



PRESENTED BY



2017 Birdies for Kids Information Manual

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Background Information

Tournament

- Purpose: The Shaw Charity Classic aims to not only provide Calgary with a world-class professional sporting event accessible to families, but also to bring much needed dollars to local charities.
- Dates: August 30 – September 3, 2017
- Title Sponsor: Shaw Communications

- Patron Group (Tournament Owners):
 - Clay Riddell, Tournament Chairman
 - Allan Markin
 - Jim Riddell
 - Guy Turcotte
 - Keith MacPhail
 - Gary Peddle
 - Stephen Ames

- Event Management Team: Bruno Event Team
 - Sean Van Kesteren: Executive Director
 - Caitlin Buckell: Sales and Marketing Director
 - Jenn Faulds: Tournament Manager
 - Rhys Royer: Sales & Marketing Coordinator
 - Lauren Calvert: Tournament Coordinator
 - Geoff Edwards: Operations Coordinator
 - Mitch Lagadin: Volunteer & Logistics Assistant

- Sport Governing Body: PGA Tour Champions, subsidiary of PGA Tour
- Location: Canyon Meadows Golf & Country Club
- Field: 78 Professionals (minimum 50 years old)
- Purse: \$2.35 million USD
- Defending Champion: Carlos Franco
- Broadcast: Golf Channel
- Attendance: 42,500 (2016)
- Awards: Champions Tour President's Award (2014 & 2015), Champions Tour Outstanding Achievement Award (2013)

Charity

- 2013: Inaugural Shaw Charity Classic contributed \$2.2 million to southern-Alberta charities, which was the largest Champions Tour donation in history at the time
- 2014: We topped our record-setting donation in 2013, by contributing \$2.4 million to southern-Alberta children & youth charities
- 2015: Introduced a new charitable initiative, Birdies for Kids presented by AltaLink, that raised \$2.3 million alone, increasing our 2015 total tournament charitable contribution to \$3.9 million
- 2016: Raised \$3.7 million through Birdies for Kids presented by AltaLink, for a total 2016 tournament charitable contribution of \$5.2 million.

Program Summary

- 2015 Birdies for Kids:
 - 89 Participating Charities
 - 995 Donors
 - Total raised: \$2.3 million
- 2016 Birdies for Kids:
 - 113 Participating Charities
 - 1600 Donors
 - Total raised: \$3.7 million
- Fundraising program where charities generate contributions through flat donations.
- Participating charities solicit donations from individuals and/or corporations to generate new donations. **The Shaw Charity Classic will not solicit donations for any participating charity.**
- This program was designed to be integrated into your current events to generate new and additional funds. We do not want all of your existing donations to be funneled through the program, but rather have charities use the leveraged giving concept to bring in new donors. Please see the pledge solicitation section of this manual for tips!
- Charities will receive 100% of every donation collected on their behalf, as the Shaw Charity Classic tournament will cover all administrative and program expenses. This is a great point to highlight to potential donors, as some programs take cuts off the top.
- **Charity Benefits:**
 - No Risk! No out of pocket expenses
 - Charities receive 100% of every donation
 - Additional donation funds through matching program
 - Online donation portal access
 - Use of official Birdies for Kids logo and trademark
 - Individual charity name to be included on select Birdies for Kids recognition materials
 - (4) Single Any One Day tickets for each charity
 - Special pricing on tickets and hospitality packages
- **Shaw Charity Classic Responsibilities:**
 - Payment of all fees associated with the program
 - Collection and record keeping of donations
 - Website and database management
 - Promotional materials including pledge cards
 - Best practice manual
 - Support for all participating charities soliciting donations
 - Invoicing and tax receipt distribution (please see full details in the reconciliation section of this document)

