



INITIATIVE  
**UN MONDE À PARTAGER**  
**SHARED WORLD**  
INITIATIVE

# Participant Fundraising Guide



All photography and content provided by Tara MacDonald, May 2007

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# **SHARED WORLD INITIATIVE:**

## **Vision:**

The Shared World Initiative is a student-led organization focusing on multidisciplinary teamwork, global partnerships and sustainable development. It is in essence a means whereby students at the University of Ottawa can gain credible, academically recognized real-world experience in the field of international development thus reinforcing their relationship and responsibility to the global community.

Multidisciplinary is at the heart of the Shared World Initiative's vision. This stems from our fundamental belief that development work can be greatly enhanced if it includes a variety of different expertises working together toward a shared objective. We consider university to be the ideal setting where this variety of expertise can coalesce.

The Shared World Initiative believes that working in a close alliance with partners in the developing world is the only way to properly understand realities on the ground level. Thus, it is engrained within our philosophy that partnership is the only way in which to build truly sustainable, efficient and culturally-appropriate development projects.

## **What we do?**

The Shared World Initiative engage students to work in multidisciplinary teams to build sustainable international development projects which respond to needs identified locally by vulnerable populations in developing countries. We also aim to have community work recognized academically within each faculty at the University.

We offer exciting volunteer learning opportunities in Lusaka, Zambia during the student's academic term. During this time, students have the chance to make a

tangible difference in the lives of people living in disadvantaged communities. Along with our development partners, SWI provides participants the opportunity to grow and experience a new culture while applying classroom knowledge and theory to 'real life' international development projects. Students also gain valuable new skills such as:

- A better understanding of global issues and perspectives
- Increased cultural sensitivity and an appreciation of diversity
- Willingness to accept new challenges
- Improved interpersonal and communication skills
- A new level of maturity and independence
- Confidence in your individual ability to effect change.

### **Pilot Project - Zambia:**

For it's second year running, the Shared World Initiative will continue its focus on responding to community needs identified during an exploratory mission to Lusaka, the capital of Zambia, during the summer of 2007.

In the summer of 2008, participants in the Shared World Initiative will work in multidisciplinary teams and in a close partnership with students at the University of Zambia and local community members, leaders and experts from well-established Zambian organizations such as the Bwafwano Community Health Care Clinic. Together, they will conceive, develop, and implement projects in the Lusaka area.

### **Academic process:**

The Shared World Initiative placements in Zambia entail a six-credit process. Selected students will obtain three credits to complete a formative university course in international development, and another three credits for an 8-week placement in Zambia.

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# **INTRODUCTION:**

## **Fundraising Guide Aim:**

The overall aim of this guide is to provide the reader with a cursory view to personal fundraising. Created in the fall 2007 session as a Community Service Learning project for the University of Ottawa, this guide is aimed at World Share participants. As such, some of this information may be dated but will nevertheless give the reader incite into what fundraising is, how to get started and some of the various opportunities available to them as SWI participants.

Many of you may have had the opportunity to fundraise in the past, whether it was for local service organizations, school clubs or religious organizations such as church dinners or food drives. All of the skills that you developed during these experiences will help you achieve your SWI fundraising goals. Nevertheless, it is important to remember that fundraising is hard work that requires diligence, determination and confidence. You may be faced with people who don't believe in what you plan to do, many doors may be shut in your face and you may feel as though your target goals are unattainable. Don't give up! With a good strategy, some hard work, a reasonable amount of time to prepare, and optimism you will succeed.

The Fundraising Guide attempts to provide SWI participants with the knowledge, tools and skills to achieve their fundraising targets. While much information is provided in the Guide, it is not expected that you follow every suggestion listed. Once again, the Guide provides a cursory view from which you can pick-and-choose which methods may work best for you.

## **COSTS:**

Costs for an SWI placement ... The figures below are estimates based on a three-month assignment and include round-trip airfare, accommodation and living expenses, vaccines as well as health and travel insurance.


