



# 2019 Birdies for Kids Program Manual

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All Birdies for Kids documents and updates are available at  
[www.shawcharityclassic.com/bfkdocuments](http://www.shawcharityclassic.com/bfkdocuments)

Password: birdies

## Background Information

### Tournament

- Purpose: The Shaw Charity Classic aims to bring much needed dollars to local youth charities, while providing Calgary with a world-class professional sporting event accessible to families.
- Date & Location: August 28 – September 1, 2019 | Canyon Meadows G&CC
- Title Sponsor: Shaw Communications
- Patron Group (Tournament Owners):
  - Jim Riddell, Tournament Chairman
  - Allan Markin
  - Guy Turcotte
  - Keith MacPhail
  - Gary Peddle
  - Michael Culbert
- Event Management Team | Launchpoint Sport & Event Strategies
  - Sean Van Kesteren: Executive Director
  - Rhys Royer: Sales Director
  - Lauren Calvert: Stakeholder & Marketing Manager
  - Erin Strate: Sales Manager
  - Shannon Edwards: Partnership Manager
  - Mitch Lagadin: Tournament Manager
  - Geoff Edwards: Operations Manager
  - Victoria Murray: Office Administrator
- Sport Governing Body: PGA TOUR Champions, subsidiary of PGA Tour
- Field: 78 Professionals (minimum 50 years old)
- Purse: \$2.35 million USD
- Defending Champion: Scott McCarron
- Broadcast: Golf Channel
- Attendance: 45,000 (2018)
- Awards: Champions Tour President's Award (2014, 2015 & 2017), 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.
- 2017: Raised \$6.9 million through Birdies for Kids presented by AltaLink for a total 2017 tournament charitable contribution of \$8.2 million.
- 2018: Raised \$11 million through Shaw Birdies for Kids Presented by AltaLink for a total 2018 charitable contribution of \$12.3 million and \$34 million since 2013

## Program Summary

- 2016 Birdies for Kids:
  - 113 Participating Charities
  - 1,600 Donors
  - Total raised: \$3.7 million
- 2017 Birdies for Kids
  - 159 Participating Charities
  - 2,400 Donors
  - Total Raised: \$6.9 million
- 2018 Birdies for Kids:
  - 182 Participating Charities
  - 3,127 Donors
  - Total raised: \$12.3 million
- 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.
- 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) 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
  - Invoicing and tax receipt distribution (please see full details in the reconciliation section of this document)

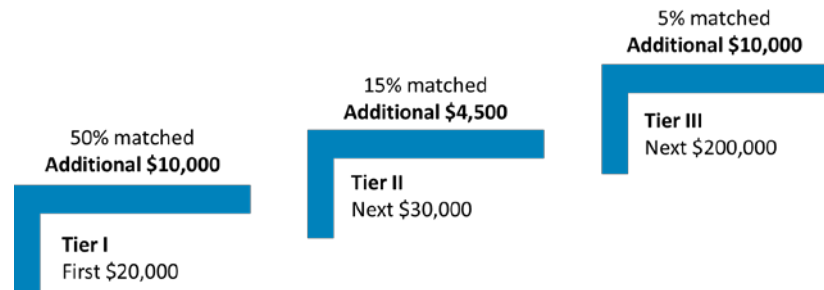
## Pledge Solicitation

- 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.
- BFK 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 Birdies for Kids staff and they can help brainstorm ideas or see something from a fresh perspective.
- **Ideas for leveraging Birdies for Kids**
  - **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.
    - If you know any golf fans that are donors it is a great opportunity to engage them. 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. If you have a particular company or donor in mind, reach out to BFK staff and they can let you know if they are involved in the tournament already.
  - **Corporate Partnerships**
    - In the past, we have had charities partner with corporate organizations that held employee fundraising events such as "wear jeans to work day" or sports leagues jerseys. 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.
  - **Fundraising Events**
    - Charities have used this opportunity to host their first ever fundraising events. 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, using one of our mobile pay terminals, 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 2018:
      - Golf Tournament
      - Bottle Drive

