



Introducing the Canadian Rugby Foundation

Canadian Rugby Foundation
Revised May 15, 2023



CANADIAN RUGBY
FOUNDATION

Canadian Rugby Foundation

Who We Are

What We Do

Our Value Proposition

Our Funds

Q&A

“Investing in the Future of Canadian Rugby” for 20 Years

- Canadian Not-for-Profit Corporation and public foundation charity offering tax receipts to donors
- Arms-length, cooperative relationship with Rugby Canada, formalized in 2022 MOA
- Assets of \$19.3 million (March 31, 2023)
- 2022 Donations of \$1.2 million, disbursements of \$529,000
- Cumulative donations since 2003: \$21.588 million
- Cumulative disbursements since 2003: \$3.390 million

Role of the Canadian Rugby Foundation

- Building endowment funds with income used to develop and grow community and high-performance rugby in Canada
- Initiating and/or assisting specific projects and organizations at clubs, schools, universities, regions and with award programs
- Supporting the growth of national talent pool of players, coaches and officials including Canada’s national teams and pathways
- Overseen by an independent volunteer Board of Directors drawn from the rugby community, including one Rugby Canada representative: Phil Otto
- More: <https://canadianrugbyfoundation.ca/>

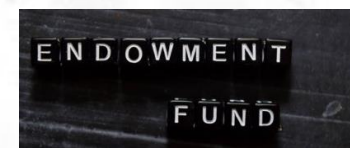


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Establish and manage endowed funds for and sponsored by local rugby clubs, teams, groups and individuals

- Help create new funds
- Oversee investment management of the funds
- Generate returns on the funds
- Track and report on funds performance
- Disburse funds ensuring they are used for rugby-specific operations, awards, and capital projects.
- Support important Canadian rugby initiatives from Unrestricted Fund, e.g.,
 - Canadian Rugby Club M/W Championships
 - Thunder Indigenous Rugby Fund
 - BC Grassroots Rugby Foundation
 - 2021-22 Canada Grassroots Assistance Fund

Examples of endowed funds, ranging from \$20K - \$3M:

- Brantford Harlequins RFC
- Rugby Canada Men's U20 Fund
- Judy Seddon Memorial Award Fund
- Monty Heald National Senior Women's Fund
- Rugby Ontario Fund
- Toronto Scottish FFL Fund

68 Funds With Expanding National Footprint

68 Funds:

BC: 31
AB: 8
MB: 1
NB: 2
NL: 1
ON: 22
QC: 3



13 additional funds in development (5/19/23):

ON: 5
BC: 3
QC: 2
SK: 2
MB: 1

BC Bayside RFC Clubhouse Campaign
BC BC Grassroots Rugby Fund
BC Capilano Rugby Club
BC Captain's Fund
BC Castaway Wanderers RFC Fund
BC Courtenay Taaffe Award
BC C.O.R.E. Fund
BC Crimson Tide Junior Fund
BC Dennis Crawford Memorial Award
BC Dick Ellis Fund
BC Gerald McGavin Coaching Award
BC Jack Patrick, Nick Mathers, Tillman Briggs Family Awards Fund
BC Tillman Briggs Capital Fund
BC John Cannon Award
BC LeadHerShip Fund
BC Col. W.D.C. Holmes University Fund
BC Marina and Howard Gerwing Award

BC Meraloma RFC Fund
BC Monty Heald Sr. Women's Fund
BC Olympic Hong Kong 7s Fund
BC Pacific Pride Legacy Fund
BC Quinn Lauridsen Memorial Award Fund
BC Ravens Ripper Fund
BC Steven Batie Memorial Award Fund
BC Thomas Family Award
BC Thunder Indigenous Rugby Fund
BC U20 Fund
BC University Rugby Supporters Fund
BC Unrestricted Fund
BC VIRU - Creighton Fund
BC Westshore RFC
AB Ancient Nor'Westers Endowment Fund
AB Clansmen Legacy Fund
AB David Robinson Memorial Award
AB Don Whidden Memorial Award Fund

