



2011 BMO CHAMPION PLANNING GUIDE

OCTOBER 2011

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The Kids of Canada Thank You

You have committed to help kids in your community and across the country by taking on the role of BMO Champion. We are committed to ensuring you have a successful and rewarding experience.

This is a step by step guide to organizing a BMO Boolathon in support of Kids Help Phone. In addition, this is a resource guide to support your efforts. But you are not alone, BMO employees as well as Kids Help Phone staff and volunteers are here every step of the way. Please feel free to reach out for assistance to the contacts on page 11.

About BMO Financial Group and Kids Help Phone

As a Founding Sponsor, BMO® Financial Group has been supporting Kids Help Phone since its inception in 1989. BMO is proud to be the title sponsor of the BMO® Boolathon in support of Kids Help Phone, a fun and highly successful fundraising event created by a group of BMO employees in 1991. In 2010, the event was hosted in close to 50 sites across the country, raising \$1 million to help fund essential phone and online counselling services for children throughout Canada. BMO also supports a number of local Kids Help Phone events, and is the presenting sponsor of the Kids Help Phone Student Ambassador programs.

About Kids Help Phone

Kids Help Phone is an **essential** service available to the **6.5 million young people aged 5-20 in Canada** (*Stats Canada 2010*) by providing free, anonymous, confidential, professional counselling services 24 hours a day, 365 days a year in both official languages. Kids Help Phone's counsellors have been providing help and hope to young people in your community since 1989. No matter what the problem, Kids Help Phone is there.

How Kids Help Phone helps

- All it takes to reach Kids Help Phone is a telephone or a computer.
- Any time of the day or night, from anywhere in Canada, kids, teens and young adults can connect with a professional counsellor.
- No matter the question, no matter the problem, professional counsellors offer anonymous, free and confidential service.
- In 2010, the professional counsellors at Kids Help Phone assisted kids more than 4,300 times every single week, from communities all across Canada.

BMO Boolathon in support of Kids Help Phone FAQ

What is the Boolathon?

The BMO Boolathon in support of Kids Help Phone is an annual Halloween-themed bowling fundraising event to support Kids Help Phone's youth counselling services.

Why participate?

Feelings of frustration, sadness and uncertainty are an inevitable part of growing up. Healthy coping includes asking for help. Kids talk to Kids Help Phone when they don't know who to talk to.

How is money raised?

Boolers collect pledges from friends, co-workers and family. Many teams also organize fundraising activities before the event to build awareness, and allow those who may not be able to participate on event day make a contribution.

How do participants register?

You can register a team online at boolathon.ca or contact us at info@boolathon.ca. Teams must register before the event to reserve their lane. Each team (of five or six) is encouraged to raise a combined minimum of \$500.

When is the Boolathon?

It's taking place on Saturday, October 29th or Sunday, October 30th (October 22nd or 23rd in BC). The event is one and a half to two hours long.

Where can I participate?

There are more than 50 Boolathons taking place across Canada. Go to boolathon.ca, click on "Boolathon Event Details" to find a location near you.

What should I wear?

All participants are encouraged to come in their most creative costumes!

Host your own bowling event with our Boo-in-a-box!

The concept is simple – if you are unable to attend the event, or your community is not listed, you can host your own workplace or community event in support of Kids Help Phone. When you request a Boo-in-a-box package, you will receive a simple event guide, fundraising ideas and information about online registration. Please contact us at info@boolathon.ca or call us at 1-800-268-3062.

Confirmed sites (as of August 30th):

British Columbia: Abbotsford, Nanaimo, North Shore, Surrey, Vancouver, Victoria

Alberta: Calgary, Edmonton, Fort McMurray, Grande Prairie, Lethbridge, Red Deer

Saskatchewan: Moose Jaw, Regina, Saskatoon

Manitoba: Winnipeg

Ontario: Barrie, Brantford, Chatham, Cornwall, Hamilton, Kingston, Kitchener-Waterloo, London, Niagara, Ottawa, Peterborough, Quinte, Sarnia, Sault Ste. Marie, Stratford, Sudbury, Thunder Bay, Windsor

Ontario (GTA): Brampton, Durham (Oshawa), Etobicoke, Mississauga, North York, Toronto (Yorkdale), Toronto (Downtown), York Region

Quebec: Montreal, Quebec City

New Brunswick: Moncton, Saint John

Newfoundland: Bay Roberts, Clarenville, Corner Brook, Gander, Grand Falls-Windsor, Marystown, St. John's, Stephenville

Nova Scotia: Halifax

Volunteer Committee Responsibilities

You are not alone! All volunteers will work closely with Kids Help Phone representatives to make sure the BMO Boolathon is a success.

