

Planning a Successful Third-Party Fundraising Event

The Edmonton Rowing Club has hosted a very successful Corporate Challenge event since 1996. Connie Phillips and Tim Smith did a presentation on the event at the 2002 RCA AGM in Winnipeg. Tim was instrumental in the success of the event from 1996-1999, and Connie, who is currently the President of ERC, was the Corporate Challenge Director in 2002. This document combines the content of the presentation and a handout that was provided at the AGM.

In 1996 the Edmonton Rowing Club was looking for a way to raise funds. We had heard about the concept of “Corporate Challenges”, and decided to give it a try.

The Winnipeg Rowing Club shared their Corporate Challenge template with us, and we modified it to meet our requirements. We invited Coopers & Lybrand (who, at the time, was a sponsor of the National Team) to partner with us. We also invited C&L to select a charity they’d like to support as part of the Regatta – they selected the Cross Cancer Institute in memory of one of their partners who had recently lost his battle with cancer.

“The Richard Nuxoll Memorial Regatta is the top third party fund raising event in all of Alberta for the CCI/ACF, raising almost as much as all third party events put together in Southern Alberta!”

- Jane Weller, Alberta Cancer Foundation/Cross Cancer Institute

Funds Raised for the Cross Cancer Institute/Alberta Cancer Board

1996	\$ 22,000	Confocal Microscope
1997	\$ 21,000	Research Equipment
1998	\$ 44,000	Gene Analysis Lab
1999	\$ 64,500	Tomotherapy
2000	\$ 87,000	Centre for Biological Imaging & Adaptive Radiotherapy (CBIAR)
2001	\$ 90,000	CBIAR
2002	\$112,000	PET Scanner Program

TOTAL

\$440,000

OVER 7 YEARS!!!

The Vision:

Corporate teams participating in a learn-to-row program, culminating in a fun regatta, in support of both the Rowing Club and a selected Charity.

Purpose:

To raise funds for a Charitable Organization;
Community Service;

To raise awareness of rowing in the community;

To raise funds for the Rowing Club, and build Rowing Club membership.

Hosting a third party fundraising event is a very rewarding undertaking. It requires organization, partners, volunteers and time. While the main benefactor of these events is, obviously, your chosen charity, the Rowing Club does make some money, and gets a ton of exposure, publicity, and – more members! Once you've determined that you really want to present this event, and that you really have the resources to be able to pull it off successfully, here are some guidelines you can use to make it happen.

Pre-Planning – Getting Started

Eighteen Months Prior:

- Determine what your club wants to get out of this event. Are you trying to promote rowing? Raise funds for the club? Develop new programs? Support charity and contribute to community service?
- As a club, generate a list of potential Corporate Partners. Meet with them to determine if they're interested and if their goals align with yours. Choose your partner based on the "best fit".
- A hint: Your Corporate Partner's client list is a great place to start to find people to participate in your event.
- Together with your Corporate Partner, go through the same process to select a charity you'd like to support with your event.

Twelve Months Prior:

- A representative from the Corporate Partner, the Charity Partner and the Rowing Club will form your core organizational team, which will act as the key planning team for the event as well as the liaison between the partners. Select these people carefully! They're the key to your success.
- One of these people has to be the "chair"; we recommend that it be the Rowing Club person. It's now time to set up a meeting with the partners and determine the roles that each partner will perform.

An important word about roles: Roles should be determined based on the tasks required to host a third party fundraising event AND a regatta. Some tasks will require the input of all partners; others are best handled by only one of the partners. In some cases, determining who should handle what tasks will be obvious. What is imperative is that ALL partners understand the roles and tasks expected of them. Communication is key!

Ultimately, since the rowing club provides both equipment and venue, once roles are determined, it is important for the rowing club to ensure that the time and infrastructure is in place or available to host the event. The rowing club needs to determine its capacity (and therefore the number of participants) to handle both training of teams and hosting the regatta. This information must be communicated back to the partners.

Here are some example roles:

- The Rowing Club will host the regatta and perform all the related tasks (supplies, people, equipment, coaches, training, water, good weather...);
 - The Corporate Partner handles administrative functions, recruiting of corporate participants, host the post-race award ceremony and meal, cover the cost of medals and event day food, helps with media relations to raise the profile of the event...;
 - The Charity Partner runs a silent auction, collects the pledges, helps with media relations.
- Establish target participants for the event (i.e. youth rowing event, corporate rowing event, etc.).
 - Set a date and determine your program (what your event will include, i.e. kick-off party, Carbo Load party the night before the event, regatta, post-regatta award ceremony and meal; silent auction...).
 - Each partner should work to estimate their costs, based on their roles, and prepare a budget.