AB Green and Gold Legacy Fund
AB Judy Seddon Memorial Award
AB Leprechaun Tiger RFC Legacy Fund
AB Strathcona Druids RFC Fund
MB Friends of Manitoba Rugby Fund
ON Accelerated Rugby Fund
ON Aurora Barbarians Fund
ON Brampton RFC
ON Brantford Harlequins RFC
ON Burlington Centaurs RFC Fund
ON Colette McAuley NSWT Award
ON David Burnett Memorial Award
ON Fletcher's Patrons Fund
ON George Jones Award
ON Guelph Gryphons Women's Rugby Award Fund
ON Hamilton Hornets Rugby Fund
ON Les Voyageurs Fund

ON Liam Geddes Memorial Award
ON Markham Irish MICRC Legacy Fund
ON Niagara Old Boys RFC Fund
ON Rugby Ontario FFL Fund
ON Rugby Rumble Fund
ON Toronto Nomads Rugby Endowment Fund
ON Toronto Saracens Legacy Fund
ON Toronto Scottish FFL Fund
ON Toronto Scottish RFC Fund
ON Western Mustangs Men's Rugby Fund
QC John Jones Memorial Award
QC Montreal Irish Fund
QC Montreal Irish RFC Capital Fund
NB Saint John Trojans RFC
NB Loyalist Legends Legacy Fund
NL Deacy, Browne, Parfrey Fund

68 Endowment, Awards, Capital, and Rugby Canada-related Funds

CLUB ENDOWMENT FUNDS (33)

1. Ancient Nor'Westers Endowment Fund
2. Aurora Barbarians Fund
3. BC Grassroots Rugby Fund
4. Brampton RFC Fund
5. Brantford Harlequins RFC Fund
6. Capilano Rugby Club
7. Castaway Wanderers RFC Fund
8. Clansmen Legacy Fund
9. Central Okanagan Rugby Enthusiasts (CORE)
10. Crimson Tide Junior Fund
11. Deacy, Browne, Parfrey Fund
12. Fletcher's Patrons Fund
13. Friends of Manitoba Rugby Fund
14. Green and Gold Legacy Fund
15. Hamilton Hornets Rugby Fund
16. LeadHerShip Fund
17. Leprechaun Tiger RFC Legacy Fund
18. Les Voyageurs Fund
19. Loyalists Legends Legacy Fund
20. Markham Irish MICRC Legacy Fund
21. Meraloma Rugby Endowment Fund
22. Montreal Irish Fund
23. Ravens Ripper Fund
24. Rugby Ontario FFL Fund
25. Rugby Rumble Fund
26. Thunder Indigenous Rugby Fund
27. Toronto Nomads Rugby Endowment Fund
28. Toronto Saracens Legacy Fund
29. Toronto Scottish FFL Fund
30. Toronto Scottish RFC Fund
31. University Rugby Supporters Fund
32. Western Mustangs Men's Rugby Fund
33. Westshore RFC Fund

AWARDS FUNDS (18)

1. Brampton RFC Fund
2. Capilano Rugby Club Fund
3. Colette McAuley NSW Award Fund
4. Courtenay Taaffe Award Fund
5. David Burnett Memorial Award Fund
6. David Robinson Memorial Award Fund
7. Dennis Crawford Memorial Award Fund
8. Don Whidden Memorial Award Fund
9. Gerald McGavin Coaching Award
10. Guelph Gryphons Women's Rugby Award Fund
11. Jack Patrick & Nick Mathers & Tillman Briggs Family Awards Fund
12. John Cannon Memorial Award Fund
13. John Jones Memorial Award
14. Judy Seddon Memorial Award
15. Liam Geddes Memorial Award Fund
16. Marina and Howard Gerwing Award
17. Steven Batie Memorial Award Fund
18. Thomas Family Award Fund

CAPITAL FUNDS (9)

