

SPORT BC PROFESSIONAL DEVELOPMENT PRESENTATION
PHILANTHROPY. THE POWER TO TRANSFORM. APRIL 19, 2011

FORMAT:

1. Welcome; introductions and introductory remarks[5 minutes]
2. PART I [70 minutes]
 - a. **Success stories** [40 minutes]
 - i. **Carlene Lewall.** Delta Sport Development Centre. Director of Marketing, Communications & Fundraising. Delta Gymnastics
 - ii. **Wayne van Osterhout.** Co-Chair One4All Elk Lake Boathouse Renewal Campaign. Retired school principal
 - iii. **Carole Walkinshaw.** Founder – First Fund For Gold. Businessperson
 - iv. **Chris Spicer.** Founder – 20-20 Club. President. CWRFC
 - b. **Panel discussion/Q & A** [15 minutes]
 - c. **Threads of Success** [10 minutes]
3. BREAK [10-15 mins]
4. PART II [60+ minutes]
 - a. The Sport Advantage in Philanthropy[CS. 12 – 15 mins]
 - b. Sport BC – a brief history of philanthropic leadership [M. Gookstetter]
 - c. **What do you need? How do you see Sport BC aiding you in this?**[Tim & Chris B leading this discussion.]
5. PART III [45 minutes]

Windup – Parking Lot Review – Next Steps

- a. Item by item from parking lot
- b. Around the table for rx of participants (1 minute – comments recorded)
 - i. 1 comment + (“1 thing I found good about this session was...”)
 - ii. That was helpful **but**
- c. “Ask the Experts” opportunity. E.mail questions in to Moira & Chris / leave them here and we will get back to you by April 29 and respond to them all and broadcast to all of you. Is this a regular blog?
- d. Where from here?
- e. Thank you & final comments.

Delta Gymnastics Society – Our Story

Carlene Lewall

A 35 year history beginning with 30 summer students participants in a small auxiliary gym at the local Junior High School to 45000 participants who maximized the capacity of a 7,200 sq foot gym at the South Delta Recreation is now (as of this week) at 22,000 sq. foot facility that will be able to accommodate up to 10,000 participants.

Capital Campaigns:

-Our very first campaign was to buy our first set of uneven bars – in 1977 fundraising \$5,000 seemed like a lot. From then on we continued to fundraise for equipment.

-We needed our own dedicated gym – In 1985 we began this campaign and after years of lobbying and raising \$300,000 we moved into the gym at the South Delta Rec Center in 1993

-Our participating numbers doubled that year and continued to grow – we knew we needed more space. In 1996 we began our expansion campaign first with the idea of a small addition but that soon turned into one that would almost double the size. We began to once again fundraise. In June 2002 Delta Parks and Recreation Commission approved our expansion and we felt very positive that this would pass through Delta Council. Unfortunately 5 days later the gym was destroyed by an arson fire.

-2002 began our second major campaign – now it was to replace the equipment that was destroyed – goal of \$300,000. Our dream of a bigger gym literally went up in flames. This was fairly easy campaign as it held 'sympathy'.

-By 2004 we came back to our goal of expansion. It was a long journey but we did it and on Sunday we opened – 22,000 sq. foot building with a gym of 15,500. Our contribution to the corporation and to buy our equipment has been \$1,600,000.00

How did we do it?

Perseverance

Believing

Passion and most important was passion

But of course there is much more

What is important before you begin a Campaign

- ✓ Have a consist and strong philosophy to your organization
 - Make sure that everyone in your organization buys into this philosophy
 - This will include value statements that again everyone believes
- ✓ Set goals for your organization – 5 year and yearly and review them
- ✓ Name, Logo and Motto – must stay the same over time
- ✓ You need to be respected in your community

How did we do it?

- ✓ Community Buy in
- ✓ Life before and after 2002
- ✓ Sport is not considered a cause and you must find a way to communicate it to be a cause.
- ✓ Persistence
- ✓ If you believe in what you are doing, don't ever give up
- ✓ Take advantage of every possibility

For us our campaign there was 2 parts

1. To get community buy in so that we could build
2. Fundraising the money

So, let's say you have your location, support from your city / municipal council. Now we have to raise the money...

1. Feasibility Study
 - a. know what you want to do will be feasible
 - b. Is the goal attainable for your community
2. Build a Campaign Team
 - a. One with those who are well connected, has dedicated people, experience, a good leader,
3. Case Study
 - a. write a case – one that works in your community
4. Campaign Plan – that includes
 - a. Guiding Principles
 - b. Leadership Plan
 - c. Case of Support
 - d. Prospects
 - e. Implementation
 - i. Gifting groups – job descriptions
 - ii. Communication and Marketing
 - iii. Recognition
 - iv. Stewardship
5. Set time lines

Work Hard, Don't ever give up

Take advantage of every possibility and don't take no from anyone

How it could be easier – What would help you!

