

The Rail Trail Fund Development Plan Okanagan Rail Trail Initiative April 12, 2016



Table of Contents

Introduction	1
Goals of the Campaign	1
The Fundraising Approach	1
A Network of Ambassadors and Campaign Partners	2
Types of Campaign Supporters	3
Raising the Money - Campaign Targets	3
Sponsorship	5
Supporter Recognition	5
Campaign Support Materials	5
Development Plan Management	6
Summary	6
Appendix 1 – Website Map	7
Appendix 2 – Overview of communicating timing	9
Appendix 3 – Key Messages by Audience	10



It takes a community to create a legacy

Introduction

This fund development plan is a community effort. The strategies in it are the result of collaboration with the Community Foundations, Trans Canada Trail, The Shuswap Trail Alliance, The Columbia Valley Greenways Trail Alliance, the Association of Professional Fundraisers, community groups and experienced fundraisers. The strongest part of this community driven development plan is the people currently involved, and more importantly, the people and organizations that will become involved once the official campaign begins.

This plan is developed from experience and knowledge. A report at the end of the campaign summarizing how the money was raised to build this magnificent trail will contain many items not included in this document. This plan will guide the initial implementation of the fundraising campaign and will evolve and adapt to meet the needs of the community. This campaign will achieve its target and the trail will be build. The people involved will ensure that goal is met.

Goals of the Campaign

- 1. To use a grass roots approach to motivate communities to come together and embrace this project as their own.
- 2. Develop ownership in each community to provide a base for trail stewardship once the trail is constructed.
- 3. To raise \$7.6 million to allow the IDT to build a hard-packed gravel trail from Coldstream to Kelowna.

The Fundraising Approach

Raising money for this project is a unique opportunity. The opportunity is to engage the community not only to make a donation, but to take ownership of the campaign and take pride in making this trial happen. Support for this trail is unprecedented. Over 10,000 people emailed the Okanagan Rail Trail Initiative indicating that they support the trail. A referendum on borrowing money to purchase the property brought out more voters than any other election in the District of Lake Country. Rail trail input sessions in March were extremely well attended with people excited to learn more. Community groups and service clubs are ready to help raise money. The community wants this trail. We have an unprecedented opportunity to engage the community and build this legacy together.

To facilitate this approach, The Okanagan Rail Trail Initiative (ORTI) will provide the organizational support to facilitate the engagement of individuals and organizations in the community to get involved. Our initial research, combined with feedback at the March open houses, has confirmed that individuals and organizations are eagerly awaiting the launch of the fundraising campaign. Overall, residents believe the trail will provide huge benefits to our communities and they want to make the trail happen as soon as possible. Thousands of individuals and many groups and organizations that want to see this trail constructed are willing to step up to donate and to encourage others to donate. This is what the community in the Columbia Valley experienced when they developed their fund development plan to raise \$5 million to build the Westside Legacy Trail connecting Invermere and Fairmont Hot Springs (www.ourtrail.org). They have met their initial one year goal and are now awaiting on matching funds to build the first section of their 25km trail.

A Network of Ambassadors and Campaign Partners

ORTI will engage the community by developing a network of Trail Ambassadors to reach out to friends, family, community leaders, clubs, service groups, businesses and other organizations. Trail Ambassadors will be supported by a website, traditional media, social media, and other communication materials. Trail Ambassadors will communicate the need for fundraising and encourage others to get involved in raising awareness of the project. The theme of the campaign will be 'Let's Make It Happen' (to be finalized by creative agency providing marketing services).

ORTI and Trail Ambassadors will also engage businesses, non-profits, service groups and clubs to support and expand the campaign. The Central Okanagan Foundation and the Community Foundation of North Okanagan have partnered to accept all donations and provide tax receipts. Sproing Creative, a website and marketing company, have partnered to design all communication materials and host the website. Discussions are also underway with other businesses and organizations to support and expand the reach of the campaign and several other organizations have been identified. ORTI, Campaign Partners, and Trail Ambassadors will all work to spread the excitement and inspire individuals and organizations to donate and/or raise.



By building a network of campaign partners, the campaign can reach a much larger community, reach funding targets faster, and building the trail sooner. It takes a community to build a legacy.

