 yards.

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.

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. If an amateur golfer is in receipt of an educational golf scholarship (see Rule 6-5), or may apply for such a scholarship in the future, he is advised to contact the national body regulating such scholarships and/or the relevant educational institution to ensure that any competition expenses are allowable under the applicable scholarship regulations.

a. Family Support

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

...

d. Team Events

An amateur golfer may receive expenses when they are representing the following in a team competition, practice session or training camp:

- Country,
- Region, state or county golf union,
- Golf club,
- Business or industry,
- A similar body

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 he is competing.

Fourteen Club Rule

4-1. Clubs

b. Limit of 14 Clubs; Sharing, Adding or Replacing Clubs During Round

(1) Limit of 14 Clubs. A player must not:

- Start a round with more than 14 clubs, or
- Have more than 14 clubs during the round.

If the player starts a round with fewer than 14 clubs, he or she may add clubs during the round up to the 14-club limit (see Rule 4.1b(4) for restrictions in doing this).

When the player becomes aware that he or she is in breach of this Rule by having more than 14 clubs, the player must immediately take the excess club or clubs out of play, using the procedure in Rule 4.1c(1):

- If the player started with more than 14 clubs, he or she may choose which club or clubs will be taken out of play.
- If the player added excess clubs during the round those added clubs are the ones that must be taken out of play.

After a player’s round has started, if the player picks up another player’s club that was left behind, or a club is mistakenly put in the player’s bag without his or her knowledge, the club is not treated as one of the player’s clubs for purposes of the 14-club limit (but it must not be used).

(2) No Sharing of Clubs. A player is limited to those clubs he or she started with or added as allowed:

- The player must not make a stroke with a club being used by anyone else who is playing on the course (even if the other player is playing in a different group or competition).
- When the player becomes aware that he or she has breached this Rule by making a stroke with another player’s club, the player must immediately take that club out of play, using the procedure in Rule 4.1c(1).

See Rules 22.5 and 23.7 (limited exception in partner forms of play allowing partners to share clubs if they have no more than 14 clubs between them).

Handicap - Player Responsibilities

1.3 Responsibilities of Player, Handicap Committee and Authorized Association

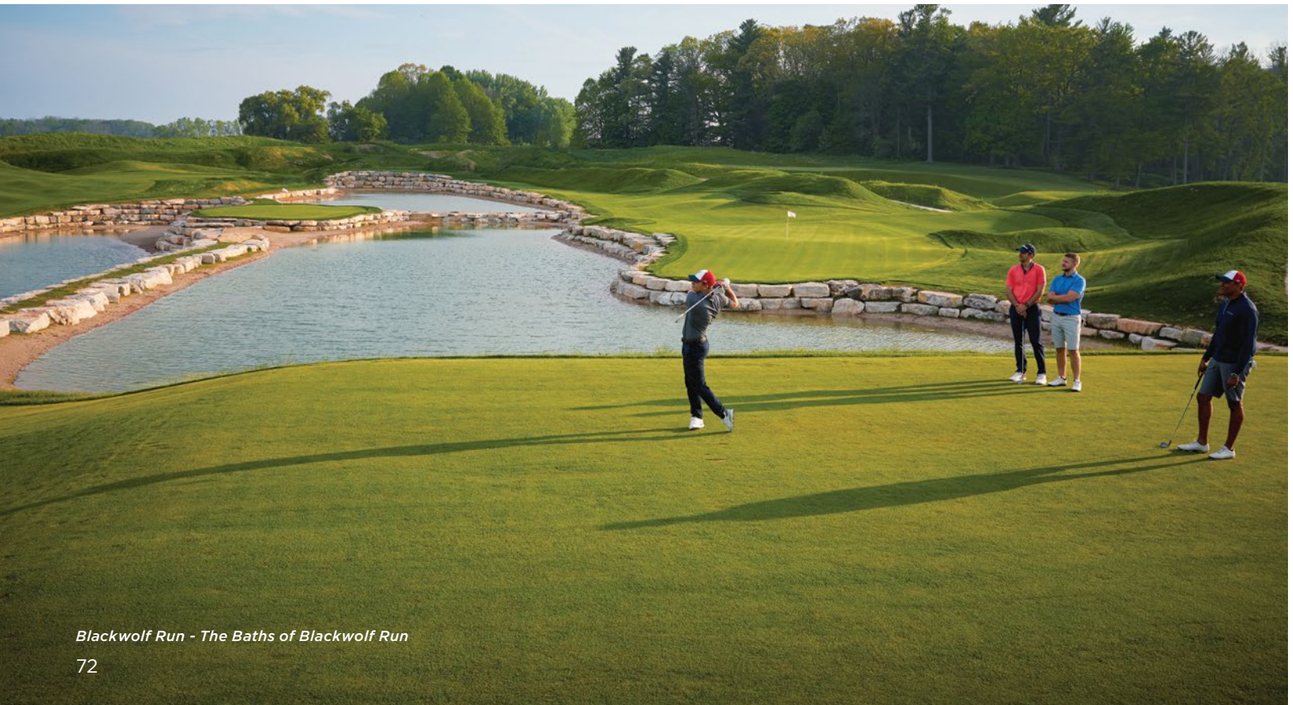
Players, Handicap Committees and Authorized Associations all play an important role in ensuring the Rules of Handicapping are being implemented and administered appropriately.

The main areas of responsibility for each key stakeholder are:

Player

A player is expected to:

- Act with integrity by following the Rules of Handicapping and to refrain from using, or circumventing, the Rules of Handicapping for the purpose of gaining an unfair advantage,
- Attempt to make the best score possible at each hole,
- Submit acceptable scores for handicap purposes as soon as possible after the round is completed and before midnight local time,
- Submit acceptable scores to provide reasonable evidence of their demonstrated ability,
- Play by the Rules of Golf, and
- Certify the scores of fellow players.



