

Champions Trophy
Case Competition 2016



Case Study:
UpsideDowns

Friday 29 January

Case prepared by Nathan George under the supervision of Tom Brash & Sunny Gu. This case has been prepared solely for the Champions Trophy Case Competition. All data in this case has been obtained from publically available sources and UpsideDowns Trust This case is not intended to serve as an endorsement, a source of primary data, or an illustration of effective or ineffective management.

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From: Warren Wallstreet
Sent: Friday 29th January
To: UpsideDowns Education Trust Project Team
CC: Charlie Charity; Susan Swaps; Melinda Margin; Bill Banker
Subject: UpsideDowns Education Trust Strategy Presentation

Good Morning team,

We have recently been approached by the UpsideDowns Education Trust, a charitable organisation that financially supports specialist speech therapy for Down syndrome children in New Zealand.

This one-on-one education is not publically funded, but is key to helping those with Down syndrome overcome developmental delay and enable them to talk sooner. UpsideDowns was founded in 2003 by a small group of parents looking to provide the best possible start for their own children with Down syndrome. UpsideDowns now supports 117 registered families across New Zealand, and is operated by one part-time staff member and nine hands-on directors of their board. Their goal is to support every child in New Zealand with Down syndrome that can benefit from specialist education. In 2015 UpsideDowns was forced to decrease the maximum annual funding available to its families from \$4,030 to \$2,000, as there was greater demand for its services and difficulties raising the required funds.

Chairman Adam Barker has asked us to analyse the charity's operations and provide a recommendation on how to achieve their goal. Specifically, we have been asked to consider the avenues of fundraising UpsideDowns should pursue and how it can engage with donors to achieve financial stability. Secondary to this, UpsideDowns is looking to educate New Zealanders on specialist education and Down syndrome. It is open to suggestions on changing the way it funds its member families.

You will have ten minutes to present your recommendations, which will be followed by a ten-minute question and answer session to clarify any issues that may arise from the presentation. Our research team has compiled some relevant information, which can be found in the attachment to this email.

Regards,

Warren Wallstreet
UpsideDowns Education Trust Project Leader

The idea





About UpsideDowns Education Trust

UpsideDowns Education Trust is a charitable organisation that financially supports specialist speech therapy for children with Down syndrome aged two to 18 New Zealand.

The Trust covers 80% of the cost of speech therapy sessions up to a maximum of \$150 per session and a total of \$2,000 each year for registered families.

UpsideDowns was founded in 2003 by a group of parents funding specialist speech therapy for their own children, over and above what is provided by the Ministry of Health.

The Ministry of Health provides some assistance to the speech development of children with Down syndrome such as supporting mother's to breastfeed as it develops facial muscles which are key to speech. Other support is scarce, however, until they attend school at five. These early years are where specialist education is most effective and has been shown to help overcome developmental delays.

At school, families will have some access to speech therapists and additional help in the classroom. But there are a range of issues. Public speech therapy sessions are not as regular as families would like. Also, the public system is responsible for large numbers of children with a broad range of needs, meaning therapists often change and do not specialise in helping those with Down syndrome. Further, health practitioners widely acknowledge that the developmental needs of children with Down Syndrome are often very different from child-to-child. The current health system does not provide a personalised approach, which leaves families who want their child to have the best chance at leading an independent life searching for alternatives.

117 families are currently registered with UpsideDowns, with the majority of children primary school age. The team has witnessed incredible progress of children who have been able to access to this education. Approximately 80% of the families attend regular therapy sessions and draw financial support from the trust. The other 20% are not currently attending sessions, but remain registered should they need assistance in the future.

UpsideDowns gathers donations and seeks to fund approved specialist education (with therapists registered with the New Zealand Speech Language Therapists Association) to all families in New Zealand that need and can benefit from it.

Staff and management

UpsideDowns has one part-time employee and the board of directors, consisting of nine volunteers.

The board is hands-on in both the operations and fundraising efforts of UpsideDowns. It operates out of the Chairman's home, from which he also operates his own business.

Financial support

Our funding typically covers the majority of the cost of therapy sessions, presuming reasonably regular attendance, but the cost for a family attending private speech language therapy can in some cases be up to \$5,000 per year.

Families can send an invoice to UpsideDowns any time in the three months following a session. This often results in multiple bills from a family being invoiced at one time. The regularity of therapy sessions will cater to each individual child's requirements and there is no expectation that families have a regularly scheduled therapy session. It is therefore difficult to predict both the amount and timing of funding that UpsideDowns will need to provide and in turn the fundraising it will need to meet these costs.

UpsideDowns is respected as a highly professional, well run charity, having gained some coverage through a series of campaigns. Of particular note was the 2009 edition of the TV series "Dancing with the Stars". One contestant, Barbara Kendall, a gold medal winning New Zealand Olympic sailor, nominated UpsideDowns as her charity. Viewers' votes doubled as donations and with Kendall taking second place overall, UpsideDowns received \$107,270. This gave UpsideDowns valuable national exposure, enough cash to allow an increase in registered families from 36, and build cash reserves. These reserves were managed so as to support families through to 2015, but have now been exhausted.