Types of Supporters

Similar to other fundraising campaigns, this fund development plan uses targeted strategies to engage different types of supporters. These include Trail Leaders, Trail Supporters, Trail Ambassadors, Campaign Partners, and the Business Community.

Trail Leaders (TL)

This group of supporters includes individuals and families that are known to support community efforts and are inclined to either have slightly active lifestyles or have family members who do. These supporters are part of a smaller group that will make a gift contribution of \$10,000 to \$250,000.

These supporters are often inspired to give by their peer's act of giving, therefore this group will be developed through personal networks. Trail Ambassadors will work with Trail Leaders to host 'kitchen table' discussion where friends and family are invited to discuss the development of the trail and the benefits it will provide to the community. Donation packages developed to support this group will be provided and follow-up will be completed by both the host and a Trail Ambassador. Initial testing of 'kitchen table' discussions was very successful resulting in several commitments to donate once the campaign begins.

Trail Supporters (TS)

This group includes individuals and families who will most likely be active users of the trail and is the largest group of supporters. These supporters will make a gift contribution of \$25 to \$5000. Some of these individuals and families have identified themselves through the okanaganrailtrail.ca website, social media or signed up at the recent community open houses. This group will also be reach through personal networks and supported through an email newsletter (mailed directly or forwarded from others), social media, news media, and communication materials. Supporters will be directed to the website for online donations or to the foundations for donations greater than \$1,000. Regular media updates with this group will keep them informed of any fundraising events, total funds raised to date, and progress with trail planning and development. This group will be an important source of donations as they will encourage friends and family to contribute to the development of the trail as well. (Note: this approach worked very well in gaining emails of support in the pre-purchase phase of this project).

This group will also be the primary source of *Trail Ambassadors (TA)*. Trail Ambassadors are volunteers that wish to officially encourage others to support the campaign. Trail Ambassadors will be given formal training in how to present the trail development project and will be supported by ORTI.

Campaign Partners (CP)

This group consists of community service clubs and organizations that promote and support tourism, outdoor activities and fitness. The goal with this group is to inspire them to host events and other activities to raise

awareness of the campaign, raise funds for the development of the trail and encourage their members to get involved. Presentations outlining the benefits to the community will be made to these groups and support will be provided by Trail Ambassadors.

Business Community (BC) – Donors and Campaign Partners

This group consists of businesses and business support organizations (e.g. Chamber of Commerce) that wish to support the community campaign through donations, encouraging their employees, customers and members to donate or get involved, or provide in-kind services or products to support the campaign.

Raising the Money - Campaign Targets

A focus of the campaign will be helping people to

- 1. realize that the trail will not be built until we, the community, raise the money to build the trail,
- 2. understand the costs associated with developing the trail,
- 3. imagine the benefits this legacy will provide, and
- 4. make a donation

To assist with understanding the cost to build the trail supporting communication material will outline the process and a breakdown of costs associated with the development of the trail. This will be reinforced by determining a cost per meter of construction and encouraging supporters to fund a meter. Donors will also be recognized by kilometers, meters, or portion of meters, funded. Total funding progress will also be expressed in meters to date.

The table to right provides a breakdown of donations by gift size.

Reaching potential supporters will be imperative to the campaign. Thirty thousand supporters providing an average gift of \$222 are required to raise the \$7.6 million to build the trail. We will get there by having friends, family, community leaders, clubs, service groups, businesses and other organizations reaching out to others to engage them in this campaign.

Gift (\$)	# of	Total (\$)
250,000	0	-
200,000	1	200,000
150,000	2	300,000
100,000	3	300,000
75,000	4	300,000
50,000	8	400,000
25,000	10	250,000
20,000	12	240,000
15,000	15	225,000
10,000	45	450,000
4,500	50	225,000
3,000	90	270,000
1,500	150	225,000
750	200	150,000
450	250	112,500
300	1,100	330,000
150	16,000	2,400,000
50	6,000	300,000
25	6,000	150,000
Total	29,920	6,627,500
Grants		1,000,000

It takes a community to build this legacy.