Pledge Solicitation

- This program was designed to be integrated into your current events to generate new and additional funds. We do not want all of your existing donations to be funneled through the program, but rather have charities use the leveraged giving concept to bring in new dollars.
- *Depending on many factors including charity revenues, number of existing donors, fundraising staff, fundraising events per year, etc, each charity had success for different reasons in 2016. We will outline different scenarios that will hopefully help in 2017, but please contact Lauren if you have any questions.*
- *This is a great opportunity to try out new fundraising tactics as there is no risk for being involved in the program. If you aren't sure about something, feel free to contact Lauren and she can help brainstorm ideas or see something from a fresh perspective.*
- **Different Promotion Opportunities:**
 - One-on-One Conversations
 - Charities that targeted specific companies, individuals, or community groups had a lot of success.
 - One charity had a donor in the wing that had never committed but was open to the idea, and with the mention of matching they jumped right on board.
 - Some charities found it hard to explain the nature of the program through mass communication, but in a one-on-one chat they were able to fully get the matching point across, as well as the 100% pass through of funds.
 - The value in doing five telephone campaign calls was much higher than blasting an email out to 1,000 donors. Most charities found that eblasts were good in the beginning to make people aware of the program, but being more detailed to specific donors was the best follow-up plan.
 - If you know any golf fans that are donors it is a great opportunity to engage. You may find that you have a donor that is already a volunteer or supporter of the Shaw Charity Classic and wants to get involved in other ways. On your application one question is about what businesses, community groups, and organizations you work with and this helps the Birdies for Kids staff make connections. A staff member may reach out to you to let you know that a company or group you work with is a supporter of the tournament in other ways.
 - Corporate Partnerships
 - A few of our 2016 charities partnered with corporate organizations that held employee fundraising events such as “wear jeans to work day” or sports leagues. These are easy and fun ways to engage your corporate partners while leveraging the matching dollars available in the program.
 - Engagement and Buy-In
 - Successful charities have high buy-in and awareness of the program throughout the entire organization. Engaging all staff, volunteers, board members, schools, and communities proved to be very successful.
 - One charity brought this program to their board of directors, which gave one of the board members the idea to incorporate this program into an upcoming event

the director was attending. The member proposed that the event donate a percentage of the profits back to the Birdies for Kids program to be matched. Without opening this program up to the Board the connection may never have happened.

- Fundraising Events
 - One charity used this opportunity to host their first ever cocktail reception. For charities that don't currently have a robust strategy for individual or corporate donors, this is a great opportunity to put an event together.
 - Silent auctions are a great way to help raise funds for Birdies for Kids. By including a poster about Birdies for Kids, having manual pledge forms around the tables, or simply highlighting on each donation sheet that their donation goes even further encourages people to donate and go even higher with their bid. If you do include Birdies for Kids at one of your silent auctions please see the reconciliation section of this manual for more information.
 - Other examples of fundraising events that involved Birdies for Kids in 2016:
 - Golf Tournament
 - Bottle Drive
 - Program Kick-Off Event
 - Gala
 - Stampede Breakfast
 - Poker Tournament

- Golf Course Partnerships
 - Partnerships work well in smaller communities outside of Calgary. The tournament already taps into many of the Calgary golf courses and therefore some are not as open to get further involved.
 - A partnership may include a donation jar, a silent auction prize, etc.
 - Charities that already host golf tournaments have found selling mulligans, or entries into contests during the tournament is a great way to incorporate Birdies for Kids into the event.

- Social Media
 - There are two types of posts that occurred in 2016, informational-based and engaging. Informational-based posts did not engage followers and often passed along great text, but didn't have great success soliciting donations. Engaging posts including things like encouraging re-tweeting or running contests had more success in directly getting donations. A combination of one informational-based post with some engaging posts mixed in was a good way for donors to learn about the program, but also receive a call to action.
 - Based on feedback from 2016, charities found that that just relying on social media was not effective. Social media is a great way to create awareness of the program, but does not typically result in donations.
 - Pigging backing off of the Shaw Charity Classic's social accounts helped smaller charities with less followers. By re-tweeting and tweeting using the same hashtags, many charities got new followers.

- Eblasts
 - Charities that had success with eblasts kept them relatively simple, and most have large donor bases. Some charities reported that the program was difficult to convey through a mass eblast, while others that kept it simple but offered places for individuals to receive more information garnered more positive results. One charity noted that putting something about a matching program directly in the subject line of the email resulted in more opens and more clicks directly to the donation portal.
 - Using phrases such as “Make your donation go even further with matching up to 50%!” with a “Click Here” button that links to the Birdies for Kids donation portal is a great call to action piece for an eblast. This is engaging for donors and makes it easy for them to find the donation page.