Waitlist

These uncertainties, coupled with funding limitations, mean that there are 26 families on the waitlist to register. Waitlisted families cannot yet receive support, but many elect to attend private speech language therapy at their own cost. They are registered based solely on their order of application, when either another family drops off the list or greater funding becomes available.

A family registering with UpsideDowns for the first time is required to pay a one-off fee of \$50. For each year after that, the \$50 required to sustain their registration is typically deducted from the first invoice a family submits in the new financial year. Where the family is not receiving therapy and has not invoiced the UpsideDowns, they are asked to pay the annual fee directly. UpsideDowns staff will be required to follow up unpaid fees on some registrations.

Member support

Those registered with UpsideDowns are referred to as member families. In return for the financial aid they provide, UpsideDowns asks its members to support the organisation. This support can come in the form of time, skills or connections to sponsorship opportunities. UpsideDowns believes many of their families don't understand its challenging financial situation. As a result, they have had difficulty gaining members' assistance in raising funds.

New member recruitment

Across all ages there are 3,122 New Zealanders receiving disability support services from the Ministry of Health due to Down syndrome. Within this, the number of families which have a child in the UpsideDowns age bracket and could benefit from specialist speech therapy is estimated to be between 500 and 1,000.

As UpsideDowns' register has been at full capacity for a number of years, advertising to let families know support is available has not been undertaken on a large scale. Regular emails are still received from families in need who have heard through word of mouth about the support UpsideDowns provides.

Choosing a speech therapist

UpsideDowns does not dictate which speech therapist families attend or which method of therapy is delivered, meaning families can attend their local provider and select a programme of their choice. Developing a relationship with a consistent therapist has been seen to improve development.





How specialist speech therapy works

Private speech therapists deliver personalised programmes, which typically involve one-on-one, heavily assisted learning of pronunciation, writing and communication skills. Session frequency ranges from once-a-week through to once-a-month depending on a child's needs and a family's financial situation. In-between sessions, parents practice assigned exercises every day with their child.

Sessions are one-on-one due to the different abilities and needs of children with Down syndrome. New Zealand does not typically have the concentration of children to facilitate larger sessions, with the possible exception of Auckland.

'Early intervention' education is the introduction of specialist education for children aged six-months through to five-years. It is not currently funded by the government. It has a profound effect on the development of children with Down syndrome, decreasing the average age at which they first talk from four to two.

Families can communicate with their children, increasing confidence and reducing unnecessary stressors. Without this early education, the developmental delay children with Down syndrome experience can mean a child feels isolated at school. A speech therapist is needed to help children with Down syndrome realise their full potential.

Feedback suggests that many parents would see a therapist on a more frequent basis if not for the high cost. Many families will look to see a government provided therapist as well.





Funding

In order to fund specialist education, UpsideDowns seeks a range of monetary contributions, goods and services. Monetary donations are the most useful, with over 90% of the donations received being applied directly to education. UpsideDowns' strength has historically been "high involvement" fundraising, with the board of directors leveraging their family and friends to donate, and also engaging with their employers and professional networks.

For organisations looking to support a charity for commercial benefit, UpsideDowns has a relatively small membership and low profile. Sponsors are made to feel part of the UpsideDowns family. Staff invite all commercial supporters to their events, thank them for donations and engage with them on social media. An effort is made to personalise all communication to sponsors. For example, organisations that donate goods or services to charity auctions receive a note thanking them for their contribution and explaining how much money it raised, along with a photo of the item at auction. As many items are of a lower value (such as a car wash kits), making each organisation feel that they are contributing something special to UpsideDowns can be difficult and time-consuming. Considering their small size UpsideDowns is able to produce extremely professional communications material, but goodwill an organisation receives from sponsoring specialist education is limited by the low community understanding.

UpsideDowns believe their low profile and low community understanding of specialist education may explain why they have had more success in developing relationships with small to medium sized businesses, with a more intimate customer base. Large companies will contribute auction items where a member of the UpsideDowns' network is employed, but if that employee leaves the organisation there has been difficulty renewing that sponsorship. UpsideDowns would like to develop a system of engaging with these sponsors to avoid this occurring, and to provide more stable funding. Ultimately, the board believes its funding needs will be met by a number of smaller donors, contributing \$20,000-\$50,000 each. However, all methods of fundraising are being considered. A description of the current funding avenues is provided below.

Website Donations

People can donate via the UpsideDowns website in easy multiples of \$10, up to \$100. Donations greater than \$100 can be made to UpsideDowns using the bank account number provided on their website, or through the link to the online payments system.