- Gala
  - Stampede Breakfast
  - Poker Tournament
- **Golf Tournaments**
    - Some charities have hosted golf tournaments and sold mulligans, or entries into contests during the tournament.
    - Simply incorporate the BFK logo into tournament collateral, and all funds can be submitted through the program.
  - **Email Campaigns**
    - 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. Bonus – running the donations through our online portal saves you credit card fees and time!
  - **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.
  - **Donation Form**
    - Keeping hard copies of the brochure in charity offices, at events, or using them as mail outs are very helpful! The brochures contain all of the information the donor needs and they can be sent directly to our office. Please email [birdies@shawcharityclassic.com](mailto:birdies@shawcharityclassic.com) to request manual donation forms.
  - **On-Site Presence**
    - 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 us.
  - **Solicitation Letter**
    - Similar to previous years, 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 online at <https://shawcharityclassic.com/bfkdocuments/> Password: birdies

## Matching Program

- Matching is based off collected amounts for each charity, and all matching funds will be paid out in November of 2019. We will use your help if needed to collect as much as possible in the weeks after the tournament.
- 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 2019 matching tier structure has not changed from previous years and follows a reverse income tax structure:



- In 2019, the Calgary Shaw Charity Classic Foundation will distribute a matching pool maximum amount of \$1,200,000 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 \$1,200,000 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.
- Example  
A Charity 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

In an effort to create more transparency and improved efficiency with the program, all personal information that a donor provides will be shared with their selected charity. The donor can choose one of the following options:

- **I agree** that my contact and personal information may be provided to the specific charity I designate for the purposes of having the specific charity send a thank you for my donation and recognize my donation publicly by the specific charity I select in their promotional materials. **This does not allow the specific charity to contact me regarding commercial purposes without further consent.**

**If a donor selects I agree**, the selected charity has the right to contact the donor and thank them for their donation. The charity also has the right to publically recognize the donor on donor recognition materials. However, this does not mean the donor has opted into any of the selected charities mailing lists or other commercial uses.

- **I do not agree** to my contact information being used for the purpose of sending a thank you for my donation or for my name being recognized publically in any manner. I wish to remain anonymous on all recognition material.

**If a donor selects I do not agree**, the selected charity will still be able to see the donors name and personal information however, the selected charity does not have the right to contact the donor, publically recognize the donor on any recognition material or use their personal information for any purpose.

- **All charities will need to sign the donation consent wavier** before they will be provided with the online portal login to see donor information. If a charity misuses a donor's personal information, they will be expelled from the program effective immediately.
- 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.

### Ways to Donate: Donation Form

- Manual pledge forms are available for all charities by request. 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. 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 via donor reports once collected.
- 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 **'Calgary Shaw Charity Classic Foundation'** and included your charity name in the memo.
- If your organization would like to create your own manual pledge forms, you are welcome to do so, however please include your charity name, and all of the donor information fields that are on our pledge forms.

### Ways to Donate: Online Donation Portal



- **Donors can donate one of two ways online:**
  - First is through the main donation link on the Shaw Charity Classic website: [shawcharityclassic.com/donatenow](http://shawcharityclassic.com/donatenow) and the donor simply picks the participation charity from the drop down menu that they wish 100% of their donations to go to.
  - Second is through your charity's personalized donation page. All participating charity pages can be found at: [shawcharityclassic.com/donate](http://shawcharityclassic.com/donate) then utilizing your specific webpage address when connecting with donors, for example, through social media or linking on your charity's webpage. We recommend this option to help reduce donor donation mistakes when using the drop-down feature within the first option. You may email [birdies@shawcharityclassic.com](mailto:birdies@shawcharityclassic.com) with your organization's logo, mission statement and contact information, to personalize your page. Also, if you have a specific event you want to showcase, the BFK staff can temporarily update your page.