The assumptions and targets developed to achieve the gifts outlined in the table are provided below.

- Trail Leaders 35 kitchen table discussions will be held resulting in 3 gifts per meeting
- Trail Supporters 118,000 supporters reached 4 times (on average) resulting with 1 in 4 providing a gift
- Campaign Partners 40 organizations reached resulting with 1 in 2 raising funds
- Business Community 120 organizations reached resulting with 1 in 3 making a donation

Reaching supporters will be the task of Trail Ambassadors and Campaign Partners with support from ORTI.

To gain and keep momentum during the campaign, interim targets corresponding to the trail development process will be identified in partnership with the IDT. Experience from the Trans Canada Trail (http://tctrail.ca/) and Westside Legacy Trail (www.ourtrail.org) campaigns indicates that this strategy for large scale projects does build momentum, allows for matching grant opportunities and makes the campaign much more manageable.

The remaining source of funding for the project will come from grants. There are however limited grants (number and dollar amounts) for building trails that are available for non-profits to apply for. ORTI will continue to build a list of available grants, make applications and work with IDT on any municipal granting opportunities.

Sponsorship

Sponsorship requires more discussion. IDT and the municipalities will need to decide if they want sponsorship along this trail. If the IDT partners decide to endorse sponsorship, it would be best to prepare a strategy when trail amenities are better known. This would allow time for a better understanding of each municipality's bylaws, identification of physical opportunities for sponsorship and the ability to provide potential sponsors with traffic counts and projections to increase the value of sponsorship. Also, in the next year we will have a much better feel for how the balance of the fundraising is going.

ORTI is prepared to work with the IDT on sponsorship opportunities when opportunities arise.

Supporter Recognition

All supporters will be recognized on the campaign website on a 'digital wall of recognition' by the # of kilometer, meters, or partial meters of construction funded. There will be a digit wall for families and individuals and a second for organizations and businesses. There will also be a digital wall of recognition for campaign partners; businesses and organizations who are providing in-kind services and products to the campaign. Larger donations may also be recognized in partnership with the Foundations and other campaign partners through media events and releases.

Campaign Support Materials

All fundraising communications products are being developed with Sproing Creative. All materials will be coordinated and deliver key messages targeted to desired audience (see Appendix 3 for key messages by supporter type). Below is a table of many of the campaign support materials

Item	Purpose	Details/Call to action
Letter	Inspire Trail Leaders to donate and encourage others to donate to the foundations	This letter will detail the specific benefits that their donation will provide to the community and an overview of the costs of the trail. Instructions on how to provide gift to foundations. Call to action: 1) donate, 2) encourage network to donate

Item	Purpose	Details/Call to action	
Social media	To enable and inspire others to	Regular posts on fundraising progress, stories from the campaign	
	expand the reach of the	trail (stories of donors and supporters, events, etc.), and \$	
	campaign	needed for next phase of construction.	
		Call to action: 1) donate, 2) get involved, 3) encourage their	
		network to donate	
Videos	To inspire donations and get	This will include professional video along with contributions from	
	involved	trail supporters.	
		Call to action: 1) donate, 2) get involved, 3) visit the website	
Posters	To inspire donations and get	Visual with inspiring words directing people to the website.	
	involved	Call to action: 1) donate, 2) get involved, 3) visit the website	
Trailhead Signs	To inspire current trail users to	Signs on property indicating future location, the benefits of	
	donate and encourage others to	to developing the trail, and outlining the need to donate.	
	donate	Call to action: 1) donate, 2) get involved, 3) visit the website	
Presentations	To inspire other groups to raise	Presentations specific to each group highlighting the benefits of	
	money and/or to inspire	the trail and overview of costs to inspire them to raise money	
	individual donations	within their group or host events to raise money.	
		Call to action: 1) donate, 2) hosts events to raise awareness and	
		money	
Website	To inspire community	Details provide in appendix	
	fundraising and keep people		
	informed of progress		

Other communications tools will be developed as determined by Trail Ambassadors and Campaign Partners.

Development Plan Management

Dedicated experienced volunteers will manage the implementation of the development plan.