"Gift of Speech"

UpsideDowns provides donors the option to give the 'Gift of Speech.' This is a donation which contributes directly to speech therapy sessions. The Trust does not associate these donations with a specific child, meaning no family's maximum drawing increases from the \$2,000 per year following a donation.

Personal donations are paid up-front, while corporate donations are either paid upfront or through yearly instalments.

Gift of Speech – Personal	
Donation	Total Cost
1 speech therapy session	\$155
1 month of speech therapy sessions	\$310
6 months of speech therapy sessions	\$1,000
12 months of speech therapy sessions	\$2,000

Gift of Speech – Corporate	
Donation	Total Cost
\$800 per year for three years – annual payment	\$2,400
\$800 per year for three years – one off payment	\$2,400
\$1,600 per year for three years – annual payment	\$4,800
\$1,600 per year for three years – one off payment	\$4,800

Corporate Sponsorship

Zarbo Café and Deli in Newmarket, Auckland, donated multiple hampers for auction at Experience the Upside this year, and also catered the event. Zarbo's management team would like to further their support of UpsideDowns, and become a 'Gold Sponsor.'

UpsideDowns developed a tiered donation structure to present to Zarbo's and future potential corporate sponsors. As a new initiative, this is yet to be advertised on the Trust's website. Annual donations are in the form of cash or in-kind donations. In-kind donations, such as catering for an UpsideDowns event, contribute toward the annual donation at 50% of the value. For example, if an organisation donates \$1,000 of catering services, UpsideDowns values this contribution at \$500 toward their annual donation.

Corporate Sponsorship	
Level	Annual Donation
Bronze	\$2,000
Silver	\$4,000
Gold	\$10,000



Share the Dream

UpsideDowns's cornerstone event has been 'Share the Dream' an annual gala dinner where attendees purchase tickets and bid at a charity auction. 'Share the Dream' tickets are typically sold for \$150 with the majority of this revenue going toward the venue costs. Everything from food hampers to holiday packages are auctioned off for the cause. For companies, especially smaller ones, the donations are often significant. Additionally, a large audience needs to attend with buyers who are willing to spend large sums of money on these items. The UpsideDowns team accordingly undertakes significant work promoting the event, using their social media presence and sending invitations to prior donors.

'Share the Dream' was not hosted in 2015, for reasons including a change in the UpsideDowns chairperson. UpsideDowns are looking to hold 'Share the Dream' again in 2016.

Experience the Upside

In late 2014 and 2015, UpsideDowns hosted a more accessible auction, naming it 'Experience the Upside.' Hosted at the Giltrap Audi showroom, the event had a shorter format and a lower ticket price of \$30. This ticket included drinks on arrival and canapes. The real success of the evening was the speech given by Alex Snedden, a 27-year-old man with Down syndrome and a speech language therapy recipient. He communicated just what this therapy can do for the life of a child with Down syndrome, a moving and educational experience for those yet to see the benefits firsthand.

Dine by Donation

Merediths Restaurant offers an intimate atmosphere and upper-class degustation menu close to Auckland's city centre. On Tuesday evenings Merediths hosts charitable dinners, choosing a partner charity for each month. UpsideDowns was fortunate to be this partner in September and October of 2015. The Trust's success in their initial two months led Merediths to offer them a third month in November of 2015.

Merediths has received many awards, including Cuisine magazine's restaurant of the year in 2011 and founder Michael Meredith being twice named outstanding chef at the Auckland hospitality industry's Lewisham Awards.

Merediths prepares the four-course meal and invites all patrons on the night to donate an amount of their choice to the charity as payment. UpsideDowns does not pay Merediths for this service, and uses their social media presence to ensure that the meal is fully seated. Merediths also advertises the partner charity for each meal on their webpage.

Merediths is a regular contributor to multiple larger charities, and raised in excess of \$60,000 in 2015. UpsideDowns received a large proportion of this, with \$33,250 being raised across the three months. As the smallest of the charities Merediths partnered with, the amount raised was a testament to the professionalism of the team at UpsideDowns and the willingness of people to support the cause.

Community Trusts

UpsideDowns applies for grants from community trusts annually. Community trusts typically determine the amount organisations receive according to the total amount they have to distribute and the size of each organisation's financial need. As more charities have applied for grants in recent years, UpsideDowns has received markedly less funding.

UpsideDowns believes community trusts give preference to organisations delivering services of a more general nature than specialist education. They also find that some New Zealanders perceive people with Down syndrome to be well supported by the government, and are yet to be convinced speech therapy is necessary. These factors may have contributed to the recent decline in the funding UpsideDowns has received from community trusts.

Regular Giving

The 1% Collective is a New Zealand charity making it easy for people to give 1% of their salary to support a collection of causes. 1% is based on the principle that if everyone were to donate a small amount of what they earn, the world would go a long way toward eradicating poverty. It is a system which has resonated with New Zealanders, and is backed by multiple TV personalities. There is a select group of 50 people donating an elevated amount of \$20 a week, and a wait list to be part of this group. As the collective look to make giving 'cool' in New Zealand, this is a positive sign they're starting to succeed, albeit on a small scale at this stage.