### **Placement Services:**

Each total also includes \$??? in placement services provided by SWI (payable as a non-refundable deposit) as follows:

- Your assignment with one of SWI's secure, known, capable local partner organizations and the University of Zambia.
- Pre-departure information and orientation session.
- In-country orientation.
- Debriefing at the end of your placement
- Opportunities to write case studies based on your experiences in the field.

SWI is committed to supporting you throughout your placement. That includes helping you find support to reduce the cost. To get started:

- The University of Ottawa offers many awards or bursaries for students who want to study overseas through programs like SWI. Check your Info-web account for more details!
- Contact the International Office on campus to see how they might support you.

### ***Reducing costs!***

Remember, there are many factors that can affect the cost of an SWI placement, and some of them are under your control. For example, you can save by:

Need more cost-saving ideas or have some to share? Get in touch with us!

# **FUNDRAISING – WHAT IS IT AND WHY IS IT IMPORTANT:**

At the core of fundraising, is the need to build understanding, discover a common ground between fundraisers and donors and ensure a win-win outcome for those involved. As such, it is important to find a good fit between your needs as an SWI participant and those of the donors you approach.

Through fundraising, you provide potential donors with the ability to join in your journey with SWI. Donors are empowered through their ability to spend their money on something with purpose and meaning. By helping you achieve your goals, donors partake in your mission to create a tangible difference in the lives of Zambian people living in disadvantaged communities. But that's not all, by helping you achieve your goal, donors contribute to the enhancement of your university career and creating a more globally conscious, action-oriented and empowered youth.

The challenge of fundraising then, is to connect with potential donors on a personal level. If donors can connect with your goals on a personal level, they will be more likely to stand behind you – either financially, gifts-in-kind or through the provision of time and effort – and help you to achieve your fundraising targets.

## **TYPES OF GIVING:**

There are many types of giving. However for the sake of brevity, we will focus on those that apply associated with raising the funds needed to participate in the SWI placement. The Guide focuses on 3 kinds of giving: cash contributions, gifts in kind, and volunteering of time and effort.

### **Cash Contributions:**

Cash contributions may be paid by cheque, money order or cash itself. This is the most common kind of contribution. All forms of cash contributions are considered to have been made on the date they were mailed, hand-delivered or handed to the fundraiser.

### **Gifts-in Kind:**

Non-cash gifts can include tangible property such as gift certificates, stationary supplies, books, equipment, merchandise, etc... You are entitled to keep and use the property or sell it for the proceeds however any action you take with these gifts should be used directly towards your fundraising targets. The donor and the fundraiser should agree on how non-cash gifts will be used.

### **Volunteering of Time and Effort:**

Not everyone has the ability to donate money or gifts. Nevertheless, they may wish to help you achieve your fundraising targets in other ways. Perhaps they know someone who may be able to provide funds and are willing to introduce you to them. Likewise, they may wish to volunteer their time and effort in helping you. Everyone has something of value. This value may be in their ability to network and connect you to prosperous donors, talents they may have such as singing or playing an instrument, knowledge and experience organizing events, or time and effort they can contribute to your fundraising needs. All of these things are as valuable as cash contributions in achieving your target.

# **FUNDRAISING SKILLS:**

## **The Importance of Communication Skills in Fundraising:**

As a fundraiser, you will need to interact with a wide range of people including fellow participants, coordinators, potential donors and volunteers. To fundraise effectively, good communication skills are of the utmost importance.

Communication is not just about talking to people; it's about much much more. Communication skills include not only reading and writing but also listening skills, body language, paying attention, reflection and interpretation. All of these skills will help you reach your fundraising targets as well as whatever task you take on in your future career.

## **Listening Skills:**

Developing good listening skills is the first step to effective communication. Most people are so focused on getting their views across that they fail to listen properly. We may be inattentive, interrupt speakers, or misinterpret what people are trying to say without even realizing it. This can lead to misunderstandings as well as the possibility of leaving a negative impression on others.

Some common barriers to effective listening include:

- personal prejudices
- cultural and language differences
- too many people trying to talk at once
- excessive noise
- short attention spans and boredom
- preoccupation with other tasks
- emotions such as stress, fear, anger or disappointment

Effective listening doesn't always come naturally and can sometimes be a challenge. When you are excited or stressed, it is important to remember that staying calm, paying attention and listening effectively are the keys to successfully understanding others while successfully communicating your views and expressing your needs as a fundraiser.