- Email Signature
 - A great way to get the word out to your donor base about your participation in Birdies for Kids is by including a blurb/photo/logo in your email signature.
 - This year we have provided you with an email signature that you are free to use throughout the duration of the program. Linking this to your charities Birdies for Kids donation page is an easy way for donors to learn more and donate!

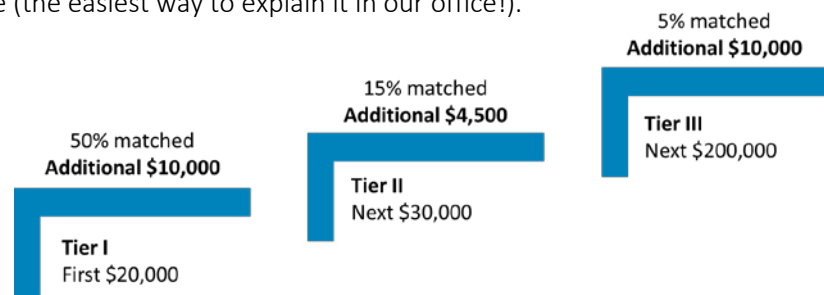
- Manual Donation Form
 - Keeping hard copies of the brochure in charity offices was helpful, but it was not a reliable source for a large amount of donations. They are a great piece to have at events for people to pick up and read, but are not enough to rely on by themselves. Please email birdies@shawcharityclassic.com to request manual donation forms.

- On-Site Presence
 - Charities that used their four tickets to attend the tournament found success in getting information out about their charity.
 - There is the potential to purchase a tent at a reduced charity rate in our spectator village. You could split the tent with two other charities and each take one of the weekend days, or run something all weekend.
 - Some charities hosted donors, volunteers, and staff members by purchasing reduced cost hospitality tickets which proved to be great value.
 - Shaw Charity Classic staff is happy to help you build an on-site presence for a great value. If you would like to inquire about special charity pricing on hospitality options or tickets, please contact Lauren.

- Solicitation Letter
 - Similar to last year, we have created a solicitation letter from the Shaw Charity Classic and Birdies for Kids that might aid you in fundraising. This letter can be found in the documents folder.

Matching Program

- This is the most unique and exciting part of the program and it comes together from various corporate supports with **AltaLink being a founding partner of the program.**
- Given our current economy it is a great way for you as a participating charity to drive donations and use as an incentive for giving.
- Matching will be done based off collected amounts and all matching funds will be paid out in the Fall of 2017. We will use your help if needed to collect as much as possible in the weeks after the tournament, however, our program prides itself on maintaining an uncollection rate of under 1%.
- A ceiling of \$250,000 of collected amounts for each charity is eligible for matching.
- It is a dollar per dollar matching, and thus a charity does not have to hit a certain tier to receive the funds.
- The 2017 matching tier structure has not changed from 2016 and follows a reverse income tax structure (the easiest way to explain it in our office!).



- In 2017, the Calgary Shaw Charity Classic Foundation will distribute a matching pool maximum amount of \$1,000,000 among all official Birdies for Kids participating charities based on the following formula. Any amount collected by a charity, up to \$20,000, will be matched at 50%; any amount collected above \$20,000 (but less than \$50,000) will be matched at 15%; and any amount collected above \$50,000 (up to \$250,000) will be matched at 5%. For example, if a charity collects \$250,000 it will receive \$24,500 in matching funds per the above formula. However, in the event the official participating charities collectively collect an amount that would result in matching funds in excess of the \$1,000,000 pool, the Calgary Shaw Charity Classic Foundation reserves the right, in its sole discretion, to substitute alternative matching percentages (decreased pro rata) for those outlined above. Due to the unpredictability of whether a charity will be over or under their goal we cannot determine if matching percentages will change until the final collected amount is determined.
- Examples
 - 1) Charity 'A' raises \$2,500 through the Birdies for Kids Program
 - All \$2,500 is matched 50% which means their final cheque is **\$3,750**
 - 2) Charity 'B' raises \$45,000 through the program
 - It is matched using the following formula:
 - First \$20,000 x 50% = \$10,000
 - Next \$25,000 x 15% = \$3,750
 - Total cheque from the program is **\$58,750**