1. Aurora Barbarian RFC Development Fund
2. Bayside RFC Clubhouse Campaign Fund
3. Burlington Centaurs Fund
4. Montreal Irish Capital Fund
5. Niagara Old Boys RFC Capital Fund
6. Saint John Trojans RFC Fund
7. Strathcona Druids RFC Fund
8. Tillman Briggs Capital Fund
9. VIRU- Creighton Capital Fund

RUGBY CANADA-RELATED FUNDS (7)



1. Accelerate Rugby Fund
2. Captains' Fund
3. Dick Ellis Memorial Fund
4. Monty Heald National Senior Women's Fund
5. Hong Kong and Olympic 7s Fund
6. Pacific Pride Legacy Fund
7. U20 Fund

CRF UNRESTRICTED FUND (1)



CANADIAN RUGBY
FOUNDATION

RESTRICTED ENDOWMENT

ENDOWMENT

- Donations are irrevocable gifts to the Foundation
- Donor-advised or Restricted Funds – **disbursements requested at the discretion of the Fund Sponsors (not the Foundation)** subject to CRA requirements and Memorandum of Agreement terms, and only to a qualified donee (e.g., Rugby Canada).
- Capital is invested in perpetuity. Only interest is disbursed.
- Disbursements of 3.5-5.0% of assets annually based on Fund size.
- Matching contributions of 25% with maximum match \$20,000.
- Interest on the funds pegged at 3.5%
- Asset growth dependent on new donations, interest, fund-raising, minus disbursements.

CAPITAL



- Donations made with the expectation that the **Fund assets will be completely withdrawn** for use on capital project(s) such as a new clubhouse, facility renovations, or major equipment purchase.
- Donations are tax receipt eligible.
- Donor-advised or restricted Funds – disbursements requested at the discretion of the Fund Sponsors subject to CRA requirements and Memorandum of Agreement terms which describe the intended capital project.
- No matching contribution as capital will be withdrawn.
- Interest on the funds pegged at 3.5% (not a guaranteed amount but the Foundation has never failed to deliver).

UNRESTRICTED



- **Unrestricted fund with disbursements at the discretion of the Foundation**
- Revenues based on direct donations, net investment returns of the total Foundation, Administration & General (A&G) fees from the five \$1 million+ Funds.
- Expenses based on administration expenses (less than 1% of assets), matching contributions to Funds, the 3.5% returns to its Funds under \$1 million, investment management fees, and grants to and sponsorships of specific initiatives



CANADIAN RUGBY
FOUNDATION

Benefits to CRF

- Establish new endowment funds
- Increase assets
- Increase capacity to grow and develop rugby

Benefits to Fund Sponsor

- Tax receipts for Fund donors
- 25% Matching on funds (maximum of \$20K)
- Endowed funds – capital invested in perpetuity
- 3.5-5.0% payouts annually (tax-free)
- Shared returns from investments
- No Administration fee
- Regular fund performance reporting
- Leading institutional fund manager with low fees (<0.45%)
- Conservative (stable, secure) investment policy
- Reduced time spent on financial asset management
- Reduced reliance on annual fund-raising for operating expenses

What is the investment management fee?

The Foundation currently pays investment management fees of **<0.45 percent** per annum before a 10 percent of fees annual donation from Leith Wheeler. This includes Leith Wheeler's external custodian, legal and audit fees. (Based on total assets \$19 million+)

INSTITUTIONAL FEE SCHEDULES

Balanced Mandates

Balanced Management Fee Schedule ^{1,2,*}	
First \$1 million	0.80%
Next \$9 million	0.45%
Next \$20 million	0.35%
Next \$45 million	0.30%
Next \$45 million	0.25%
Balance (above \$120 million)	0.20%

**Does not include International Equities*

1. Based on a minimum portfolio size of \$10mm.
2. Portfolios under \$10mm require approval and a minimum annual management fee may be applied.