UpsideDowns recognises that a regular giving system could go a large way to meeting their financial needs, and has started their own programme which is separate to the collective. Donations can be made directly, or through the employer's payroll system. There are only three contributors at this point, but UpsideDowns are looking for advice on how this might be expanded, and how to capture the public's interest.

Quiz Nights

UpsideDowns hosts a themed quiz night annually at a local primary school. Teams of 8-10 register for the quiz at a cost of \$20 per person, donated directly to UpsideDowns. Both individuals and commercial sponsors offer donations and assistance. UpsideDowns also asks for donations of beer, wine and juice. These beverages are then sold at the quiz to raise further funds.





The Future of UpsideDowns

UpsideDowns defines success as making specialist education available to all children with Down syndrome in New Zealand. Progress has been made, but there remains a large number of children not currently registered with the Trust who would benefit significantly from specialist education. As a relatively young organisation relying on volunteers, UpsideDowns has been effectively operating by seizing fundraising opportunities as they present themselves, as well as helping the families who discover them. Decreasing the maximum funding available for member families in 2015 was a difficult decision for UpsideDowns and highlights the growing imbalance between the demand for their services and the ability to raise funds. UpsideDowns is now at a stage where it is considering whether it is operating in the best possible way, and what the best long-term approach is to achieve their goal.

A key focus for the organisation is to increase the stability and consistency of funding moving forwards. Though UpsideDowns runs a variety of different fundraising events, many of them rely on the same pool of generous contacts to be donors. The organisation is accordingly looking for ways to broaden this group. Additionally, UpsideDowns has no guaranteed funding sources that extend even one year into the future, calling into question whether other avenues of fundraising should be explored.

Were larger corporates to be considered, UpsideDowns believe that they need a consistent method of engagement which allows the relationship to spread beyond the initial contact.

For a small charity, UpsideDowns has an operational goal that is very ambitious from a funding perspective. However, the government would not consider the amount required to fully fund speech therapy for children with Down syndrome a large amount.

Though it is not believed to be publically funded in any other country, UpsideDowns still have to consider whether they would be better to use their resources to lobby government for public funding of specialist education.

Public understanding of Down syndrome, the benefits of specialist education and the UpsideDowns Educational Trust remains low in New Zealand.

Over the years UpsideDowns has operated, the team have witnessed amazing changes in children's lives. However, communicating this to potential supporters remains a challenge. The board believes if the community understands Down syndrome and specialist education they have a better chance at gaining financial support, and will make New Zealand a better place for people with Down syndrome to live.

UpsideDowns' primary means of supporting families is the financial aid they provide. The Trust also acts to link a network of families who share the challenges that come with Down syndrome. In 2015 this provided the grounds for the Trust to collaborate with the Auckland Down Syndrome Association and hold a fun day for combined member families at JUMP Trampoline Park on the North Shore. Wider forms of support like this are considered to be beneficial for the child and the family as a whole, and UpsideDowns hope to further develop this community in the future.

The Trust to date has not engaged in significant advertising to families in order to increase membership, given their financial limitations. As more families hear about the Trust, UpsideDowns have considered prioritising funding by the level of need. The Trust is considering how such a system would operate, and whether it would be a better way of achieving their goal.

The Trust recognizes that regular giving is something that they would like to focus strongly on in the future and be a major area of expansion. This is in recognition that most other charities rely on this method of income to survive.



Financials

Income Statement	YE2006	YE2007	YE2008	YE2009	YE2010	YE2011	YE2012	YE2013	YE2014	YE2015
Income										
Membership and joining fees	\$3,313	\$1,675	\$2,550	\$2,600	\$4,700	\$5,950	\$2,900	\$5,950	\$5,080	\$3,400
Grants	\$0	\$30,430	\$6,000	\$19,400	\$24,989	\$71,958	\$20,203	\$31,508	\$31,275	\$5,950
Donations	\$19,053	\$2,461	\$480	\$241	\$28,005	\$43,036	\$65,817	\$17,464	\$44,978	\$5,581
Share the dream	\$33,778	\$69,971	\$73,325	\$88,862	\$95,006	\$105,735	\$12,900	\$135,751	\$110,029	\$73,824
Quiz night									\$9,555	
Experience the upside										\$23,912
Dancing With the Stars					\$107,270					
Other income	\$200	\$6,137	\$2,210	\$1,958	\$3,839	\$6,250	\$6,315	\$17,642	\$9,184	\$9,654
	\$56,343	\$110,674	\$84,564	\$113,061	\$263,809	\$232,928	\$108,135	\$208,315	\$210,101	\$122,321
Cost of income										
Membership and joining fees										
Grants										
Donations										
Share The Dream Function	\$0	\$37,577	\$40,572	\$45,541	\$58,958	\$46,847	\$16,374	\$35,134	\$27,053	\$38,576
Quiz night										
Experience the upside										
Dancing With The Stars	\$0	\$0	\$0	\$0	\$3,890	\$0	\$0	\$0	\$0	\$0
Other income										
	\$0	\$37,577	\$40,572	\$45,541	\$62,848	\$46,847	\$16,374	\$35,134	\$27,053	\$38,576
General expenditure										
Subsidies Paid	\$42,876	\$35,074	\$57,607	\$64,214	\$87,614	\$87,573	\$113,005	\$108,756	\$144,182	\$137,186
Administration Expenses	\$573	\$313	\$186	\$14,446	\$13,442	\$11,288	\$19,425	\$20,584	\$21,320	\$12,987
Other overheads	\$1,065	\$7,118	\$2,804	\$4,283	\$18,171	\$5,979	\$1,952	\$3,901	\$7,160	\$5,295
	\$44,514	\$42,505	\$60,596	\$82,942	\$119,228	\$104,840	\$134,381	\$133,241	\$172,662	\$155,467
Surplus	\$11,829	\$30,593	-\$16,604	-\$15,422	\$81,733	\$81,241	-\$42,621	\$39,939	\$10,386	-\$71,723