As such, effective listening requires active engagement. This is not just to understand what the speaker is trying to say, but also to provide meaningful feedback through non-verbal cues such as nodding or smiling as well as short verbal responses that do not unobtrusive and don't dominate the conversation. To do this, it is important to have understood correctly what the speaker was trying to say. By asking questions, repeating important points back to the speaker and encouraging the speaker to elaborate on vague statements, you will better understand and connect with people.

Learning to listen effectively is key tool to have. It can help you to understand others, strengthen relationships, reduce errors, save time and resolve conflicts.

Tips for effective listening – provided by Algonquin College's National Fundraising Education Programme - include:

***Staying calm and relaxed*** – This prepares you for listening mode.

***Tuning out distractions*** - Don't try to listen as you do something else like answering phone calls.

***Clearing your mind of any preconceptions*** – This will help to ensure a more accurate interpretations.

***Keeping eye contact*** – this helps you to spot and return non-verbal communications and also tells your speaker that you are listening.

***Waiting for pauses rather than interrupting*** – You can use these to ask questions if needed or to make brief verbal responses.

***Giving regular feedback*** - You can do this with non-verbal communications in between pauses.

***Being empathetic*** - Try to understand how the speaker is feeling and avoid imposing your own feelings or suggestions.

***Remember key words and issues*** – This will help you with long conversations.

***Keeping your own verbal communications to a minimum*** - the general rule is to listen much more than you speak, especially when dealing with “difficult” people.

### **Writing Skills:**

Writing is another form of communication. As a fundraiser, you may need to use your writing skills for letters, emails, presentations or grant or funding applications. The skills associated with good writing require many of the same elements as other forms of communication. The most important factors to be aware of include: clarity, the importance of research, knowing your goals and transmitting your message effectively.

Depending on the purpose and intended audience, writing styles may differ. For example, if you are writing a grant application, it is important to use formal language that is succinct and to-the-point. Oftentimes, applications have a page or word limit but even if they don't, it's important to be concise. Take the time to explain your needs as clearly and briefly as possible. If possible, type applications rather than hand-writing and always be sure that your grammar, syntax and spelling are correct. Spell-checker is not enough. Your computer will only pick up on certain errors while not recognizing the use of inaccurate words or grammatical errors such as “it's” versus “its” or “tow” versus “two.” By editing your work, applications are more likely to be regarded as professional and taken seriously

To help achieve your goals and save time, know your audience. When an application is directed towards a particular organization, make the effort to find

out kinds of projects the organization you are applying to usually grants money too? Does your project meet the requirements listed in the donor's mandates? By taking the time to learn these things, you can focus on donors more apt to support you in your fundraising goals.

For more help on writing proposals, please refer to the following web site:

<http://www.learnerassociates.net/proposal/>

### **Public Speaking and Presentation Skills:**

As you have learned, good communication is not always an easy task. This is especially true when one is expected to present to an important figure or group of people. While you are fundraising, you may need to communicate with company executives, the dean of your university programme, or even large audiences.

As such, practicing and developing your presentation skills is important. Many of the skills previously mentioned – such as doing your research, knowing your goals, being concise, clear and knowing your audience – will help you in this task. However, it is also important to convey your ideas persuasively and confidently. How will you show your audience the value of contributing to your goals? While it may be taken for granted that some audiences – such as development organizations, past SWI participants or potential donors linked to your organization – will be sympathetic to your mission, others may not. This is why it is important – not only to communicate clearly – but also to be persuasive. Who are you and who do you represent? Why should the intended audience contribute to your fundraising goals? What benefit will it have to them?

To help achieve your goal, you may wish to use visual aids such as slides, pictures, supporting statistics and maps. Whatever can help your audience relate to your placement can – and should – be used. Where is Lusaka? What

does it look like? What is it like to live there? Why is it important for you to go there? What kind of change can you make to the people of Lusaka?