If the general public would realize the importance of sport

- ✓ The advantages of sport are far beyond kicking a ball, or swimming lengths in a pool

Tax Receipts

Sport organizations need to be able to issue tax receipts.

To work with others – join other sports or other organizations.

- Let not all work alone
- Join forces in your community
- Do you have a Sport Council?

Sport Philanthropy - My Story

Rowing – Wayne van Osterhout

Background

In Victoria the VRS (Victoria Rowing Society) presides over four member groups at the Elk Lake Boathouse. The groups are; Victoria City Rowing Club, University of Victoria, (original two member clubs) Greater Victoria Youth Rowing Society and Rowing Canada Aviron. The RCA contingent is the men's' national team heavyweight program and the men's' lightweight and development programs.

The Boathouse was built in 1986 and contained five boat bays (one of which was a boat repair bay), two long lakeside docks, two lounges and one office. Also in the boathouse are two washroom/change room/shower rooms.

By 2006, the boathouse was overflowing with rowing shells. The number of athletes using the facility exceeded one thousand persons each year. Each of the partners needed more space and upgraded facilities. The VRS decided to embark on an expansion plan.

The first stage, and probably the most difficult stage was developing the plan and then getting the approval to proceed. The president of VRS made many presentations to the various local governments: Saanich Municipality, the Capital Regional District and the Provincial Government to gain approval. Various environmental impact studies were conducted. Assurances were made, and finally approval was given to proceed despite objection from another lake user group.

Initially a fundraising project was attempted but fell flat. In 2009 the VRS undertook to hire a fundraiser who started by conducting a survey to test the rowing community in Victoria to determine if there was enough support to conduct a campaign. The survey result was positive and the campaign was approved in May 2009.

The Goal

1. To raise \$1,100,000 to expand the boathouse

- An increase in boat storage capacity
 - A large multipurpose room for training and meetings
 - A new boat repair shop and new washroom structure

In May of 2009 two individuals were approached to co-chair the campaign. A committee structure was agreed to that had representation from all four user groups. Two former Olympic gold medal winners were added to the board as honorary co-chairs. Two additional members were added to head up communication and the corporate sector. One member from VRS was invited to sit on the committee to report back to the VRS board.

The fundraising group met twice a month starting in June of 2009. We brainstormed various ideas and developed an approach for the project.

Hurdles to Overcome

The Rowing Community had never been approached to support a campaign of this nature. We knew there were hundreds, if not thousands, of former rowers who might support the campaign. Our first hurdle was finding them. Each organization helped to develop a list of possible contributors. There was some reluctance by the University to share its list because it was going to begin its own fund raiser on the campus. Eventually a list was shared with us, but many of the addresses were out of date. The other members were very forthcoming with their constituents.

The next hurdle was developing a mechanism to receive gifts. We chose the NSTF (National Sport Trust Fund) because it allowed contributors to receive a tax benefit for each gift. It also provided an excellent accounting process for gifts that arrived by cheque or credit card and for gifts that arrived over an extended pay out period.

To draw the attention of our potential contributors we developed a number of smaller initiatives within the overall campaign. One of the initiatives was to give groups naming rights to various parts of the building. Another initiative targeted groups of former athletes to reach a specific amount of money. A third initiative focused around a ticket selling campaign which had a racing shell as its prize.

Early in the campaign we became aware of an opportunity for us to apply to the Federal Government for a RInC grant. (Recreation Infrastructure Canada) .We were “shovel ready” with the project but to apply for a grant you have to have equal money. We were able to convince our rowing partners to guarantee an amount of \$550,000 to the campaign. On that basis, and through the good work of the committee and the head of VRS, we were given a RInC grant of \$550,000 for the campaign. Our undertaking with our guarantors was that we would raise the funds so that they would not have to follow through on their promissory notes.

The campaign was successful as it raised almost \$700,000

HE FIRST FUND FOR GOLD – C. WALKINSHAW & M. GELUCH

GRASS ROOTS GOLD!

Background:

- Couple attends a Ballet BC event and hears of the financial plight of Canada's Winter Olympic hopefuls (2006). That evening they commit to doing something to help. He a retired Golf Course Executive, she a Financial Manager for a number of Vancouver businesses
- Decide to raise at least \$10K/year for a Winter Games hopeful. Enter PacificSport – CSCP

Process:

- Confirm a name that does not conflict with 2010 Games word protectors
- Gather group of friends & colleagues to inspire/engage
- Request a 4 year donation commitment. 50% to be given to the selected athlete; 50% to initiate a future focused athlete endowment
- Athlete selection committee worked with PacificSport to select a *Winter Games athlete who had the potential to represent Canada in 2010 in the Vancouver Games*. We were looking for an athlete from a modest means family, in an unfamiliar sport that is not heavily supported. Megan Tandy, Biathlete from Prince George is selected. It was our feeling at the time, that so many of the CAD team were athletes from family's who could afford to send their children, and we wanted to help a young person from CAD real talent pool.
- Meet the athlete reception held at Carole & Michael's home. Investors attend and are galvanized by this young woman. Interest grows & deepens
- Original group of 12 investors grows to almost 4 times this number. Annual donations range from \$100 up to \$3,000 by 2010.
- PacificSport managed the financial aspect –charitable donation receipting; reporting; first stage donor acknowledgement. FFFG leaders managed donor stewardship and continuous engagement (signing/re-signing annual support; periodic e-newsletters; personal contact; receptions)