Movement in Equity	YE2006	YE2007	YE2008	YE2009	YE2010	YE2011	YE2012	YE2013	YE2014	YE2015
Opening Balance	\$31,441	\$43,270	\$73,863	\$57,260	\$41,837	\$137,405	\$218,646	\$176,025	\$215,965	\$226,351
Plus Surplus/ (Deficit)	\$11,829	\$30,593	-\$16,604	-\$15,422	\$95,567	\$81,241	-\$42,621	\$39,939	\$10,386	-\$71,723
Closing YE Balance	\$43,270	\$73,863	\$57,260	\$41,837	\$137,405	\$218,646	\$176,025	\$215,965	\$226,351	\$154,628

YE2016 Income Statement	Apr-15	May-15	Jun-15	Jul-15	Aug-15	Sep-15	Oct-15	Nov-15	Dec-15
Income									
Membership and joining fees	-	-	-	550	50	-	-	-	-
Grants	6,000	5,000	-	-	-	-	-	3,000	-
Donations	10	10	1,060	4,010	10	2,310	310	15	-
Quiz night	0	10,155	20	-	-	-	-	-	-
Experience the upside	-	-	-	-	-	-	530	43,796	-
Meredith's dine by donation	-	-	-	-	-	-	10,771	14,413	8,066
Interest Income	-	9	7	1,454	192	151	133	149	129
Online auction	-	-	-	-	-	505	-	-	-
Other fundraising	36	-	-	191	-	-	179	2,166	-
Total Income	6,046	15,174	1,087	6,205	252	2,966	11,923	63,539	8,195
Cost of income									
Quiz night	-	345	-	-	-	-	-	-	-
Experience the upside (direct costs)	-	-	-	-	-	-	-	2,185	-
Online auction	-	-	-	-	-	10	-	-	-
Other fundraising	-	-	-	-	-	-	150	351	-
Total Cost of Income	0	345	0	0	0	10	150	2,536	0
Gross Profit	6,046	14,829	1,087	6,205	252	2,956	11,773	61,003	8,195
Less Operating Expenses									
Subsidies Paid	14,277	11,943	16,577	12,619	13,468	14,670	12,587	16,891	14,349
Administration Expenses	108	68	68	343	68	68	68	155	120
Other overheads	53	68	54	287	67	48	53	56	52
Total Operating Expenses	14,438	12,079	16,699	13,249	13,603	14,786	12,708	17,102	14,521
Surplus / (Deficit)	-\$8,392	\$ 2,750	-\$15,612	-\$7,044	-\$13,351	-\$11,830	-\$935	\$43,901	-\$6,326

Notes to the Financial Statements:

- These financial statements are prepared in respect to the financial year ending 31 March.
- UpsideDowns incurred costs while hosting minor events. These costs have been attributed to the general expense account until the 2015 financial year. In the 2016 financial year UpsideDowns transitioned to a new accounting system. Cost allocation will become increasingly specific as a result.
- In the 2015 financial year UpsideDowns hosted both 'Share the Dream' and 'Experience the Upside' events. In the 2016 financial year, it only hosted 'Experience the Upside.'
- The majority of UpsideDowns assets are held in cash.
- Income statement figures for December 2015 are not yet fully updated. However, donations received from Meredith's Restaurant in this month are correct.



Appendices

Appendix A - Relationships with Similar Organizations

The UpsideDowns Educational Trust does not have formal relationships with other charitable organizations, but will collaborate where it benefits both parties. Charities which work toward a similar cause in New Zealand are shown below.