International Pooled Management Fee Schedule*

First \$2 million	0.915%
Balance (above \$2 million)	0.515%

**Investments in the International Fund are restricted to clients who have at least one other asset class managed by Leith Wheeler. In addition, Investments in foreign asset classes may not exceed 50% of the total portfolio value.*

CanadaHelps.org is our online platform used for fund donations. CanadaHelps charges a processing fee as shown below which varies by type of donation. This is intended to cover associated transaction processing fees from banks, credit card companies and/or supporting brokerage firms, and the costs of operating the CanadaHelps platform. The donor receives a tax deduction for 100 percent of their donation and the fund receives the total less the fee. For that reason, we recommend making direct contributions to CRF by cheque or other means to avoid these transaction fees for large donations.

	Fees
One Time Donations	4.0%
Monthly Donations	3.5%
Cause Funds Donations	3.75%
Securities Donations*	2.0 – 3.0%*



** 3% fee applies to donations less than \$10,000; 2.5% fee applies to donations between \$10,000-\$49,999; 2.25% fee applies to donations between \$50,000-\$99,999; 2% fee applies to donations \$100,000+*

Determine Fund Purpose

1-2 Days

Potential Fund Sponsor (FS) develops preliminary idea for a new Fund and its goals.

FS contacts CRF Executive Director (ED)

FS and ED schedule and hold telephone or Zoom call to discuss scope, scale, and type of fund:

Draft MOA

1-2 Weeks

ED emails Draft 1 Memorandum of Agreement (MOA)

FS discusses with other Fund sponsors, club executives, and major donors; develops Draft 2 with Schedule A with unique terms of the Fund and 2 Fund Representatives identified.

FS and ED discuss and develop penultimate draft MOA.