“The thought of raising money for a worthy cause is one of the driving forces for my participation in the Richard Nuxoll Memorial Regatta. I have always enjoyed watching the 8’s at the Olympics and the thought of being in one sounded great (although I am sure that we look better in my mind than in real life)...”

- ***Kevin Swallow, Alberta Agriculture, Food and Rural Development (regatta participant)***

Planning the Actual Event

(This sample event planner is modeled after the one used for the ERC’s 2002 Corporate Challenge, and it is based on the role of the Rowing Club partner only).

Eight to Ten Months Prior:

- Begin regular meetings with Corporate Partner and Charity Partner. Fine-tune the event structure and review each Partner’s role and responsibilities.
- Determine the “rules” of your program (i.e. “Entry fee for a crew of eight: \$1,000. This includes 6 training sessions, tickets to the post race event, a T-shirt and a minimum of two races on race day. Crews must be mixed men and women. Crews are also required to raise a minimum of \$1,000 for the charity.”).
- Begin to contact and recruit potential participants.
- Advertise, advertise, and advertise! Prepare and distribute brochures, entry forms and pledge sheets.
- Determine what other organizations or groups need to be involved in the organization of the event and bring them into the planning at the earliest possible point.

- Example: Where will the event be hosted? City parks may require permits, proof of insurance and other information. They may also have restrictions on noise level, alcohol permits and parking.
- Arrange for locations and caterers for your post-race award ceremony and meal, pre-race Carbo Load meal and the Kick-Off party.

Six Months Prior:

- Actively recruit participants.
- Have information about the event, complete with entry forms and pledge sheets, posted on the Rowing Club web site.

“...Fundraising through sport adds value to all who participate, spiritually, mentally and physically. The team sport of rowing should be promoted further across Canada as one of the primary fundraising platforms for charitable organizations.”

- ***Scott Matheson, PCL Constructors Inc. (regatta participant)***

Five Months Prior:

- Review your club's equipment needs with Equipment Rep and Head Coach:
 - Coach boats and motors
 - Available 8+ 's for training
 - Available 8+ 's for race day
 - Adequate complete sets of spoon oars available for training and race day
 - Boat repair person available for the duration of training and on race day
- Set practice start date and practice times, in consultation with the Head Coach.
- Begin recruiting coaches.

“TD Commercial Banking has participated in this corporate challenge regatta since its inception in 1996 because it has been a very positive force for unifying our people's desire to give back to our community in a meaningful way. With a small core of repeat rowers, and new participants each year, the rowing discipline and focus has consistently allowed us to develop the necessary team spirit to perform enthusiastically both on the water and in fundraising for cancer.”

- ***Tom Love, TD Commercial Bank (regatta participant)***

Four Months Prior:

- By now, you should have a confirmed list of participants. Build the practice schedule for your crews.
- Develop a contact list for crews and coaches, which includes both email and phone numbers.
- Send a first notice to crews re: Kick-Off party.

- T-shirts: Collect logos from new crews and new sponsors, and arrange a first meeting with your T-shirt designer. Finalize the number of shirts required for participants, volunteers and sponsors one month prior to the event and place order.
- Food: Will there be food provided during the day? Who will provide it? Can food sales also be used to contribute to overall fundraising? (Remember to provide food for your volunteers.)
- Water: Arrange for extra water, either water coolers or bottled.
- Garbage Handling: With all the food and water, there's a definite need for lots of garbage containers.
- Portapotties: Everyone is grateful when they don't have to line up for bathroom breaks. Arrange for toilet facilities, if required.
- Tent: Are tents required (in case of rain, or shelter from the sun)? If so, arrange delivery date and time, as well as pick up date and time. Confirm one month prior to the event.
- Sound System: Some sort of PA system is essential. Arrange for rental if necessary. Confirm in early August and arrange a volunteer to pick up and return items.
- Medals and Awards: Are medals to be awarded to the top three finishers? Are awards to be given for high fundraising numbers? Decide upon these, design if necessary, and place your order one month prior to the event.
- Safety Boats: Decide on number required. Arrange for volunteers to drive safety boats. Confirm one month prior to the event.
- BBQ Tickets: Are tickets required for the meal? For a raffle? If so, they should be ordered at this point.
- Media: Contact your local media to find an MC for the awards banquet.