Auckland Down Syndrome Association (ADSA)

ADSA looks to promote the involvement of people with Down syndrome in the community. They run social clubs and training courses for those looking to teach people with Down syndrome and a variety of other events. This included the fun session hosted at JUMP Trampoline Park with UpsideDowns for combined member families.



New Zealand Down Syndrome Association (NZDSA)

NZDSA performs similar services to ADSA, but on a national scale. It also hosts the NZDSA National Achievement Awards, recognising the accomplishments of people with Down syndrome in their communities.



IHC

IHC is New Zealand's largest provider of services to people with intellectual disabilities and their families. IHC has significantly greater resources than UpsideDowns, and does not focus specifically on the specialist education.



The Starship Foundation

The Starship Foundation is a social-profit organisation which looks to raise funds to support Starship Children's Health operate as a dedicated hospital for children and major teaching centre. Starship is one of New Zealand's most well-known charities, and receives significant community support. Commercial sponsors are asked to partner with The Foundation, and become a 'champion for children's healthcare in New Zealand.' There are a small group of large 'Five Star' Partners, options to donate from your weekly salary, and encouragement to engage your organisations' staff in setting up Starship fundraisers.





Appendix B

UpsideDowns member families map.





Appendix C

Experience the Upside Auction Flyer

The flyer shows a selection of those items auctioned live at Experience the Upside. There were further silent auctions on the night, and a collection of set-price items (primarily donated vouchers) were also sold.



Live Auctions



Lot 1: Ma'a Nemu signed rugby boot



The explosive Ma'a Nemu has built a reputation as one of the toughest forwards in world rugby. Able to break the line, all head the ball and set up or score devastating tries. Having just played his final game for the All Blacks in the winning 2015 Rugby World Cup match, think a great opportunity to get your hands on a piece of history. Donated by: Neil for Ma, Avel and Vanessa Ford, Value: Priceless

Lot 6: Crane experience at the Ports of Auckland



Across two terminals, eight cranes load and discharge ships ranging in size from Pacific Island and coastal operators to international carriers. All of the cranes have the capacity to lift two 20-foot containers at a time. This auction is for people who will be taken up one of the Ports of Auckland cranes. There are 05 cranes and can carry 40-65 tonnes, depending on the crane. This voucher must be redeemed Monday - Friday. Donated by: Ports of Auckland, Value: Priceless.

Lot 2: Wva restaurant review with Jesse Mulligan



Jesse Mulligan is the current coaling and editor for the NZ Herald's Wva magazine and hosts Radio NZ National from 3 to 5pm, weekdays. Jesse became a household name thanks to his appearances on 7 Days, Seven Sharp and Real TV. Wva auction is for 2 people to accompany Jesse on a Monday dinner value: \$700. Donated by: Jesse Mulligan, Value: Priceless

Lot 7: Brendan Barrett merchandise



All Black Brendan Barrett has reached legendary status after his first minute by the boot of the 2015 Rugby World Cup. The game is clearly who grows the future. Kevin also played for South Islands and the Hurricanes, and his love for rugby. Brendan also the proud big brother of a young boy who has Down Syndrome, and he's only too happy to support the UpSideDowns Education Trust. Donated by: Brendan Barrett, Value: Priceless

Lot 3: Diamond earrings



These gorgeous 6.2 carat diamond studs are mounted in brilliant plated 18ct white gold. They make the perfect Christmas gift for someone special... or maybe yourself! The earrings come with a Good Job certificate. Donated by: Elizabeth on Richmond, Value: \$1200

Lot 8: 9-course degustation dinner for 4 at Merediths



The recipient of multiple accolades, and considered one of the best restaurants in the country, Merediths restaurant in Mt Eden offers an intimate dining experience. Located on the perfect harmony between remarkable food, superb wine and tranquil hospitality. This auction is for a Saturday night 9-course degustation dinner for 4 people. Donated by: Michael Meredith, Value: \$650

Lot 4: TV3 newsroom experience



Experience the news from the other side of the screen! This is a fantastic opportunity for 4 people to tour the TV3 newsroom, meet the newswriters and behind the scenes as the news goes to air. Hang out with the TV3 news anchors and hear how they make the occasional slip-ups work. 1 for use before 18th December 2015 or from February 2016 onwards. Donated by: TV3, Value: Priceless

Lot 9: iPhone 6s



With 2D Touch, Live Photos, 7000 Series aluminium, the A9 chip, advanced T2 equipped (iPhone 6s), a 4.7-inch Retina HD display and so much more, you'll love the iPhone 6s. This auction is for a silver, 64GB iPhone 6s. Donated by: Spark, Value: \$1200

Lot 5: At home dining experience with Chef Paul Duncan



Enjoy the ultimate restaurant experience in your own home, and treat your guests to an evening they will never forget. Chef Paul Duncan will provide all food, cooking equipment, plates, cutlery, and will completely set up the table to suit the occasion. Paul is a highly skilled chef who delivers an exceptional dining experience, combining Asian and European flavours. Donated by: Paul Duncan, Avon Catering, Value: \$480

Lot 10: Give Tom a new middle name!