If you are unused to making presentations, you will find that practice is the best way to develop this skill. You probably have had to do presentations in classes, if not, keep the following points in mind:

- When using slides (Power Point), keep the points as brief as possible
- Use statistics, graphs or charts to stimulate the audience
- Make sure that your slides relate directly to what you are saying
- Watch out for “information overload” – don’t overwhelm the audience with too much information all at once

# FUNDRAISING STRATEGY:

## **Establishing Goals:**

The first step is to establish your goal. In doing so, you should ask yourself the following questions:

- What are you trying to achieve?
- What is the purpose of your mission?
- Why is it important for you?
- How much money do you need to achieve your goal?
- Do you have the time needed to actualize your fundraising goals?

## **Making a Case:**

Now that you have determined your own motivations, needs and goals it is important to create a case for support. Think back to the basic W5: who, what, where, when and why. Once you have written out your case, it is time to think about “how?”

## **Planning:**

Creating a successful fundraising strategy requires planning. Good planning is an essential tool in creating an effective strategy to achieve your financial targets. It involves time, research, creativity and most importantly realistic goals.

How will you achieve your fundraising targets? Will you canvas door-to-door, hold fundraising events, solicit companies, seek university or government grants? Will you approach local service clubs or religious organizations? All of these are great ways to help achieve your fundraising targets. But – to maximize expected returns – it is crucial that you use good planning and organization skills. Know your time limit, what kind of budget you are working with, who you can rely on for support and what kind of demands each option requires of you.

**Budgeting:**

Almost everyone has heard the saying: *“It takes money to make money.”* While this is most definitely true, even those with a small budget can create a successful fundraising strategy. Fundraising can be expensive. You may need to create flyers, posters, spend money on gas, postage, make long distance phone calls, use printed material or buy thank-you cards. Therefore, it is important to take stock of what resources you do have and how you can apply those resources in the most cost-efficient way. Be creative in finding resources. You can use country reports, SWI materials, fact or question-and-answer sheets or even reference letters from professors.

**Scheduling:**

Make a schedule. As a student, you will have many demands placed upon you while you are trying to fundraise. This could include a part-time job, homework, workshops, final exams and lectures. To ensure that you are able to carry out your fundraising goals, make sure that you don't take on too many activities at once. Make sure to allow enough time to prepare and put into action your fundraising strategy and arrange your schedule in order to maximize your time and avoid unnecessary delays or activities. This could mean calling prospective donors before approaching them, doing research so that you focus your efforts on prospective donors showing the most potential as opposed to 'long-shots' and having a realistic plan of action.

**Compile a prospect list:**

Most of you have heard of brain-storming. You can apply this concept to your prospective donor list. As with brain-storming, in name-storming, there is one cardinal rule – everything goes! Be optimistic and don't disqualify anyone. Don't limit yourself to people you think can give while discarding those who can't. As

we saw before, everyone has something of value that they can contribute to your efforts. You just need to give them the chance! Your list should be large enough to account for a certain number of rejections as well as responses that may be less than what you expected. You may think that you can never generate more than a hand-full of names. But, once you get started, you will realize that your network of family, friends, colleagues, fellow-students, professors, doctors, dentists, coaches and acquaintances is more extensive than you would have imagined. As you think about the people in your life, there will be more than enough sources of people to contact.

The following list will help you establish a list of potential donors. Spent some time thinking over the list and making a list of your own.

<ul style="list-style-type: none"> <li>• Aunts and Uncles</li> <li>• Foundations that give to charities</li> <li>• Apartment manager</li> <li>• Banker</li> <li>• friends</li> <li>• Beautician</li> <li>• Friends of your parents</li> <li>• School friends</li> <li>• Brothers and Sisters</li> <li>• Neighbours</li> <li>• Church directory</li> <li>• Neighbours at former residences</li> <li>• Church friends</li> <li>• Parents</li> <li>• Civic clubs</li> <li>• Parent's associates</li> <li>• Coaches from your youth</li> </ul>	<ul style="list-style-type: none"> <li>• Dentist</li> <li>• Dentist's nurse</li> <li>• Relatives</li> <li>• Doctor</li> <li>• Restaurant manager and workers</li> <li>• Doctor's nurse</li> <li>• Retired people</li> <li>• Downtown businesses</li> <li>• Eye doctor</li> <li>• Family attorney</li> <li>• Team-mates</li> <li>• Former co-workers</li> <li>• Veterinarian</li> <li>• Former college professors</li> <li>• Pastor(s)</li> <li>• Cousins</li> <li>• Parent's employers</li> </ul>
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Once you have established your own list, try to categorize it by some measure of likelihood to give. For example: Who are the sure-bets and who are the long shots? You can even rate the list: "T" for top priority, "M" for medium, or "L" for low priority. Once you have done this, you will be able to focus your efforts on where you will have the most success.

