



Birdies for Kids: 2018 Program Outline

Contact:

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



PRESENTED BY  **ALTALINK**
A BERKSHIRE HATHAWAY ENERGY COMPANY



Program Overview: Table of Contents

1. 2018 Shaw Charity Classic Information
2. Tournament Charity History
3. Birdies for Kids: Program Overview
4. Charity Benefits
5. Charity Responsibilities
6. Shaw Charity Classic Responsibilities
7. Reconciliation
8. Application Guidelines
9. Application Process
10. Tips for Success
11. Timeline





2018 Shaw Charity Classic

Dates: August 29 - September 2, 2018

Title Sponsor: Shaw Communications

Location: Canyon Meadows Golf & Country Club

Field: 78 Professionals (minimum 50 years old)

Purse: \$2.35 million USD

Defending Champion: Scott McCarron

Broadcast: Golf Channel

Attendance: 42,500





Tournament Charity History

2013

- Inaugural Shaw Charity Classic brought to Calgary
- Contributed \$2.2 million to Southern-Alberta charities

2014

- Contributed \$2.4 million to Southern Alberta children and youth charities
- Set record for largest charitable contribution in Champions Tour history

2015

- 10 Official Charity Partners
- Introduced Birdies for Kids presented by AltaLink
- Raised \$2.3 million through Birdies for Kids, 89 participating charities
- Total charitable contribution of \$3.9 million

2016

- 9 Official Charity Partners
- Raised \$3.7 million through Birdies for Kids, 113 participating charities
- Total charitable contribution of \$5.2 million

2017

- 11 Official Charity Partners
- Raised \$6.9 million through Birdies for Kids, 159 participating charities
- Total charitable contribution of \$8.3 million





Birdies for Kids: Program Overview

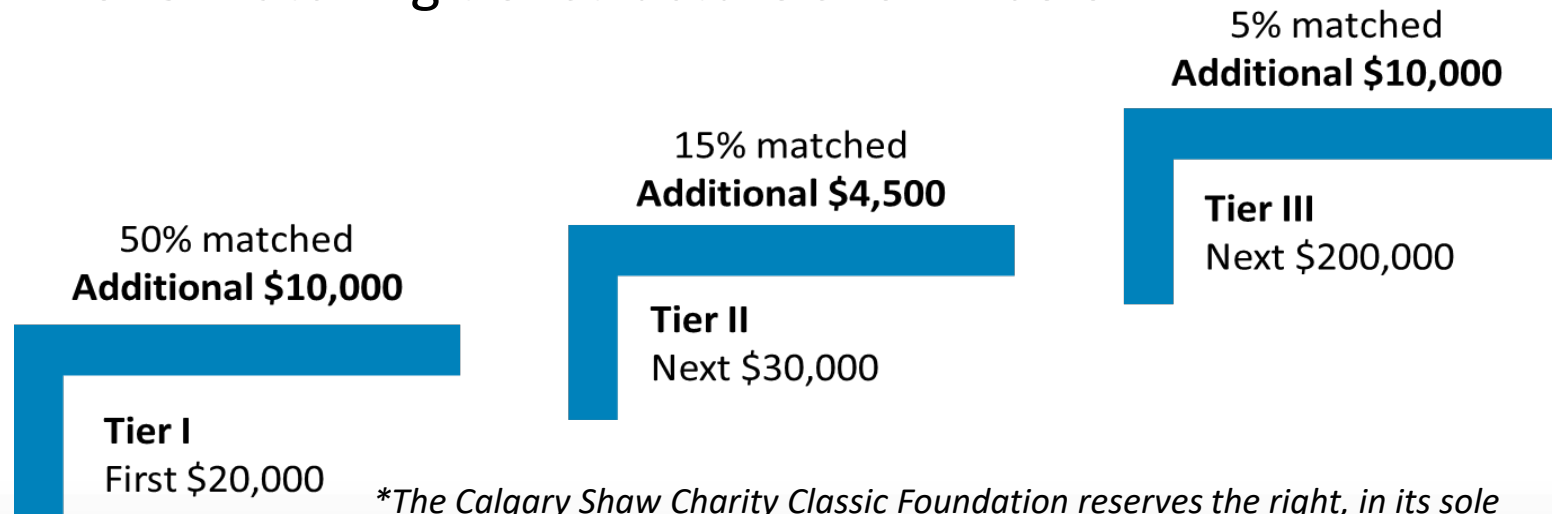
- Birdies for Charity; Started in 1971 at the John Deere Classic
- Introduced in 2015 to the Shaw Charity Classic to broaden the charity portfolio to include more charities across all of Alberta
- Charities generate contributions through flat donations or based on the number of birdies made by PGA Tour Champions players
- Participating charities solicit pledges from individuals and/or corporations
- Participating charities will receive **100% of EVERY DONATION** collected
- There are **NO COSTS** or **FEES** associated with participating





Birdies for Kids: Matching Program

- Most unique part of the program
- Generates incentive for giving
- Matching percentage will be based off collected amounts
- There is **NO** minimum amount that must be raised to receive matching
- 2018 matching tier structure shown below:



**The Calgary Shaw Charity Classic Foundation reserves the right, in its sole discretion, to substitute alternative matching percentages for those outlined above.*





Matching Program Examples

1. Charity 'A' raises \$2,500 through the Birdies for Kids Program
 - All \$2,500 is matched 50%
 - **Total cheque from the program 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**