Final MOA draft signed and sealed

Set Up NewFund

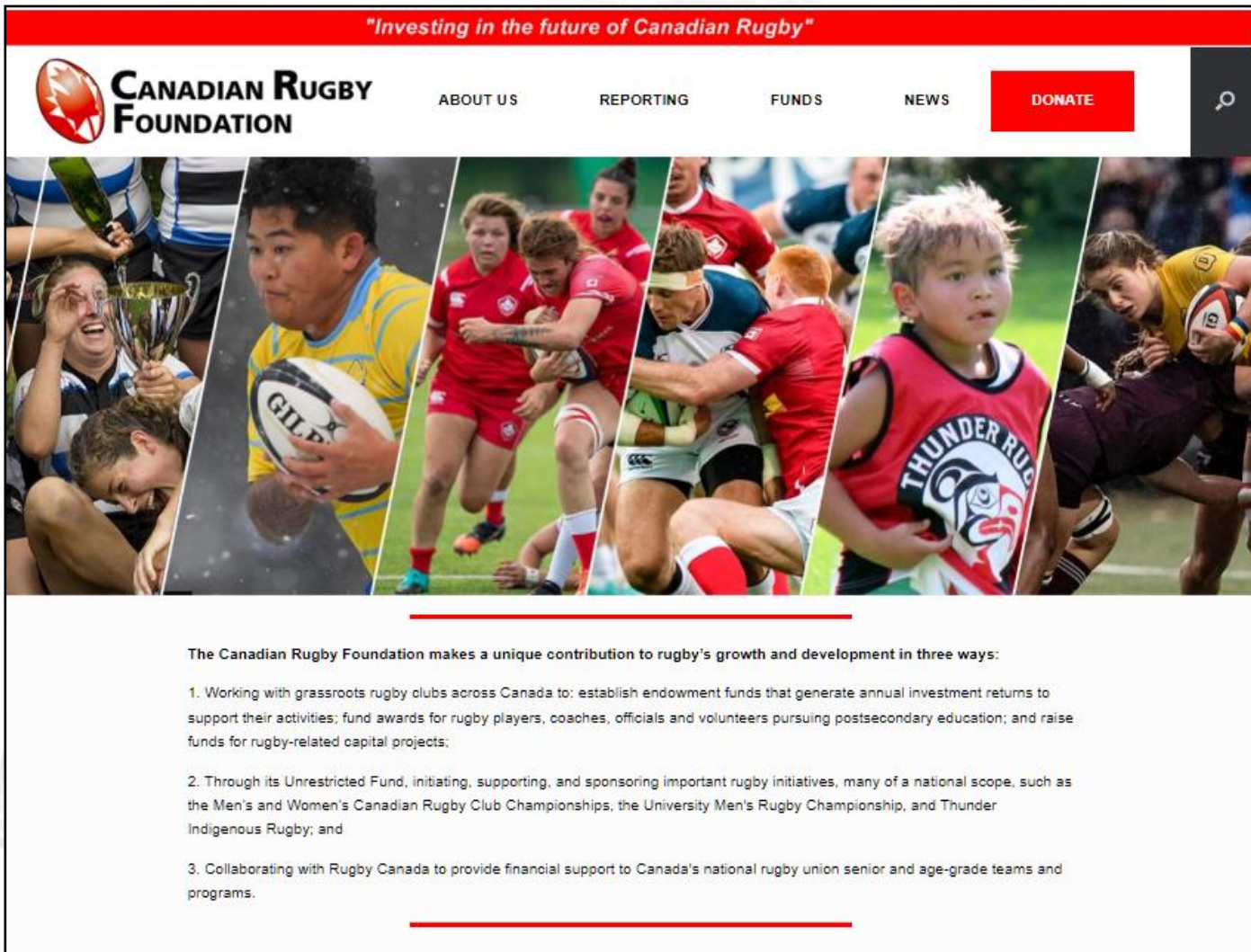
2-4 Days

New Fund set up on CRF books with Financial Administrator and Treasurer.

New Fund set up with Leith Wheeler, the CRF Investment Manager.

New Fund set up on CRF website and CanadaHelps.org to accommodate new donations

Website: <https://canadianrugbyfoundation.ca/>




The screenshot shows the homepage of the Canadian Rugby Foundation. At the top, a red banner contains the tagline "Investing in the future of Canadian Rugby". Below this is the navigation menu with the Canadian Rugby Foundation logo on the left and links for "ABOUT US", "REPORTING", "FUNDS", "NEWS", and a red "DONATE" button. A search icon is also present. The main content area features a collage of five images: a group celebrating with a trophy, a player holding a Gilbert rugby ball, a scrum in progress, a young child in a red "THUNDER RUGBY" jersey, and a player in a yellow jersey. Below the images, a red horizontal line is followed by the text: "The Canadian Rugby Foundation makes a unique contribution to rugby's growth and development in three ways:" and a numbered list of three points.

"Investing in the future of Canadian Rugby"