Blackwolf Run - The Baths of Blackwolf Run

Frequently Asked Questions

Q: Why would golfers want to play in my event when there are "90 other golf tournaments in my city this summer"?

A: Planned properly, the Applied Invitational is, quite simply, the #1 Charity Event in Golf.™ No other amateur golf event combines the excellent prizes, prestigious sites, charitable fundraising, and the opportunity to advance to Whistling Straits to play for a national championship like the Applied Invitational does.

Q: My event doesn't attract enough golfers, what can I do?

A: It's not really what you 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 get the local media involved. Get a local celebrity to serve as a co-chairperson.

Q: I keep hearing about other Applied Invitational events 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 section entitled "Generating Income." 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 event 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 event 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 event 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 contract.

Q: Can we play a 9-hole event?

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 score an event 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 teams' 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: A local business wants to give every golfer in my event a gift pack, should I accept it?

A: You may accept the business' gift pack provided that none of the items in it conflict with our sponsors' guaranteed product exclusivity. For example, if the gift pack contains golf balls with the business' logo, you can only accept them if they are Bridgestone golf balls.

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-in-one?

A: Quite simply, you should use whichever insurer gives you the best deal. If the insurer offers you additional prizes, you must make sure that they do not conflict with our sponsors' product exclusivity before accepting 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 events 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, 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 event.

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 they are 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's 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. Their total is more than 43.0, is this a problem?

A: Yes. If a golfer provides you with a handicap that does not contain a decimal point, it is a red flag that they are 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.

Q: One of my golfers does not have a USGA Handicap Index. Can I give him a handicap for the event 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 Applied Invitational 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.b of this manual. If possible, you should try to avoid having to use second best handicaps. If you learn that one of your golfers does not have a USGA Handicap Index, you should urge them to try to obtain one before the event date. To obtain a USGA Handicap Index, the golfer should call their 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 cheating at my event?

A: 1.) Before your event, each golfer's USGA Handicap Index must be verified to ensure that handicap 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.

Q: Where can I get 36 volunteers to serve as scorers for my event?

A: Local golf associations or clubs, retirement groups, friends of Applied Invitational golfers, junior golf programs, high school golf teams, civic groups, the Telephone Pioneers of America, volunteer groups from professional golf events in your area, and employees of your local sponsors are all strong candidates to contact.

Q: I can sell all of the spots in my event, do I have to let the national sponsors play?

A: Yes. They are contractually guaranteed one foursome and the opportunity to purchase a second one.

Q. The same team has won my event every year and it is hurting my attendance. What should I do?

A: Never lose sight of the fact that the Applied Invitational is an invitational event. 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 fundraising efforts.

Q: A player from one of the teams in my event canceled at the last minute. Can I let the other three golfers play as a threesome?

A: The remaining three players can play but they cannot compete for team prizes. They are, however, eligible to win individual prizes (Longest Drive, 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 unprofessional for the golfers or the event's sponsors to see you setting up. Having your golfers or sponsors arrive at the event while you are still setting up is akin to having a contributor arrive for a meeting while you are still getting dressed. 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 and the golf course itself. Prepare the banquet room while the golfers are on the course. If your event looks great at all times, the golfers and sponsors will be impressed and 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 titled "Planning an Applied Invitational".

Q: What should the MC say and how can I make sure they remember all of the national sponsors?

A: The manual provides you with a prepared script for the MC. This script, which can be found in Section 5.j, contains everything the MC must say at the awards banquet. You can supplement this script with remarks that are appropriate for your specific event.

Q: The winning team wants to know how much the registration fee is for the National Finals. When I tell them, they want to know why they have to pay for their hotel room and other expenses. How can I best answer their questions?

A: The registration fee for the National Finals will be approximately $1,750 per person. The USGA Rules of Amateur Status prohibit a charity or anyone else from paying someone's expenses to play in a golf event. Therefore, in order to be eligible to receive prizes at the National Finals, the golfers must pay a registration fee. The amount of the registration fee is based on the cost of the golf and the functions at the National Finals. Complete details on the National Finals are included on the National Finals Fact Sheet provided to each local event for distribution to the winning team at the awards dinner along with the first place prizes.

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 and be invited to compete at the National Finals. 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 professionals compete in the event?

A: No. Professionals, 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.

Q: Can celebrities play with the four-person teams?

A: Yes. The celebrity must play his/her own ball and may not participate in the scramble competition. The celebrities may compete against each other individually.

Q: My event 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 event committee thinks that there is enough light left for the play-off, but the rules state that all ties should be broken by matching cards starting with the men's number 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 have a 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 fundraising activities.

Q: I met with the host golf professional and they told me that they were going to set up the course at about 6,000 yards because that's how they always set up charity events, and play will be too slow if the course is set up longer. Should I let them set the course up like they always do?

A: No, you deserve individual treatment from your golf pro. You are paying a great deal of money, and as such, 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 events. Set the golf course at an enjoyable yet challenging length. 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, and you are not holding anyone up by setting up a challenging course.

For help with any other questions, or for clarification of the answers given above, please contact Skip Jenkins with Fortune Marketing Unlimited, at skip@fortune-marketing.com.

APPLIED
UNDERWRITERS

BRIDGESTONE
GOLF

Bass Pro Shops

THE
EXPERIENCE
ST ANDREWS

UNDER ARMOUR

WHISTLING
STRAITS

Whistling Straits - Irish Course

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