BMO Champions

- Recruit committee/sub-committee leaders
- Work with Kids Help Phone representatives to establish timelines, budget, participation targets and financial goals for the event
- Provide overall leadership to individual sub-committee leaders
- Recruit teams and individual participants to raise pledges and bowl
- Work with Lead Team Captains (if applicable) to relay information to BMO employees in branches
- Ensure that event logistics run smoothly
- Recruit and train volunteers to implement registration at the event if necessary at your site
- Oversee and coordinate event activities on an internal basis
- Monitor overall progress and solve problems as needed
- Facilitate organizing committee meetings
- Work with Kids Help Phone regional representatives to establish and maintain effective procedures for financial management, registration (online and offline), record keeping and safety

BMO Recruitment Leader or Chair

- Work with Kids Help Phone regional representatives, committee members and Lead Team Captains (if applicable) to develop a BMO fundraising plan
- Make presentations and follow-up calls to potential BMO team captains who have expressed interest in participating in the event
- Communicate with team captains both before and during the event to help their team reach their fundraising goals
- Use online registration reports in September and October to help monitor progress

BMO Lead Team Captain(s)

- Serve as a liaison between the BMO Champions and branch employees (if your branch has more than one team participating)
- Encourage employees to form teams, register, and raise pledges for the BMO Boolathon
- Spearhead any local branch fundraising initiatives

Other Volunteer Committee Opportunities

Kids Help Phone representatives will assist with the following tasks but are not limited to these roles, and will provide as much support as possible.

Event Logistics

- Determine logistical needs for the site – lane assignments, venue set-up, etc.
- Arrange for all necessary supplies and equipment (donated whenever possible)
- Organize all logistics on the day of the event
- Organize fun games and/or contests

Volunteers/Registration Leader

- Implement a volunteer plan for the day of the event, including volunteer needs
- Assist with volunteer recruitment
- Train and motivate day-of volunteers
- Manage registration and fundraising rewards pick-up process (job descriptions and training provided by Kids Help Phone)

Public Relations and Promotions

- Kids Help Phone and BMO Financial Group will work closely to ensure any media opportunities are explored within your community.

If you know of a fellow BMO Financial Group employee that is interested in one of these responsibilities, please ask them to contact your local Kids Help Phone representative.

Internal Communication Planning

The key to a successful event is awareness! Your Divisional Communication Manger plays a key role in communicating this event to BMO employees and also understands the best tactics for garnering employee engagement.

To provide consistent and accurate messaging, and to avoid overloading colleagues with communications, develop a communications plan which consolidates your messages and allows communications to be issued by one person or group at pre-determined intervals. We recommend you work closely with your divisional BMO Communication Manager, included in the contact list provided with this planning guide. They will assist with getting the message out to all BMO Financial Group employees to encourage awareness and support for the event.

BMO Communication Plan

Date	Message	Sender
Early September	Campaign Launch – Posting on BMO Harris Central	BMO National
October (ongoing)	Divisional Portals and Emails	BMO Regional Communication Managers
October 31 st	Thank you – Posting on BMO Harris Central	BMO National

Sample Planning Timeline/Task List

This is a sample of what tasks your committee can expect to do during the campaign. Please keep in mind that tasks will vary depending from site to site and Kids Help Phone representatives are there to help every step of the way!