Three Months Prior:

- Confirm your crews, collect entry forms and fees, and register participants with your Provincial Rowing Association and RCA.
 - Entry forms should contain a complete list of crew member's names and addresses, team name, team contact and preferred practice time.
- Confirm your coaches and assign them to crews.
- Rules of the event should be sent out to all entrants. This may include information related to extra practices, which boats are available for training, which oars are to be used when training and who to contact if training times need to change. As well, include a notice regarding the start date of practice sessions (approximately eight weeks prior to race date) and the coxie school course dates.
- Arrange for coaching training sessions with the Head Coach for ALL coaches, to ensure consistency in coaching.
- Arrange for coach boat training sessions with the Head Coach for all coaches that require it.
- Send notice to coaches regarding coxie training course dates (usually held the last week of week prior to the start of training), coach boat training course dates and practice session start date.

- Send notice to coaches and teams for Kick-Off party (could be a partner task).
- Hold the Kick-Off party. Introduce the crews and coaches, and provide them with their contact information and practice schedules. If necessary, finish collecting their entry forms and fees.
- Prepare a package for the first practice session containing a Coaching Handbook (lesson plan), “Coxing for Dummies” handbook, waivers for the crew and “The Rules”.
- Confirm with partners if they will be sponsoring special guests (i.e. National Team rowers) to attend the regatta and BBQ, perhaps to present awards or to speak. If so, it’s nice to provide those guests with small “gifts”, and this is the time to acquire these gifts.

“...I enjoy the people in the boat, the comradeship, the exercise and all the coaches have been great every year. It is quite satisfying to see the transformation of a boat that barely stays upright (day 1) to a semi-oiled machine in just a few weeks. The event is well organized and race day is great because it mixes a little bit of competition with a whole lot of fun.”

- Kevin Swallow, Alberta Agriculture, Food and Rural Development (regatta participant)

Two Months Prior:

- Finalize practice schedule.
- All coxies must attend the Coxie Course.
- Practices start. The Rowing Club Partner (Corporate Challenge Director) should be present at the first practice session for each crew to ensure coaches and crews find each other, waivers are signed and fees have been paid.
- Have crew lists incorporated into rowing club membership list.
- If required, confirm/collect logos for all corporate teams, T-shirt sizes and number of shirts per team.
- Contact the appropriate authorities to obtain any permits to require to host event. Proof of insurance may be required; contact Rowing Canada Aviron for this.
- Continue recruiting volunteers and race officials. You’ll need lots!
- Call to confirm your various arrangement (i.e. media, BBQ tickets printed, medals, sound system, tents, portapotties, food vendors). Confirm that someone is going to pick up those items that are not being delivered.
- Send a notice to all crews (with a deadline indicated) to find out how many people are attending the BBQ and if they intend to purchase additional BBQ tickets.

One Month Prior:

- Continue to recruit volunteers and race officials (aligner, safety boat and starter) – assign to tasks. Designate a Head Official.

- Prepare “goody bags” for each crew that will contain their BBQ tickets, T-shirts, a “thank you to all participants” note and whatever other stuff you can find (water bottles, ball caps, nutritional bars etc.) that you can convince a sponsor to donate! These bags are distributed at the pre-regatta Carbo Load party.
- Send a notice to all crews, coaches and volunteers about the pre-regatta Carbo Load party – this could be a partner task.
- Prepare a schedule for regatta day.
- Assign a volunteer to prepare music for regatta day.
- Arrange to have the race course put in, if required.
- Ensure you have adequate power to meet your requirements (for sound system, food vendors etc.). If required, have a generator and extra power cords on hand.
- Arrange for adequate parking for regatta day. This may need to be done in conjunction with the city or town where the event is hosted.
- Send final notice to all crews re: parking, extra BBQ tickets, arrival time for regatta day, coaches and coxie meeting on regatta day and race schedule.
- Prepare a dynamic press release and contact local papers, radio stations etc. to promote your event.
- Arrange for any special requirements (i.e. if you are putting up large tents you may need to contact the Call Before You Dig people; if you are serving alcohol outdoors you may need temporary fencing for the area in which the alcohol will be consumed). Ensure all special requirements are looked after.
- Collect all your required supplies for regatta day: radios, megaphones, timers/stop watches, air horns, clipboards, pens, whiteboard, whiteboard markers and eraser, flags for officials, first aid kit, garbage cans/bags.
- If you are paying an honorarium to your coaches, arrange with club treasurer to have cheques prepared for distribution.
- Send a T-shirt and Thank You note to all sponsors of your event.