Tom Pooley, your charming MC, and a dedicated UpSideDowns board member, has generously volunteered to change his own middle name to anything of your choosing! This could be your opportunity to do something kind and impactful. It's not every day you get to change someone's middle name, but if you do, you are only limited by your imagination. Compare names, silly names - you name it! Donated by: Tom Pooley, Value: Priceless

Experience Packages (Silent Auctions)

- Experience The High Seas**
 - 1 hour 20 min Cruises overnight cruise for 2 people
 - Booze Society Gin
 - Donated by Hauraki Bay Cruises and Reggae Society Club, Value \$700
- Experience Central North Island Family Adventure**
 - One night's accommodation at Rangitiki Executive (Whangarei)
 - 10 Day + 500km family pass - only and visit to geothermal valley, Pohorua geyser, KAWAI carving and weaving school, 100 bird house & cultural per experience
 - Orakei Korako Cars & Thermal Park family pass
 - Donated by Rangitiki Executive, Te Aro and Orakei Korako Cars & Thermal Park, Value: \$942
- Experience Splendour and Adventure in the Comandant Peninsula**
 - Half day rock climbing eco-tour at Cathedral Cove for two people
 - One night at 600 levels Bay (Whangarei)
 - Hotwaterworks rocks with kayak, plus boat trip on the Huihe Explorer
 - Donated by Cathedral Cove Kayak Tours and 670 Lonely Bay, Value \$1630
- Experience Wellington**
 - 10 Days family introduction tour voucher (2 adults + up to 3 children)
 - 10 Days family Cardwell Early Bird Entry voucher (2 adults + up to 3 children)
 - One day fishing with Peter Lamb in Wellington
 - Overnight stay in an Executive King Suite at the Museum Hotel Wellington
 - Donated by Te Papa, Peter Lamb and Whareroa Hotel Wellington, Value \$500
- Experience Wanaka**
 - 5000 Delta Golf vouchers, 20 minute 18 hole experience over Wanaka with UHFV
 - Donated by Delta Golf and UHFV, Value \$380
- Experience Queenstown**
 - 2 nights 2 bedroom rental for up to 4000
 - 1000 scenic scenic helicopter flight landing for 2
 - Donated by City Cottages with Chateau Glenorchy, Value \$1415
- Experience Taste**
 - 10 boxes of 100 Degree products
 - All 100 Degree products
 - All Good Organics hampers: business classic, cap and 1 share
 - 100 Degree 4.5L cooler + 2 bottles
 - All good organic and vouchers
 - Donated by 100 Degree, Fitz & Fogg, All Good Organics, Fitz T and Allpress, Value \$273
- Experience Glamour**
 - 10 boxes of 100 Degree products
 - 1000 scenic scenic helicopter flight landing for 2
 - Donated by Logan Brooks-Cosmetics/Beauty and Woe Hair & Beauty, Value \$340
- Experience Style**
 - 10 boxes of 100 Degree products
 - 1000 scenic scenic helicopter flight landing for 2
 - Donated by 100 Degree, Fitz & Fogg, All Good Organics, Fitz T and Allpress, Value \$273

To make payment voucher and/or cheque collection at the end of the evening, we've organised several payment options. At the conclusion of the live auction, please take your winning bid sheets and select one of the following: 1. Use of Eftpos / Credit Card / Cash, 2. Access your online banking from one of our laptop stations, 3. Pay the required amount from your bank's mobile app to 12-3049-010703-00 and be sure to show a staff member your proof of payment. You may wish to view our account at a point ahead of time. Please hand over winning bid sheet to a staff member.

www.upside-downs.co.nz

2015 Experience the Upside - publicly auctioned items, Thursday 19th November | Giltrap Auckland, 1900 Canal North Road, Grey Lynn

www.upside-downs.co.nz

- Experience HOTBOTS**
 - 1000 scenic scenic helicopter flight landing for 2
 - Donated by 100 Degree, Fitz & Fogg, All Good Organics, Fitz T and Allpress, Value \$273
- Experience Doggie Delight**
 - 10 boxes of 100 Degree products
 - 1000 scenic scenic helicopter flight landing for 2
 - Donated by 100 Degree, Fitz & Fogg, All Good Organics, Fitz T and Allpress, Value \$273



Appendix D

Alex Snedden's speech at Experience the Upside

Good evening, friends. My name is Alex. I would like to share with you how Speech Language Therapy has helped me.

I have had the same speech therapist, Anne, since I was 5 years old, nearly my whole life, and we are now good friends. I still speak to her on the phone 3 times a week. She sometimes helps me with my problems. I was very shy and wouldn't talk but now I never stop (and that's Anne's fault).