WHEN	WHO	WHAT
August	KHP/Committee	<i>Confirm committee members and lead team captains (if applicable)</i>
	KHP	Contact bowling alley to confirm date/time and get a quote.
	Committee	Set committee meeting schedule
	KHP/Committee	Set goals for fundraising, number of participants/teams
	KHP/Committee	Create a list of potential boolers – look at past participants and new prospects
	KHP/Committee	Begin sourcing prizes for best costumes, etc., or to use as raffle or 50/50 draw items
	KHP/Committee	FUNDRAISING FOCUS – ongoing fundraising and recruitment with lead team captains (if applicable), companies/groups and individuals
	KHP	Website live and pledge forms and posters available
	KHP	Monitor registration and team participation online and offline
	KHP	Secure supplies and materials for event day
September	KHP	Come up with great ideas/activities to make your event fun for all participants!
	KHP/Committee	Begin recruiting volunteers for event day
	KHP/Committee	Ongoing recruitment and fundraising -- talk/present to new teams and keep others excited!
	KHP	Implement local PR plan
	KHP	Confirm day-of volunteers (set up advanced orientation if necessary)
	KHP/Committee	Secure local media support (if applicable)
October	KHP/Committee	Confirm Emcee (could be local radio personality, branch manager, BMO Champion, etc.)
	KHP/Committee	Host a kick off or introduction to Kids Help Phone for your fellow employees
	KHP/Committee	Continue to encourage fundraising and recruit additional teams
	KHP	Confirm day of details
	KHP	Secure prizes for event day (if applicable)
November	KHP	Train volunteers on registration and pledge collection process
	Everyone!	BMO Boolathon in support of Kids Help Phone
November	KHP/Committee	Complete final evaluation report
	KHP	Recognize top teams, boolers and supporters

Hosting an Internal Kick-Off

Hosting a BMO Boolathon kick-off is a great first step in launching your campaign! The kick-off can be used to tell your colleagues more about Kids Help Phone, generate excitement about the BMO Boolathon, and provide information and details related to the event. Work with your Kids Help Phone representative member to help make it a success!

Step 1: Choose a Date and Location or connect it to an existing event/meeting

- Host your kick-off approximately one month before the BMO Boolathon in support of Kids Help Phone.
- Connect with Kids Help Phone and have a staff member help plan and attend your kick-off to talk about the service and how participating in the BMO Boolathon makes it possible for Kids Help Phone to be there for kids in your community and across Canada.
- Make it convenient – host the event in your boardroom or cafeteria and be sure to pick a time when most people will be free. Lunch-and-learns or morning coffee breaks are usually a hit and food often motivates people to attend! Consider getting food or drinks donated.
- As there are area branches in multiple locations, consider having multiple, smaller kick-off events to generate local excitement.
- Make sure that important attendees (like your senior leadership team) are available before sending out invitations.
- Connect with your Divisional Communication Manager within BMO Financial Group to assist with ideas for your event.

Step 2: Invite Your Colleagues

- Send an eye-catching email invitation and follow up with a personal phone call.
- Put posters up in your office and lunch room.

Step 3: Organize Interesting and Motivational Speakers

- Consider asking a senior leadership representative to show their support for the BMO Boolathon and offer some motivational messages.
- Consider asking a participant from a past BMO Boolathon to speak and share their success stories and ideas.
- Consider inviting a representative from Kids Help Phone (where possible)

Step 4: Use Kids Help Phone Tools

- Contact your local Kids Help Phone representative to find out what tools and information items are available to you
- Play Kids Help Phone's informational video and/or television PSA's.
- Promote the BMO Boolathon website at boolathon.ca.
- Promote the new Kids Help Phone website to show participants how their money is helping

Step 5: Make it Informative and Fun

- Promote the BMO Boolathon as a fun way to support kids in your community.
- Play a game – host a round of trivia and award a prize to the winner.
- Set up demonstration booths that show unique fundraising ideas – people can mingle and learn great ways to fundraise at the same time!

Fundraising Ideas

Raising money as an individual can be challenging, so why not round up your teammates and do it together? Here are some fun and easy ideas to get you started!

50/50 Draw

- Half the proceeds go to the winner and half go to your team! Please check your provincial laws to see whether you need a license to run a 50/50 draw.

Bake Sale

- A fun, easy and delicious way to raise funds for your team.

Team Challenge

- Challenge another team to anything! A little competition goes a long way toward raising funds!

Brown Bag Lunch Day

- Encourage your team members to bring their lunch to work one day a week during the month leading up to the event and donate what they would have spent on lunch to your team's goal.

Coffee Break

- Host a coffee break with homemade goodies at your branch and donate all proceeds to your team.

Office Pool/Fantasy League

- You pick the rules and the topic – sports are popular but other ideas can work too, so be creative! Half of the proceeds go to the winner and half to your team!

Games Night

- Invite family, friends, and co-workers over for a night of socializing and board games and charge a nominal admission fee.

Trivia Challenge

- Research topics like sports, entertainment, Canadian history and company history and host a trivia night for colleagues and friends.
- Charge a fee to participate – winner receives a prize and all funds raised go to your team.