## **Making Contact:**

Once the preliminary prospect list has been compiled, the next step is to create a file in which you can add important information such as contact information, relationship, affiliations (persons who know the prospects), contact dates and status (i.e. rejection, donated \$10, etc...)

After you have identified and categorized your web of contacts in a file, it is time to think about how you will approach prospective donors.

Most donors will either be close to you or have some logical reason for donating. That is why research is so important. This is the process by which legitimate prospects are identified: who will give, how much, why? You never get a second chance at a first impression therefore – before you approach a potential donor – preparation is critical.

Your involvement and your organization's vision and mission must be clearly established in your mind. Your objectives must be specific, measurable and realistically achievable within a specific time frame. This will make it easier to communicate your needs and help prospective donors understand how their donation will contribute to your goals. You must be prepared to educate your donors on the need for your placement and how they can help.

Understanding your donor is critical. As a fundraiser, you must be aware that potential donors have probably already been solicited by a number of organizations, service clubs, individuals and other groups seeking funding. This is why it is important to clearly understand your mission, your needs, the impact of gifts and how they link to the donor. Finding the right fit is crucial as competition for charitable dollars is ever-increasing.

To help establish this link, ask yourself the following questions before approaching a potential donor:

- Do my values and those of SWI match those of the donor?
- Will the donor feel that their gift has made an impact?
- Do I inspire confidence?
- How can interest be created in my placement?
- How will my participation in SWI help create a better world to live in?

You may choose different ways to first approach potential donors, such as greeting cards, emails, telephone calls or door-to-door canvassing. However the same degree of preparation will be needed for each method.

### **The Ask:**

Asking for donations is the hardest part of fundraising. Some people may feel as though they are begging for money, they may feel they are inconveniencing people or embarrassing them by putting potential donors 'on-the-spot.' In order to inspire the confidence of potential donors, it is imperative that you push these insecurities out of your mind. Remind yourself why you are partaking on this journey, what you hope to achieve and why it is so important.

### **Timing:**

Timing must be well thought-out. The prospective donor must have the time to listen to you, understand your needs, connect to your goals and make a decision. Therefore, your approach should be made at a time that is convenient for the prospective donor. This is especially true of personal visits or telephone calls. The time of year can also play a factor. During the Christmas holidays, for example, many people are busy preparing for the festivities. They may not have as much time or money available as they normally would. Always bear this in mind when approaching a donor.

## **Securing the Donation:**

At the end of the day, securing the gift is what your fundraising efforts are all about. Not every “ask” or solicitation will lead to a donation. Regardless, after all the steps have been taken, the donation still must be requested. When asking for money, be polite and respectful, but also be firm. Never apologize for seeking a donation and maintain your confidence at all times. You will only inspire confidence in others, if you have confidence in yourself!

## **TYPES OF SOLICITATION:**

You may decide on one or several types of solicitation. Different methods include personal solicitation or door-to-door canvassing, direct mail, telemarketing and special events. The method that you decide upon will depend on certain factors. Not every method is appropriate for all fundraising purposes. Do the ground work before you commit to any one method. Know what resources are required, the time commitment needed and what you are most comfortable doing.

### **Personal Solicitation:**

Personal solicitation involves face-to-face contact. You may want to call the potential donor in advance to ensure that your meeting time is uninterrupted and at a convenient time. Being accessible and flexible in your availability is key. Because you are requesting their help, you should go out of your way to accommodate the potential donor.