Outcomes:

- Megan Tandy from Prince George became THE face of the 2010 Winter Games for this increasingly keen & committed support group
- Megan received close to \$10,000 every year for training & competition in cash, and more than 10K when gifts in kind are added to the total. Gifts such as custom eyewear for shooting in sunny conditions, glare etc., clothing, luggage, nutrition counseling, motivation, and dental care.
- Megan participated in competitions and camps domestically and internationally that she was not funded for by Biathlon Canada. Her domestic and international results improved every year. From a distant school aged hopeful she became the BEST Canadian Biathlete at the 2010 Games. Many stories here
- The investor group helped with cash support PLUS major emotional support; equipment support (gun; specialized competition lenses; transportation...) Megan told us many times, the emotional support, the e-mails from the members, the coffee clutches etc, made her want to do better, so as not to let us down. It gave her a larger sense of pride in what she was achieving, and a bigger dream/goal of what she needed/wanted to achieve. Megan more than surpassed all her goals and all the expectations of every member of the FFFG.
- The NSO became very aware of this grass roots support group and attempted to harvest the group (but not until Megan became successful)

Key points:

- Grass roots support for athletes is RIGHT THERE
- There MUST be a leader to achieve success
- Partnerships Provide Possibilities
- Geography does not have to be a factor as we had two donors from Ontario in the group who donated every year for 4 years.
- Stewardship maintains/deepens engagement
- This **can** give immediate and long term satisfaction to investors and athletes. Members wrote to Megan directly and followed her career directly through our newsletters and Megan's website. In the end, the most common comment that was received, was that many of the people in the group, had no children, and so had never had, or would never have had an opportunity to live the dream of/ along with a young person; and see, that dream to come true. It is an intangible that brings goose bumps, as the thank you. A far better gift than a thank you note. It is a gift of giving that brings pride and a sense that what you have donated has truly made a difference for today, for tomorrow's community leader, for her family; the list is endless.

THE CW 20 CLUB [CSPICER] 10 minutes

- Board member – now President
- Club budget of ~\$150,000/yr
- Every year bringing in the budget with a host of initiatives anchored by an annual dinner and sponsorship
- Close to zero base and re-start every year
- **GOAL**
 - Convince Club executive of wisdom of endowment fund development & how to manage it
 - Once above completed, begin task of raising the funds and creating awareness and pathway to giving
- **Steps Taken:**
 - Lead by example. CS the first donor of \$20/month; need a deliberate focused leader
 - Seek partnerships. Canadian Rugby Foundation & matching donor
 - Gather key folk early to make commitment
 - Focus on long term
 - One on One solicitation
 - Seek opportunities all the time
 - Communicate/steward existing donors; elicit their help in engaging others
 - Report out a few times every year on fund progress
 - Initiated planned giving component
 - NEVER DONE
 - FUND STATUS:
 - Initiated April, 2007. As at April, 2011, 34 individuals on board. Fund = \$41,000
 - 7 of these individuals have committed an Estate Gift as well
- **Hurdles:**
 - Mistrust
 - Poverty
 - Time
 - Executive belief-commitment
- **Key points** (in addition to above)
 - NEVER NEVER NEVER GIVE UP
 - PEOPLE HAVE GOOD INTENTIONS BUT NEED GENTLE AND CONTINUOUS PROD UNTIL either THEY SAY STOP or THEIR GIFT IS RECEIVED
 - FOCUS ON THE CAUSE-THE FUTURE PICTURE THIS FUND WILL SUPPORT
 - THANK YOU & RECEIPTING. TIMELY AND SINCERE.

THE SPORT ADVANTAGE IN PHILANTHROPY

- Philanthropy as an emotional commitment
- Sport leadership as one of the biggest Canadian volunteer realities
- Sport has THE POTENTIAL to be a lifelong engagement [participant-coach-leader-spectator-supporter-participant-family cheerleader]
- Every sport starts with a defined group – and this group can grow with a little attention
 - Registrants
 - Their families
 - The coaches and volunteer leaders
 - The spectators
 - The alumni & their circles of connection
 - The community
- Sport can be honestly & positively portrayed in a number of ways:
 - Preventive health activity
 - Pursuit of excellence
 - Active & Healthy Communities
 - Stress reduction; weight reduction; positive mental health
 - Role modeling; life skills; job skills
- Sport has very rarely engaged its constituents, consistently & with a plan from a philanthropic perspective
- Sport(particularly amateur sport) is highly networked, connected, positively perceived, discussed/topical
- Other sectors have been at this for years (illness; education; religion;) but NOT sport-health. Yet we have the greatest potential.