It was, and still is, very important to learn things that are useful to for me. Doing things that don't seem practical are not for me. I can still remember learning to say my good friends name, "Benedict," and "chocolate" so I could order a chocolate muffin for school lunch, and also "Remuera" because that's where I live.

We worked on lots of sounds to make my speech clearer, new words and school speeches. We discussed problems and worked together to find solutions. I now help my friends when they have problems.

Speech therapy never really stops. Just like learning, it goes on for life. There is always something to practise and learn.

Speech therapy has helped me to develop confidence in myself and truly believe that I can do things. Just looking at the list of places I have visited to speak about my amazing life will show you how much I believe in myself.

Thank you.





Appendix E

Member involvement in UpsideDowns activities



Introducing us to potential business sponsors

Many businesses support charities through employee plans, payroll giving, related charitable trusts or directly. Other businesses could support us directly through sponsorship.

If you know a business that you think might be willing to support the Trust and could make an introduction we could arrange a presentation by the Trust to them.

Help us stay in contact with other members

We aim to touch base with all our members twice a year. You could help us by joining the team who call our members and talking to them about topics like how their child is going with their therapy & how the Trust's support is working for them. This would also involve writing up brief notes from the call for our records.

Help us to tell our story

We are always on the look-out for news stories about our kids, great photos that we can use and any other content that we can share on our website and in our newsletters. Occasionally we need kids and their parents to act as our ambassadors at events like a presentation to a sponsor.

Use your skills and services

We use the services of printers, designers, writers, website developers and other people who can help us to promote ourselves. If you have these skills and could give us some time that would be great.

If you have other skills and would be willing to give some of your time how about posing us the challenge of how to make the most of that? One great way would be to donate some of your time as an auction item at the Share the Dream Gala dinner or our quiz night.



Member involvement in UpsideDowns activities

The UpsideDowns Education Trust is a membership-based organisation. The families that the Trust supports are **members** of the Trust. In return for the Trust's support its members are asked to also support the Trust in ways that they can manage. Support could come in the form of time, skills or connections. This note describes some ways that parents and other friends and family can get involved.

Get involved in our Auckland-based fundraising events if you live in Auckland

Our main fundraising event is the Share the Dream Gala dinner which we usually have in August. We also run a quiz night in March or April. Both events have their own organising committees. Tell us if you would like to be involved in running either of these events.

If you don't want to get directly involved in the organisation of events but still would like to support there are a number of ways that you could help. Some examples include:

- Coming along and bringing friends with you to create a table
- Asking businesses you know to donate products or services that we can offer at the auctions that we hold at our events
- Ringing other members or businesses to encourage them to come along or buy a table
- Approaching businesses to support

Run your own fundraising activity – anywhere!

Every year some of our members (or their friends and family) take the initiative and do something to raise some money. You could:

- Run a quiz night – we can offer a set of ideas on how to go about do this based on our experience of running two successful events so far
- Get sponsored to run a marathon and use fundraise online to gather sponsorship
- Organise a sausage sizzle
- Ask if the UpsideDowns Trust could be charity of the month at your kids' school
- Check out the ideas at <http://www.fundraisingideas.org.nz/diy.aspx>

Finding auction items

One of the main sources of income at any of our fundraising events is money earned from auctions of donated items. One way that any member of the Trust can help us out is by approaching businesses to donate their products and services. Many businesses will happily donate as it costs them less to give than the Trust can make when it is auctioned.

Auction items can range in value from \$20 to \$20,000. Typically more valuable items will be auctioned live and smaller items sold at a silent auction. Often the best auction items are simple things that everyone uses regularly.



Appendix F

Newspaper article

Cash pours in for dancing weatherman

4:00 AM Wednesday Aug 12, 2009

Australasia

Community Service

Dancing With The Stars

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Weather presenter Tamati Coffey proved a champion fundraiser on Dancing With The Stars this year as well as the champion dancer.

Votes for Coffey during the television show raised \$259,990.79 for his chosen charity, Rainbow Youth.

TVNZ said it was a record amount earned by a charity from the series and it was more than half of the provisional total amount of \$433,053.81 which was raised during the series. Runner-up Barbara Kendall's charity UpsideDowns Education Trust did next best with \$99,009.02, with semifinalist Josh Kronfeld's charity Koru Care Otago third with \$37,276.01.

Geraldine Brophy's charity Arthritis NZ received \$24,795.53, Rebecca Hobbs' charity NZ Spinal Trust \$6664.74, Chris Hobbs' charity Ronald McDonald House \$3256.69, John Rowles' Project Hope Foundation \$1425.81, and Lizzy Igasan's Go Red For Women \$635.22.

Dancing With The Stars has now raised more than \$1.75 million for New Zealand charities in its five seasons.

TVNZ head of television Jeff Latch said all money raised from public votes went to the charities once service provider charges were taken out of the cost of voting.

- NZPA





Champions Trophy

Case Competition 2016



BUSINESS SCHOOL