Birdies for Kids: Charity Benefits

- **NO RISK or EXPENSES!**
- Charities receive **100% of all donations**
- Additional donation funds through matching program
- Online donation portal
- Use of official Birdies for Kids logo and trademark
- Individual charity name to be included on select Birdies for Kids partner recognition materials
- (4) Any One Day tickets for each charity
- Special pricing on tickets and hospitality packages





Birdies for Kids: Charity Responsibilities

- Each participating charity will solicit pledges from individuals and/or corporations
- 100% of the collected pledges will go towards the charity
- In order to be eligible for matching funds, all donations must go through the online donation portal
- Once all donations are collected, the matching amount will be determined and a final cheque will be written from the Foundation
- The more donations a charity puts through the program, the more matching funds we will distribute





Shaw Charity Classic Responsibilities

- Payment of all fees associated with the program
- Collection and record keeping of all donations
- Website and database management
- Invoicing and tax receipt distribution
- Promotional materials including pledge cards
- Support for individual charities soliciting donations
- Sending out monthly updates to all participating charities





Birdies for Kids: Reconciliation

- Payment occurs to the 'Calgary Shaw Charity Classic Foundation'
- Donations are charged immediately (credit card or invoiced)
- Cash, cheque, or credit card are all accepted
 - Donations over \$1,500 will be accepted by cash or cheque
- Payment to charities will take place on a rolling basis
 - A cheque can be requested when over \$5,000 in flat donations have been accumulated by a charity by filling out the cheque request form
 - All matching funds will be paid out in the Fall of 2018
- Cheques from the charities bank account **will not** be accepted without the proper proof of donation solicitation





Birdies for Kids: 2018 Eligibility

1. Canadian registered charity in good standing

2. Have a program that focuses on children and youth in Alberta

3. Programs and services are provided directly by the charity



2018 Birdies for Kids Charity Application Guidelines

In an effort to ensure Birdies for Kids presented by AltaLink and the matching program are put to their most effective use, we have established guidelines for participating charities. We look forward to creating long-lasting partnerships with each charity involved by having charities engage with the Shaw Charity Classic, and simultaneously help us deepen our understanding of the charity's programs. Please review the guidelines below to determine if your organization is eligible for the program.

Your organization must:

1. Be a Canadian registered charity in good standing
2. Have a program that focuses on children and youth in Alberta
3. Programs and services must be provided directly by the charity
(i.e. Charitable program spending must be greater than \$0, gifts to other charities does not qualify as program spending)

Outside of the above criteria, priorities used in selecting Birdies for Kids charities include:

1. Management and mission effectiveness
2. Over 70% of total expenses spent on charitable programs (spending ratio)
3. Room for additional funding and plans for growth
4. Highly transparent
5. High likelihood to achieve sustainability beyond our involvement
6. Strong commitment to Birdies for Kids fundraising goal (there is no ideal goal as each organization is unique)

Lastly, participating charities will be chosen with the intention of creating a diverse program of charities that serve all areas of Alberta as well as a wide range of demographics.

Organizations excluded from consideration:

1. Any charity that raises less than \$100 for two consecutive years will be placed on probation for one year. After a year of probation the charity can reapply for the program. Charities that raised less than \$100 in 2016 & 2017 will not be considered for the 2018 program.
2. Religious organizations
3. Political parties or candidates
4. Educational institutes
5. Third-party fundraising endeavours
6. Organizations focused on the advocacy of a particular religious or political point of view
7. Organizations that do not directly provide programs or services

Please note: Charities that meet all criteria in this document may still not be accepted due to program fund limitations. However, each year applications will be reviewed for new charities so please submit an application for next year if you are not successful.





Birdies for Kids: Application Process

- **Applications are due January 5, 2018 by 5 PM MT**
- Please ensure to fill out all sections of the application
- Please realistically look at what resources you may be able to put towards this initiative before setting your goal
- All charities will be notified of their application status in January





Birdies for Kids: Tips for Success

- Get others on board (board members, staff, volunteers)
- Face to face meetings with new and existing donors have proven to be very effective
- Look into how the program can be integrated into new and existing events
- Eblasts, newsletters, flyers, social media are all great for mass awareness
- Add the Birdies logo with a donation button to your website
- Come to the tournament and host existing, new and potential donors as a way to create on-site awareness
- Use the tournament staff as support
- Ensure to read all communications sent out by Shaw Charity Classic staff to ensure you are up to date on all information and deadlines





Birdies for Kids: 2018 Timeline

- Monday December 11 - **Charity Applications Open**
- Thursday December 14 - **Teleconference Presentation**
- **Friday January 5 at 5 pm MT - Application Deadline**
- Friday January 19 - **Charities are Finalized¹**
- February 1 – September 2 - **Donation Period²**
- September 21 - **Collection Period Ends³**
- Fall 2018 – **Final Cheques are Sent Out**

1- Once all applications are received, we will determine how many charities we are able to accept based on our funding and goals outlined in applications

2- All donations must be entered through the online portal by Sunday, September 2.

3- All funds must be received by Friday, September 21 in order to be eligible for matching funds





Birdies for Kids: Program Contact

For program assistance, please contact:

Lauren Calvert

Tournament Coordinator

(587) 293-4651

birdies@shawcharityclassic.com

Office Address:

1700 Bow Valley Square III

255-5th Avenue S.W

Calgary, AB, Canada T2P 3G6