“...Participating in the Richard Nuxoll Memorial regatta provides our company with a win on all fronts. Internally, we have a set of criteria which determines our participation in community service fundraising events. The exceptional organization of the event and the Cross Cancer Institute fund which benefits from the regatta surpasses our expectations when determining which charitable organizations we will participate in each year. The regatta provides benefits in addition to the typical good feeling of just giving money. Our rowing team reaped the benefits of working hard together, training to be proficient enough to win the regatta. They raised funds, helped with logistical equipment, but most importantly achieved extraordinary results both personally and professionally due to their participation in the event...”

- Scott Matheson, PCL Constructors Inc. (regatta participant)

Day Zero – Regatta Day has Finally Arrived!

Close your eyes and just imagine...

The weather has cooperated. Its 25⁰ C, the sun is shining; the water is sparkling; there is no wind. All the volunteers and participants have arrived on time and the first

two eights are in the water ready to be launched for the first heat. Everybody is smiling. It's a perfect day...

- All your plans are now in motion. It will be a crazy day, with lots of last-minute glitches, but if you've done your pre-work properly it will all turn out well. Enjoy yourself! You deserve it! ☺

“...Our purpose is to demonstrate to both cancer patients and the public that the battle can be won, offer hope to those who are fighting the battle, and to raise some funds for the Institute. This has been a great experience for me, I had never been in a shell until I started this adventure 4 years ago. It offers an opportunity for me to make a return to the Cross Cancer Institute for all the fantastic care I received when a patient at the facility...”

- Doug Mohs, Molson Canada (Lifeboat participant)

A FINAL WORD ON RULES...

Rule #1: Have fun!!!

Rule #2: Put your best, most outgoing people in charge of the event!

Rule #3: Be prepared for a LOT of work ... and, subsequently, a GREAT sense of ACCOMPLISHMENT!!

Rule #4: The Head Official can be BRIBED...! ☺

Rule #5: A single person CANNOT do this alone. Recruit a committee to handle all the different tasks.

Rule #6: If it's successful for you in the first year, DON'T MAKE DRASTIC CHANGES. It'll be successful again if you LEAVE IT ALONE!!

Rule #7: Don't skimp. Invest in a catered BBQ. Invest in a gorgeous trophy and medals for the top three crews. Invest in the little things ... your participants will appreciate it.

Rule #8: Make it fun! Show everyone a good time and they're sure to come back next year.

The ERC has a position on their Executive board of "Corporate Challenge Director".

The Incumbent:

- Must be available for meetings with the Corporate Partner, Charity Partner and various corporate crew representatives commencing in February/March.
- Is responsible for recruitment and selection of approximately twenty coaches to teach a basic 6-less Learn-to-Row. This must be accomplished by mid-June.
- Is responsible for keeping records of crews registered and monies received.
- Is responsible for setting up a practice schedule for all corporate crews, taking into account the Club program equipment requirements and the preferred schedules of the coaches and the crews.
- Is responsible for ensuring that all coaches are able to perform their duties and must be able to tactfully handle any problems or complaints arising from our co-sponsors and/or corporate crews.
- Is responsible for ensuring a T-shirt design and collection of preferred sizes for all corporate members. T-shirts must also include logos of all corporate crews and sponsors. Incumbent is responsible for the distribution of T-shirts to all participants on race day.

- Is responsible for ensuring that all infrastructure items for regatta are in place, including: Alberta First Call, City of Edmonton permits, procurement of extra tents, sound system, water coolers and water, portapotties, registered race officials, first aid personnel, jet boat, safety boats, boat repair person, flags, timers, loudhailers, walkie-talkies, course markings, announcer, MC, dock master, race schedule, etc.
- Must be present throughout the months of July and August, up to and including Regatta Day. Incumbent should be available through July and August to assist coaches crews, and handle any problems or issues that may arise, such as making up of lessons missed due to weather, extra lessons requested, crew dropouts, coxswain problems, crew learning process etc.
- Must demonstrate exceedingly good interpersonal skills in dealing with a variety of diverse individuals, and must be able to act with grace and dignity under pressure. This person is the FACE of the Edmonton Rowing Club.

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