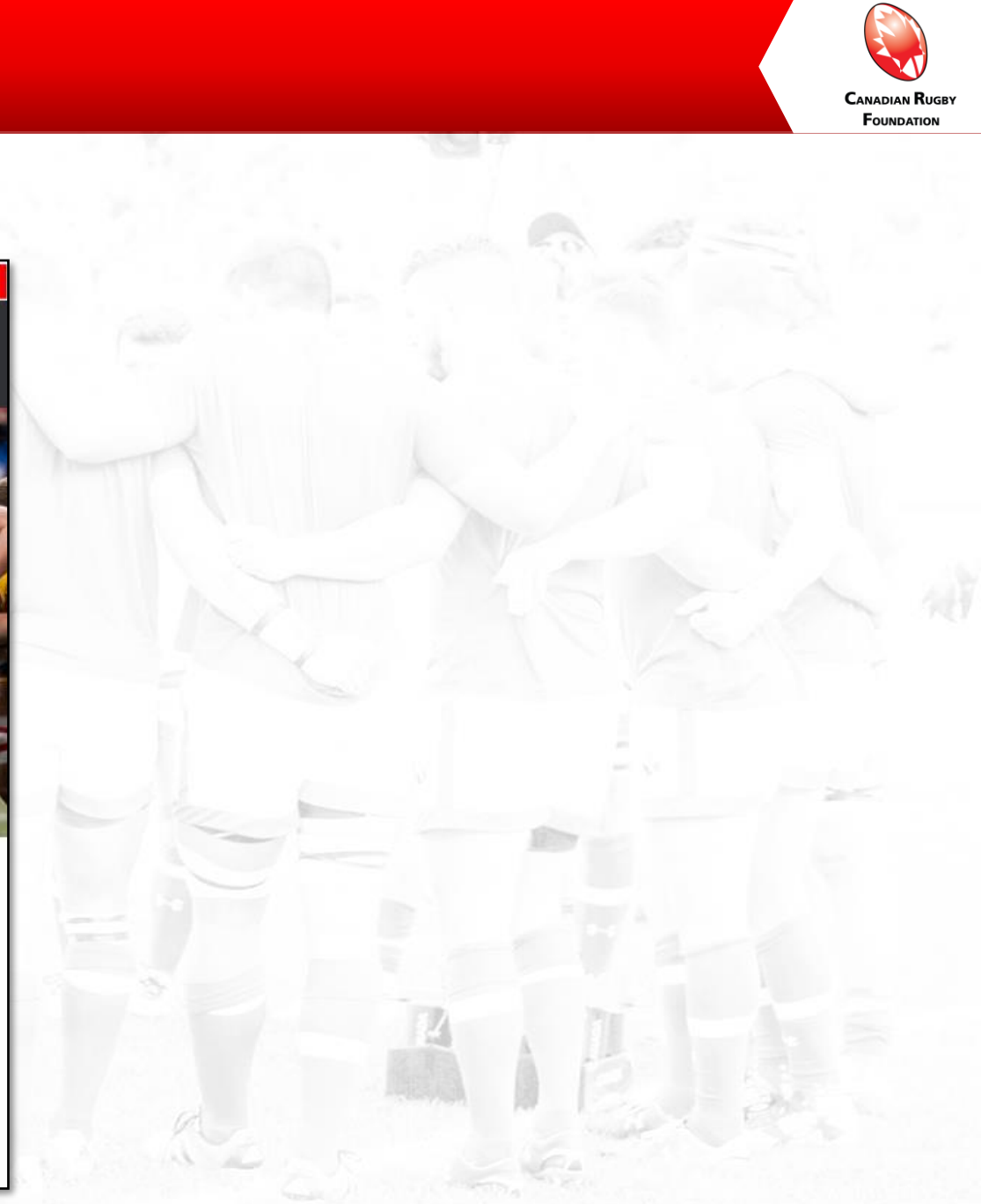
CANADIAN RUGBY FOUNDATION

ABOUT US REPORTING FUNDS NEWS **DONATE** 🔍



The Canadian Rugby Foundation makes a unique contribution to rugby's growth and development in three ways:

1. Working with grassroots rugby clubs across Canada to: establish endowment funds that generate annual investment returns to support their activities; fund awards for rugby players, coaches, officials and volunteers pursuing postsecondary education; and raise funds for rugby-related capital projects;
2. Through its Unrestricted Fund, initiating, supporting, and sponsoring important rugby initiatives, many of a national scope, such as the Men's and Women's Canadian Rugby Club Championships, the University Men's Rugby Championship, and Thunder Indigenous Rugby; and
3. Collaborating with Rugby Canada to provide financial support to Canada's national rugby union senior and age-grade teams and programs.





SUPPORT A FUND

The health of the grassroots rugby system in Canada, and their endowment funds depends on your support. Please give generously – whether as a one-time donation or monthly donation subscription.

[SUPPORT](#)



START A FUND

We can help establish a new fund quickly and easily. Just reach out and we can talk you through the pros and cons and necessary steps once you have the preliminary Fund objectives in mind.

[START](#)



GROW A FUND

We can help you grow your Fund – whether it is a new or existing large fund – using a constantly expanding toolkit “Building Your Fund for Sustained Growth” and other resource materials.

[GROW](#)



Announcing the new Aurora Barbarians RFC Development Fund



8 University Men's Rugby Coaches Now Selected for Advanced Coaching Courses in New Zealand and Wales



Announcing the Meraloma Rugby Endowment Fund



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