Regular results/planning meetings reviewing website, social media, event and donation metrics will be conducted with the implementation team. Strategies will be adjusted base on results with input from Trail Ambassadors and Campaign Partners. Key areas of the implementation plan have been assigned to leaders and/or coordinators. Updates will be provided to IDT bi-weekly.



Summary

Raising \$7.5 million will be challenge. It is a challenge however that this community is willing to take on. Discussion with Trail Leaders, Trail Supporters, Business and Campaign Partners indicate the community is excited and ready to make this trail happen. Partnering with the North Okanagan Community Foundation and the Central Okanagan Foundation and creating a network of Trail Ambassadors and Campaign Partners the campaign will reach and inspire trail supporters from Edmonton to Victoria to get involved and help make this trail happen.

Appendix 1 – Website Site Map

Top Level/Sub Page	Purpose	Content Required	Call to Action
Homepage	To get people engaged in the project to build the trail	 Inspiring introduction paragraph Inspiring images Donate Now Button Get Involved Button Progress to target fund raising (% to current target, total meters funded, # of donors). Note, we will need a message below indicating the current \$ amount target and why it is important. E-letter signup and social media Message at bottom – It will take a community to build a legacy 	 donate button get involved button sign up for updates (social media and e-news letter)
Our Trail	To motivate people to give a donation and get involved.	 Introduction recognizing work to date by government Benefits of the trail Inspiring images Donate Now Button Get Involved Button Link to subpage of constructing the trail Link to subpage of overview of project Link to Impact Assessment Report (or summary) Link to Map 	 donate button get involved button sign up for updates
Constructing a trail	Provide potential donors an understanding of costs and how their money will be used.	 Overview of how the trail will be constructed and associated costs. Will include phases of construction that will include targets and timeframe for funding. Images showing construction engineering and drawings Updates on trail development to date 	 donate button get involved button sign up for updates
Project Organizational Structure	Provide people clarification on who is doing what.	 Short description of each organization (IDT, each Foundation, ORTI, A map showing ownership of trail by municipality). Logos and links to each organization Donate Now Button Get Involved Button 	 Direct people to area to answer questions they many have Hit the get involved button Sign up for updates
Donate Now	Receive and/or direct donations	 Inspiring introduction paragraph Explanation of where donations are going and all donations will be used for trial development costs (notice: cannot direct your donation to a specific cost or section of trail) Explanation of Donating online vs writing a cheque to Foundations Explanation of how to donate directly to each Foundation Inspiring images Donate Now Button (online – Canada Helps) Get Involved Button Progress to target fund raising (% to current target, total meters funded, # of donors) E-letter signup and social media 	 Donate Get involved button Sign up for updates

Top Level/Sub Page	Purpose	Content Required	Call to Action
Get Involved	Inspire individuals and organizations to get involved in the campaign.	 Inspiring introduction paragraph Explanation how you can get involved – individuals as Trail Ambassadors, Clubs and Service Groups as fundraisers, Businesses and Organizations as fundraisers, Business and Organizations as campaign partners Inspiring images Donate Now Button Progress to target fund raising (% to current target, total meters funded, # of donors) E-letter signup and social media 	 Have individuals, clubs and service groups and Businesses/organiz ations submit information to get involved Spread the word of the campaign Help raise money Sign up for updates
Trail Supporters	To recognize trail supporters and to get individuals and organizations involved in supporting the campaign	 A short statement thanking all donors Inspiring images Link to Individual and Family Supporters Link to Organization/business Supporters Link to Campaign Partners Donate Now Button Get Involved Button Progress to target fund raising (% to current target, total meters funded, # of donors) E-letter signup and social media 	 donate button get involved button sign up for updates
Individual and Family donors	Recognize individuals and families who have donated	 Table of individuals and families by name and meters funded (ability to have part meters as well, sort by name and meters funded) Donate Now Button Get Involved Button E-letter signup and social media 	 feel recognized donate button get involved button sign up for updates
Business / Organization donors	Recognize businesses and organizations who have donated	 Table of businesses, organizations, clubs and service groups by name, logo and meters funded (ability to have part meters as well, sort by name and meters funded) Donate Now Button Get Involved Button E-letter signup and social media 	 feel recognized donate button get involved button sign up for updates
Campaign Partners	Recognize businesses and organizations supporting the campaign	 Table of businesses and organizations by name, logo and what their role is. Donate Now Button Get Involved Button E-letter signup and social media 	 feel recognized donate button get involved button sign up for updates
Events	Keep people informed of fundraising events	List of upcoming events in the community supporting the rail trail (open houses, milestone celebrations, fundraisers, etc.) Chronological List view. Could be calendar view if the events are too numerous.	 Have people attend events Event organizers upload event details for posting (FORM) Sing up for updates
Resources	Enable others to raise money for the trail	Enable others to raise money for the trail	Have supporters download information and help raise money