Donation Consent

- Donors have the option to share their donation information with the selected charity or to remain anonymous.
- A donor has the option to either select 'I agree' or 'I do not agree' option on the manual pledge form
- On the manual pledge form we have highlighted it as much as possible to make sure people select one of the choices, but there is a chance they glance over it. We have outlined all we can for individuals, but if you are asking somebody to fill it out or watching somebody fill it out please bring that to their attention.
- **You will note that it says "This does not allow the specific charity to contact me regarding commercial purposes without further consent."**
 - We worded it this way to have more people check off the box allowing you to follow-up and thank them for their donation. This consent allows for sending a thank-you only. At that point you can ask them about further consent, or as is the case for most of you, you likely already have their consent for further contact.
- After working with our lawyer and following all privacy, sensitivity, and CASL laws, we believe this is the best solution to have the most information passed along to charities. We think this is a huge step up from last year and believe it will solve most problems regarding anonymity. As the year goes along, please feel free to provide any feedback to help us make it even better in 2018.
- As with last year, if you have an anonymous donor and want to send them a thank-you please contact Lauren to coordinate.

There will be an online donation consent piece set-up in a similar way. We will send you more information with the online portal information once finalized.

Ways to Donate: Manual Pledge Form

- Manual pledge forms are available for all charities online, as well as in the documents folder.
- We will not be mass mailing the donation forms out to all charities however we will do a run with our printer and charities can request certain amounts to be mailed out to cut down on charity printing costs. Please give us at least three weeks advance warning if you would like pledge forms.
- Once a form is filled out, it can be sent directly from a donor to the Shaw Charity Classic office, or through the specific charity. Please note, they are not the responsibility of the tournament until they are received.
- All information on a manual pledge form is inputted into the online donation portal so all participating charities will have access to this information online.
- Please make sure to thoroughly fill out the form. If you receive a form please make sure if they wrote a cheque it is made out to the correct name.

Ways to Donate: Online Donation Portal

We are still finalizing the 2017 online donation portal and will be emailing out an information manual. This will include login information as well as a how to use guide. Please be patient as we are working hard to have this up and running as soon as possible!

Reconciliation

- Timing
 - Donations are charged immediately (invoiced or through credit card)
- Tax Receipts
 - **All tax receipts will come from the Calgary Shaw Charity Classic Foundation.** As a participating charity staff member you do not need to worry about these.
 - On the manual pledge form please indicate if you need a receipt or not for your donation. All online donations will receive a receipt if it qualifies.
 - If a donor asks, please let them know that tax receipts will be distributed throughout the year, with all receipts being issued by November 30, 2017.
 - Donations made by credit card will receive a tax receipt via email immediately following their donation. If donors do not provide us with an email address, we will mail the tax receipt via regular Canada Post.
 - Donations made by cash or credit card will receive a tax receipt either by email or mail. Tax Receipts will be sent out throughout the duration of the program.
- Payment by Cheque
 - **All cheques have to be made out to 'Calgary Shaw Charity Classic Foundation'.** Please note that if they aren't we have to return to the original donor or the participating charity.
 - *This is different than the Shaw Charity Classic – all cheques need to have 'Foundation'.*
- Cheques Directly From a Participating Charity
 - Cheques will not be accepted from a participating charity without proof that the individuals that contributed were aware that their money was going to Birdies for Kids. **Please speak to Lauren before you send in a charity cheque to ensure it can be submitted.**
 - This could include:
 - Donation Jar: When you submit your cheque please include a photo of the donation jar with Birdies for Kids information posted on or near.
 - Cash Donation: Please have anybody that gives a cash donation fill out our manual pledge form and include that with the cheque you send.
 - Event: When you submit your cheque please include photos from the event or marketing collateral from the event that has Birdies for Kids information included.
- Credit Card Limit
 - All donations through credit card must be under \$5,000. If you are aware of a donor that would like to make a donation over \$5,000 by credit card, please speak to Lauren for approval and she can override this limit on your account.
- Silent Auctions