## Reconciliation

- **Timing**
  - Credit Card donations are charged immediately
  - If a donor selects, invoice me by email, an invoice will be sent within 3 business days
  - Each Friday donations from the previous week will be viewable on the donor reports. Unfortunately we are unable to update this information more frequently and during August there may be a longer waiting period due to the high volume of donations received.
- **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 tax receipt.
  - If a donor asks, please let them know that tax receipts will be distributed throughout the year, with all receipts being issued by November 29, 2019.
  - 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'.**
  - *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 Victoria before you send in a charity cheque to ensure correct submission.**
    - 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 BFK staff for approval and they 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 the attention of the Shaw Charity Classic. Please note that since no tax receipt is issued, individuals only need to fill in their name and payment information.
    - 2) Charities are welcome to bring up our online donation portal for silent auctions. Please speak to Birdies for Kids staff **before** the event so that they can turn off automatic tax receipts for the evening of the event. Bidders can fill out their personal information and credit card information and have the online system process their payment immediately. Since the sales receipt will be emailed to them immediately, you will be able to provide them with the item that evening.
    - 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 these portals so that we can arrange a convenient pick up time.
- **Payout Schedule**
  - Once a charity has over \$5,000 in flat donations a cheque can be requested by submitting the cheque request form to BFK staff.
  - Once the 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 request will take is six weeks.
  - All matching funds will be held until the end of the program year in November of 2019.
  - A charity can only submit 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, 2019 – September 1, 2019: Donation Period
  - September 20, 2019: Collection Period Ends
  - November 2019: Final Cheques are sent out
    - This cheque includes any remaining flat donations that have not been requested, and matching funds.
  - All donations must be submitted to the Shaw Charity Classic by September 1, 2019. Donations that have not been submitted through the online portal (either by credit card or select invoice me by email) will not be eligible for matching funds. There are no exceptions to this for 2019.

## Rules & Regulations

1. Charities may notify their constituents via normal communication (ie. 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 Friday, February 1, 2019 and the donation cut-off date is Sunday, September 1, 2019 at 11:59:59 PM MT. Please mail or drop off all pledge forms collected within those dates to:
 

Shaw Charity Classic Attn: Victoria Murray  
Suite 1700 Bow Valley Square III  
255 – 5<sup>th</sup> 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. In the case that funds have been paid out and a donor to your charity requests a charge back, the charity will be required to pay back the funds being disputed.
8. Charities will be required to sign off on a final donor list stating that all information and donations are correct to the best of your knowledge. Funds will not be released until this list is signed off on.
9. 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.

10. In 2019, the Calgary Shaw Charity Classic Foundation will distribute a matching pool maximum amount of \$1,200,000 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 \$1,200,000 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 Birdies for Kids staff prior to use. On your submission email please include the date you need approval.
  - There is one BFK logo, provided to you in different file formats. Please use the appropriate file format for your particular marketing materials.
  - The program is called 'Shaw 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 'Shaw 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 documents and updates will be available at [shawcharityclassic.com/bfkdocuments](http://shawcharityclassic.com/bfkdocuments) Password: **birdies**
- All communication for Birdies for Kids goes through the email [birdies@shawcharityclassic.com](mailto:birdies@shawcharityclassic.com) or phone **(403) 268-3940**. Both of these communications methods are monitored by Victoria 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 and provide opportunities to get involved with the tournament so stay tuned!
- If you are having any issues within the program please don't hesitate to reach out to Birdies for Kids staff 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.

## Wrap-Up Report

- At the end of the 2019 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 2019
  - Charity Learnings from 2019
  - Suggestions for changes in the program structure
  - Suggestions for the Birdies for Kids / Shaw Charity Classic staff
  - Examples of promotional pieces you used for Birdies
    - This could include: screenshot of a donate button on your website, sample tweets, sample posters, flyers, etc
    - We share these examples with both Shaw and AltaLink, so the more you share, the better!
  - 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.

## Contact Information

Shaw Charity Classic

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255 5<sup>th</sup> Avenue SW  
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(587) 293-4653 (office – main line)

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birdies@shawcharityclassic.com

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



@ShawClassic

Sponsor Accounts: @AltaLink @ShawInfo

Hashtags: #Birdies4Kids, #ShawClassic

Website: shawcharityclassic.com