Appendix 2 – Overview of Communication Timing

TL – Trail Leaders, TS - Trail Supporters, TA – Trail Ambassadors, CP – Campaign Partners, BC – Business Community

Month	Task/Supporter Group	Communication/actions
April	Pre-launch build up	Use various tools (e.g. social media) to build excitement leading to day 1 of fundraising campaign.
	TL – Prepare for kitchen table discussions	Finalize materials and schedule kitchen table discussions
	TS – prepare for launch	Finalize website and all supporting material.
	TA – prepare for training	Development training process and material.
	CP - Meet with CS's in each	Provide overview of campaign and discuss possible fund raising events
	community	and the supporting materials required.
	BC – prepare for Launch	Develop list of targeted organizations.
April 25	Launch Campaign	Website live with ability to accept donations Press release to media
		Email first newsletter to existing supporters Social Media update (Facebook, Twitter, YouTube, Instagram)
May	Install Trail Head Signs	Inform people about the fundraising campaign
	Launch of Rail Trail Ale	Notice in newsletter, website, media release and social media
	TL	Continue to schedule kitchen table discussions
	TS	Engage through social media updates
	TA	Enlist through website and social media and host 1st training session
	СР	Request meeting/presentation to CS's not met with yet
	BC	Begin outreach
	Grants	Continue identifying and apply
	Campaign rally in each	Campaign events celebrating the start of the Campaign and announce
	Municipality	current funds raised to date
June	Make videos of key supporters	Send videos of supporters through social media (this will continue throughout the campaign)
	Start Billboard Campaign	Billboards in North and Central Okanagan (if required)
	TL	Continue to schedule kitchen table discussions and keep current donors updated.
	TS	Social Media, e-newsletter and Website update -# of supporters and meters funded
	TA	TAs hosting information sessions (coffee/wine talks) and supporting local community fundraising.
	СР	Follow-up on letter continuing to schedule meetings/presentations
	ВС	Continue outreach and keep current supporters updated.
	Grants	Identify and apply
July	Make promotional video	Distribute through social media
-	TL, TS, TA, CP, BC and Grant	With input from campaign partners and trail ambassadors, refine
	strategies refined based on results to date	strategies based on results to date and input from TAs and CPs
August	Plans will be developed based from results to date	