- If you want to include Birdies for Kids in your silent auction please follow one of the three methods outlined below.
 - 1) Please have all winners fill out a manual pledge form for the amount and include either their credit card information or a cheque. Please indicate on the form that it is a silent auction and no tax receipt is needed. We will then run the credit card through our system to minimize your fees. The pledge forms can be mailed or delivered to Lauren's attention at the Shaw Charity Classic office. Please note that since no tax receipt is issued, individuals only need to fill in their name and payment information which will not take more time than if you were to process it with a payment terminal on your own.
 - 2) Charities are welcome to bring up our online donation portal. On the portal under company please write 'Silent Auction' so we know not to issue a tax receipt. Bidders can fill out their personal and credit card information and have the online system process their payment immediately.
 - 3) You can request to use one or two of our mobile pay portals at your event. These portable portals can be attached to your iphone, android or tablet and will accept VISA or Mastercard. Please note we only have two of these portals and will they be loaned out on a first come, first serve basis. Please give us two weeks notice if you would like to request one or more of these portals so that we can arrange a convenient pick up time.

- Payout Schedule
 - Cheques can be requested during the donation period on a rolling basis depending on your balance.
 - *Once a charity has over \$5,000 in flat donations a cheque can be requested by submitting a cheque request form to Lauren. This form can be found in the documents folder.*
 - You can log online to see your donations and track your progress.
 - Once the flat donations have been received and deposited by the Shaw Charity Classic Foundation we will begin to issue a cheque. Please note that the longest a cheque will take is four weeks.
 - All matching funds will be held until the end of the program year in Fall 2017
 - A charity may only make up to 3 cheque requests throughout the duration of the program.
 - Please note **no cheque requests will be processed after July 31** due to the high volume of requests and donations.

- Timeline
 - February 1, 2017 – September 3, 2017: Donation Period
 - September 22, 2017: Collection Period Ends
 - Fall 2017: Final Cheques are sent out
 - This cheque includes any remaining flat donations that have not been requested, and matching funds.

Rules & Regulations

1. Charities may notify their constituents via normal communication (ex: newsletter) that they are participating in Birdies for Kids, but may not directly or indirectly request a pledge be made in advance of the official period. Failure to abide by this provision will result in expulsion from the program.
2. Limited use of the trademarks Birdies for Kids and Shaw Charity Classic will be granted to all participating charities. Samples of materials bearing the trademarks must be submitted to Shaw Charity Classic prior to distribution.
3. Unauthorized use of the trademarks *Birdies for Kids* and *Shaw Charity Classic* is strictly prohibited and is grounds for expulsion from the program.
4. The participating charity is responsible for the collection and submission of all completed pledge forms to the Shaw Charity Classic. The tournament is not responsible for any pledge forms not received by the established deadline. Pledge forms that come in without the appropriate signature will not be processed.
5. Donations will be accepted beginning Wednesday, February 1, 2017 and the donation cut-off date is Sunday, September 3, 2017 at 11:59:59 PM MT. Please mail or drop off all pledge forms collected within those dates to:

Shaw Charity Classic Attn: Lauren Calvert
Suite 1700 Bow Valley Square III
255 – 5th Ave SW
Calgary, AB T2P 3G6.
6. Payments to participating charities from the Calgary Shaw Charity Classic Foundation will be equal to 100% of the value of collected pledges. No payment will be made on uncollected pledges.
7. Pledges on entry forms without a designated charity will be donated to the Calgary Shaw Charity Classic Foundation and applied to the Birdies for Kids matching fund. All Birdies for Kids matching fund dollars will be used as part of the bonus benefiting all participating charities.
8. In 2017, the Calgary Shaw Charity Classic Foundation will distribute a matching pool maximum amount of \$1,000,000 among all official Birdies for Kids charities based on the following formula. Any amount collected by a charity, up to \$20,000, will be matched at 50%; any amount collected above \$20,000 (but less than \$50,000) will be matched at 15%; and any amount collected above \$50,000 (up to \$250,000) will be matched at 5%. For example, if a charity collects \$250,000 it will receive \$24,500 in matching funds per the above formula. However, in the event the official participating charities collectively collect an amount that would result in matching funds in excess of the \$1,000,000 pool, the Calgary Shaw Charity Classic Foundation reserves the right, in its sole discretion, to substitute alternative matching percentages (decreased pro rata) for those outlined above.
9. Payment of pledges is to be made to **CALGARY SHAW CHARITY CLASSIC FOUNDATION** and not the soliciting charity. Calgary Shaw Charity Classic Foundation will make payment to the participating charities of all collected pledges earned by that charity. After the established deadline, a listing of all uncollected pledges will be provided to each charity organization.
10. Rules may be amended at any time at the sole and absolute discretion of the Shaw Charity Classic, Calgary Shaw Charity Classic Foundation, or Calgary Golf Promotion.