Potluck Lunch

- Your team provides the food – everyone else pays to enjoy it.

Garage Sale

- A good way to raise funds and clear out the clutter in your house. Involve your whole team and have one gigantic sale!

Note to BMO Employees: All fundraising ideas are non-customer facing and should involve colleagues, family and friends only. Funds raised from team fundraising events are not eligible for a tax receipt BUT are eligible for team fundraising rewards. Visit boolathon.ca for more information.

Sample BMO Boolathon in Support of Kids Help Phone Schedule

(Based on a 2:00 p.m. start)

Don't forget that Kids Help Phone will be there to help!

TIME	TASK
12:00 p.m.	Set-up signage, registration, operations/volunteers area, incentive prizes, etc.
1:00 p.m.	Registration and incentive prize volunteer training
1:30 p.m.	Welcome table open Paid duty officer on site or onsite security Emcee begins
2:00 p.m.	Bowling begins Registration and pledge collection begins, fundraising reward pick-up begins
2:30 p.m.	Spot prizes handed out (if applicable) Best costume prizes handed out (if applicable)
3:30 p.m.	Prepare pledge forms and pledges for pick-up or drop-off
4:00 p.m.	Clean up!

Sample Volunteer Needs and Schedule

Volunteer job	Description	Recommended number of volunteers	Approximate timing (based on 2:00 p.m. start)
Volunteer/registration team leader	Train and organize all volunteers	1	12:00 – 4:00 p.m.
Greeters/welcome table	Welcome participants and provide necessary information	2-4	1:00 – 2:00 p.m.
Pledge collectors	Collect pledges from participants	2-4	1:45 – 3:00 p.m.
Pledge supervisors	Organize collected pledges	1-2	1:30 – 4:00 p.m.
Pledge counters (can be the same as pledge supervisors)	Count and organize all pledges and deposit at the bank after the event	1-2	2:00 – 4:00 p.m.
Emcee	Make announcements – speak briefly at short intervals	1	1:30 – 3:30 p.m.
Fundraising reward table	Distribute fundraising rewards	2-3	2:00 – 3:00 p.m.
Spot prizes (if applicable)	Give small prizes out to participants	2	2:30 – 3:00 p.m.

Kids Help Phone Representatives

Region	Name	Phone number	Email address
British Columbia and Yukon	Leslie Mauro	(604) 267-7057	leslie.mauro@kidshelpphone.ca
Alberta	Priscilla Ng	(403) 476-0386	priscilla.ng@kidshelpphone.ca
Saskatchewan	Cindy Kobayashi	(306) 780-9499	cindy.kobayashi@kidshelpphone.ca
Manitoba	Nathan Terin	(204) 925-9675	nathan.terin@kidshelpphone.ca
Ontario - GTA	Norm Smyth	(416) 581-8970	norman.smyth@kidshelpphone.ca
Ontario – North and Central	Kendra MacIsaac	(705) 665-1143	kendra.macisaac@kidshelpphone.ca
Ontario - Eastern	Morah McDonald	(613) 294-2144	morah.mcdonald@kidshelpphone.ca
Ontario - Southwestern	Phil Winch	(519) 704-1182	phil.winch@kidshelpphone.ca
Quebec	Nicole Provençal	(514) 273-7007	nicole.provençal@kidshelpphone.ca
New Brunswick, Nova Scotia, Prince Edward Island	Shelley Richardson	(902) 457-0133	shelley.richardson@kidshelpphone.ca
Newfoundland and Labrador	Keri McGrath	(709) 237-1474	keri.mcgrath@kidshelpphone.ca

BMO Financial Group Divisional Communication Managers

Region	Name	Phone number	Email address
British Columbia and Yukon	Jacynthe Simard	604-665-7194	Jacynthe.simard@bmo.com
Prairies – Alberta, Saskatchewan, Manitoba and Thunder Bay	Laila Adam	403-503-6828	Laila.adam@bmo.com
Ontario – GTA	Heather O’Brien	416-927-2558	Heather.obrien@bmo.com
Ontario	Diane Roberts	519-633-2204	Diane.roberts@bmo.com
Quebec	Annie Karasferian	514-877-7759	Annie.karasferian@bmo.com
Atlantic – New Brunswick, Newfoundland and Labrador, Nova Scotia and Prince Edward Island	Melissa Dewolfe	902-421-3999	Melissa.Dewolfe@bmo.com