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Audience	Key Messages	Website	Social Media	Other communication Tools
Trail Leaders	 Highlight the benefit of the trail and the legacy it will provide. Show bigger picture (map) of how it can lead to a much bigger opportunity (not on website - just in package) Show breakdown of how 7.5 million dollars will be raised Show breakdown of costs and phases of construction Use the meters funded from other donors as incentive Updates on funding progress Updates on project milestones 	 Website to express a level of professionalism and contain facts with reference material Clearly articulate benefits on website and make it easy to find Explain breakdown of costs and make it easy to find 	Won't be targeted specifically by social media (however acknowledge that they may still subscribe)	Intro Letter: 1. personalized 2. Outline benefits 3. Outline costs 4. Stress legacy nature of project TL News Letter: (updates emailed) 1. Updates on funds raised Updates on project progression Media Releases: 1. Recognition
Trail Supporters: 3 types A) Excited and want to donate B) Excited and want to get involved	 The campaign has begun and it now time for you to contribute. Updates on funding progress Updates on project milestones Your full donation goes toward the develop costs of the trail (noting that donors cannot direct their gift to specific costs or sections of the trail) 	Instructions on how to donate - make it obvious and crystal clear Instructions on how to get involved- make it obvious and crystal clear Funding progress Project Progress	 updates on funding progress with reminders to go to the website to see the list of current supporters updates on events project progress update reminders to donate/get involved 	 e-news letter: reminders of need to donate and get involved funding and project updates reminders to go look at the trail supporters on the website
C) Know a bit about the trail and are now interested in learning more about	 Get them excited to donate and get involved Need to know about how the trail will benefit the community and create a legacy Need to understand the cost of constructing the trail and understand where their money will go Need to get them excited about the trail 	 Clearly articulate benefits Explain breakdown of costs Instructions on how to donate Instructions on how to get involved Funding progress Project Progress 	 Some posts include benefits of trail Some posts to include high level update on costs Some posts to include legacy aspect of project 	 Brochure: move people to website benefits of trail costs to build the trail Posters: motivate to go to the website
Potential Trail Supporters	 Understand the opportunity and how it came about (very brief). Need to know about how the trail will benefit the community and create a legacy. Need to understand why the trail cost so much, and understand where their money will go Need to get them excited about the trail 	Same as group C along with A very brief overview of how this opportunity came about	Same as groups A-C (when they become supporters and sign up.	Brochure: 1. move people to website 2. benefits of trail 3. costs to build the trail Posters: motivate people to go to the website
People who don't support the trail and/or have concerns	 Acknowledge that some people may have concerns and address them if possible. Stress the value of the trail to the larger community and the legacy it will provide. Provide details of the breakdown of the costs and a brief explanation of why they won't increase 	 Acknowledge that there are concerns Clearly articulate benefits Explain breakdown of costs Make it clear who to contact with questions and concerns 		

Audience	Key Messages	Website	Social Media	Other communication Tools
Trail Ambassadors	 Need to get the word out that the campaign needs trail ambassadors and inspire them to join Clear message on what their role will be and how they become ambassadors. Provide recognition for Trail Ambassadors. Provide support for their work on the campaign 	 Motivate people to become TA Clear instructions on how to get involved Materials supporting TA easily available 	Post motivating to become a TA	 TA News Letter: (updates emailed) Updates on funds raised Updates on project progression Information on any upcoming meetings Display Boards (to be used by TA) Clearly articulate benefits Explain breakdown of costs Motivate people to get involved Motivate people to donate
Campaign Partners	 Need to get the word out that the campaign needs partners and inspire them to join. Clear message on what their role will be and how they become campaign partners. In kind donations - be clear on the need (e.g. printers, t-shirt makers, etc.) Campaigners - raise awareness, host events, raise money, and inspire donations. Provide recognition for campaign partners. Provide support for campaign partner's work/events. 	Motivate organizations to become CP Clear instructions on how to get involved Materials supporting CP available	 Posts motivating to become a CP Post supporting CP events Post recognizing CP for their support in the campaign 	CP News Letter: (updates emailed) 1. Updates on funds raised 2. Updates on project progression 3. Information on any upcoming meetings Presentation: 1. Clearly articulate benefits 2. Explain breakdown of costs 3. Motivate them to become CP Display Boards (to be used by CP) 1. Clearly articulate benefits 2. Explain breakdown of costs 3. Motivate them to get involved 4. Motivate people to get involved 4. Motivate people to donate Media Releases: 1. Recognition and events
Businesses	 Highlight the benefit of the trail and the legacy aspect of it Show bigger picture (map) of how it can lead to a much bigger opportunity (not on website - just in package) Show breakdown of how 7.5 million dollars will be raised Show breakdown of costs and phases of construction Use the meters funded from other donors as incentive Updates on funding progress Updates on project milestones (estimated construction dates and current phase of construction) 	 Website to express a level of professionalism and contain facts with reference material Clearly articulate benefits on website Explain breakdown of costs 	 Some posts include benefits of the trail Some posts to include high level update on costs Some posts to include legacy aspect of project 	Intro Letter: 1. personalized 2. Outline benefits 3. Outline costs 4. Stress legacy nature of project BC News Letter: (updates emailed) 1. Updates on funds raised Updates on project progression Media Releases: 1. Recognition