Branding

- As a participating charity you receive limited use of the trademarks Birdies for Kids and Shaw Charity Classic. A branding guide and logos are included in the documents folder.
- Highlights:
 - All materials bearing the name or logo must be submitted to Lauren prior to use.
 - On your submission email please include the date you need approval.
 - There are two main logos – one has the AltaLink tagline and one does not. Please use the appropriate one based on the branding guide.
 - The program is called ‘Birdies for Kids presented by AltaLink’ and the tournament is called ‘Shaw Charity Classic’. **There are no variations on these full names.**
 - Please do not add golf to the title (ie. Shaw Charity Golf Classic)
 - Once the full name of ‘Birdies for Kids presented by AltaLink’ has been mentioned, you are welcome to start using either ‘Birdies for Kids’ or ‘BFK’ if the acronym was included in the original mention.

Communication

- All communication for Birdies for Kids goes through the email birdies@shawcharityclassic.com or phone **(587) 293-4651**. Both of these communications methods are monitored by Lauren and other supporting Shaw Charity Classic staff members.
- Monthly newsletters will be sent out to all charities with updates and information on the program. As these develop we may be asking charities for content so stay tuned!
- The online forum is a second form of communication that we will be using in 2017. This forum will contain reminders, upcoming opportunities, FAQ’s as well as a place to network with other participating charities. This forum will be monitored by Shaw Charity Classic staff daily.
- If you are having any issues within the program please don’t hesitate to reach out to Lauren for help and support. No question is too small and we would rather you ask than assume. Your questions are extremely helpful in helping us make the program even better each year.

Social Media

- Twitter Handle: @ShawClassic
- Instagram Handle: ShawClassic
- Facebook: /shawcharityclassic
- Event Hashtag: #ShawClassic
- Birdies for Kids Hashtag: #Birdies4Kids (this is the hashtag to use in as many posts as possible)
- Website: shawcharityclassic.com

Wrap-Up Report

- At the end of the 2017 program we will ask all participating charities to complete a wrap-up report. This report will help us shape the program for the following year.
- Topics will include:
 - Charity Successes in 2017
 - Charity Learnings from 2017
 - Things that you think could be changed about the program structure
 - Suggestions for the Birdies for Kids / Shaw Charity Classic staff
 - Examples of promotional pieces you did for Birdies
 - This could include: screenshot of a donate button on your website, sample tweets, sample posters, flyers, etc
 - Analytics
 - We would like to get a sense of the reach of the program and impact on Alberta and the donors. This may include numbers from Google analytics, number of attendees at an event, a record of the number of impressions for each Birdies for Kids related Facebook post, or the number of likes/retweets on your top Birdies tweet.
 - A new metric that we would like all charities to track is the amount of kids impacted by the funds raised through Birdies for Kids. We would like each of our charities to track this throughout the year so that we can gather the most accurate number possible.
 - We would like to have you gather as much as possible for your various efforts and include them in the wrap-up report. This helps us generate sponsors for the matching pool leading to increase the monetary amount we can give to charities. It also helps us continue to run our tournament and show corporate supporters their impact throughout the community.
- We want to include this information now to give you a fair chance at collecting information throughout the year.
- If you have any questions regarding the best way to collect this information throughout the year please contact Lauren.

Contact Information

Shaw Charity Classic
Suite 1700 Bow Valley Square III
255 5th Avenue SW
Calgary, AB T2P 3G6
www.shawcharityclassic.com
(587) 293-4653 (office – main line)

Lauren Calvert
birdies@shawcharityclassic.com
(587) 293-4651 (direct)

Calgary Shaw Charity Classic Foundation
Registered Charity No. 827378977RR0001
Incorporated in Alberta



PRESENTED BY

