



CANADIAN RUGBY  
FOUNDATION

# Introducing... The Canadian Rugby Foundation

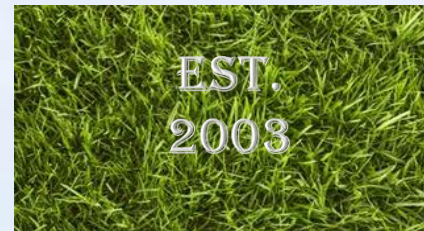
- **Introducing the Canadian Rugby Foundation**
- **CRF Value Proposition**
- **Foundation's 68 Funds\***
- **Fund Types**
- **Starting a New Fund**

**\* As of June 1, 2023**

# Introducing the Canadian Rugby Foundation (CRF)

## “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



## Metrics

- **Assets of \$19.3M** at Mar 31, 2023. \$5.9M at Dec 31, 2021
- **2022 Donations of \$1.2M, disbursements of \$529K**
- Cumulative donations since 2003: **\$21.588 million**
- Cumulative disbursements since 2003: **\$3.390 million**



## Role

- Encouraging and building endowment and capital funds with income or capital used to develop and grow community and high-performance rugby in Canada
- Initiating and/or supporting specific projects and organizations at clubs, schools, universities, regions and with award programs







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## Benefits to CRF

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

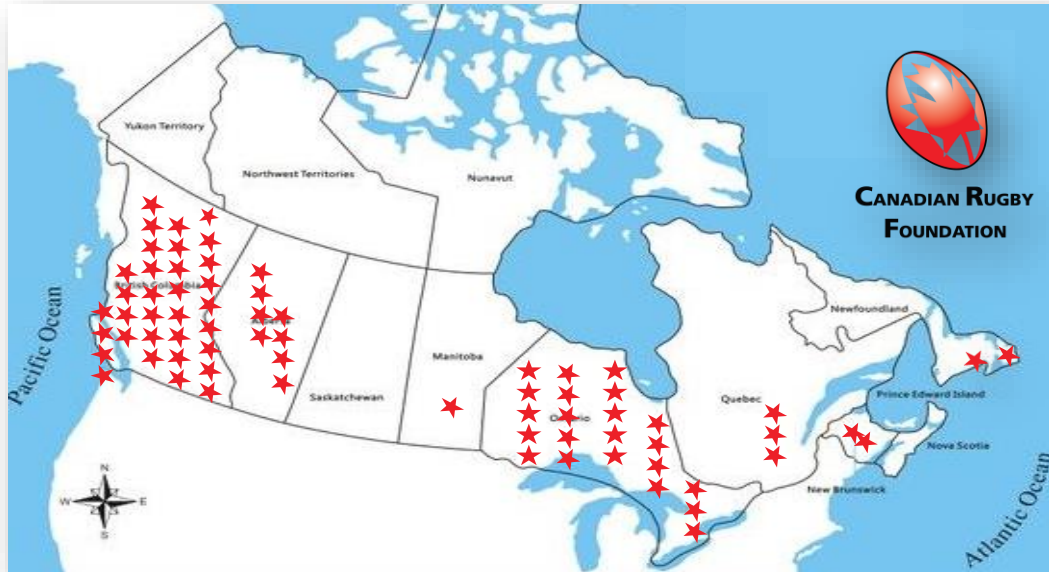
## Benefits to Fund Sponsor

- 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) from interest
- Shared returns from investments
- No Administration fees
- 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

# 68 Funds With Increasing National Footprint

**68 Funds  
(6/1/23):**

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



**13 additional funds in  
development  
(6/1/23):**

**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



# 3 Fund Types

## RESTRICTED ENDOWMENT

# ENDOWMENT

- **Restricted (disbursements requested at the discretion of the Fund Sponsors, not the Foundation) towards rugby operating expenses or awards** subject to CRA requirements and Memorandum of Agreement terms, and only to a qualified donee (e.g., Rugby Canada).
- Donations are irrevocable gifts to the Foundation and are **tax receipt eligible**.
- **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%** to maximum \$20,000.
- **3.5% Interest on the funds.**

## CAPITAL



- **Fund assets are completely withdrawn for use on capital project(s)** such as a new clubhouse, facility renovations, or major equipment purchase at the discretion of the Fund Sponsors subject to CRA requirements and MOA terms which describe the intended capital project.
- Donations are irrevocable gifts to the Foundation and are **tax receipt eligible**.
- **No annual disbursements – capital is withdrawn according to project milestones.**
- **No matching contribution** as capital will be withdrawn.
- **3.5% Interest on the funds.**

## 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

# 68\* Endowment, Awards, Capital, and Rugby Canada-related Funds

## CLUB ENDOWMENT FUNDS (32)

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. Loyalists Legends Legacy Fund
19. Markham Irish MICRC Legacy Fund
20. Meraloma Rugby Endowment Fund
21. Montreal Irish Fund
22. Ravens Ripper Fund
23. Rugby Ontario FFL Fund
24. Rugby Rumble Fund
25. Thunder Indigenous Rugby Fund
26. Toronto Nomads Rugby Endowment Fund
27. Toronto Saracens Legacy Fund
28. Toronto Scottish FFL Fund
29. Toronto Scottish RFC Fund
30. University Rugby Supporters Fund
31. Western Mustangs Men's Rugby Fund
32. Westshore RFC Fund

## AWARDS FUNDS (18)

1. Brampton RFC Fund
2. Capilano Rugby Club Fund
3. Colette McAuley NSWTF 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 (8)



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

## CRF UNRESTRICTED FUND (1)



\* As of June 1, 2023



# Starting a New Fund

## 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 New Fund

**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



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