As with any form of solicitation, be sure to have a game plan prepared in advance. Be ready to educate your reader on SWI mandates and your own personal motivations for participating in the placement. Know as much about the community in which you will work as possible and be prepared to answer difficult questions.

In face-to-face contact, you must also prepare yourself for the possibility of outright rejection. If this happens, remain calm and composed. Not everyone will have the ability to help you. Donors face an onslaught of fundraising demands as more and more services are transferred from the government to civil society organizations at the community level. As such, donors have become increasingly discriminating. This is commonly known as “donor fatigue.”

Before you depart for your meeting, you may want to practice your routine. Ask friends to sit down with you and go over your speech. Be compelling and involve your audience by gaining their interest. What will the potential donor gain from helping you? Why is your cause worthwhile? Role playing is an excellent way to prepare for a face-to-face meeting.

If the meeting is successful, end it with a promise to follow-up the next week. But even if there is no donation promise, always remember to thank the potential donor for their time. You may even want to ask them if they have any suggestions to help you meet your fundraising targets. They may have a good idea for a fundraising event, know organizations or individuals who may wish to support your cause, or they may be willing to donate time and effort to helping you achieve your goals.

### **Door-to-Door Canvassing:**

Door-to-door canvassing can be a very profitable way to raise money. A lot of income can be generated in the form of numerous small donations. By meeting with people face-to-face, the canvasser/ fundraiser can establish a personal relationship with potential donors even if they have never met before. The costs of door-to-door canvassing are minimal and usually just require a few promotional materials such as brochures or flyers and travel costs. However, canvassing is hard and exhausting work. The same preparation is needed for door-to-door canvassing as for personal solicitation. However, expect to put in a lot more effort educating prospective donors on your mission and the mandates of SWI for very little results. Also, expect frequent rejection. Because you will be approaching random strangers, it may be a good idea to bring a fellow SWI participant or friend with you while you canvassing. This can help keep you motivated when things get tough and ensure your personal safety.

## **Direct Mail:**

Using the direct mail method allows you to reach a large audience quickly. Donors can open, read and reflect upon your request at their leisure. It is relatively easy to type up and print a personal letter stating your goals and needs. While you will need to change the recipient name and address, but the bulk of your letter will remain the same. A simple fill-in-the blank format can save you time and effort. A sample letter can be found in the appendix.

If you decide to create your own letters, it may be a good idea to state your relationship with the reader. How do you know the reader, when did you last see them, what are their hobbies or interests? By mentioning something personal that you share with the reader, you develop a relationship with them through which you can pull them into supporting you. Don't forget to educate your reader. Explain to them why you chose to participate with SWI and how this opportunity is important to your future. Explain why you need their help and how they can participate in your success. Be specific! Enable your reader by specifying exactly what you want them to do and include a commitment to follow up by telephone the next week. It is important to provide the reader with enough time to get the letter, read it and digest the contents before making a decision. But don't wait too long before following-up. One week is an acceptable time to give. And finally, don't forget to sign each letter personally.

If possible, enclose a self addressed, stamped return envelope along with a response device such as the sample donation return form (appendix). The easier you make it for the reader, the better.

While direct mail can be an extremely effective fundraising technique, there are limitations. For example, funds raised through direct mail-outs may not cover the cost of the initial mailings. Furthermore, meticulous record keeping is crucial in

keeping track of who was contacted, when the initial contact took place, and the individual follow-up times.

### **Telemarketing:**

Soliciting donations by telephone is a quick and efficient way to generate income. Telemarketing can be used in tandem with other fundraising methods such as direct mail-outs (Appendix) or door-to-door canvassing. Using the telephone allows the fundraiser to make direct contact with the potential donor and can reduce the stress of approaching acquaintances or strangers. Donors can provide immediate feedback, ask questions and obtain a call-back number for further information. Almost anyone can use this approach as it is fast, easy and cost effective. However, as with any fundraising method, telemarketing has its drawbacks.

You may inconvenience people by calling them when they are busy or trying to relax. Likewise, people may simply become annoyed at being solicited over the phone. Finally, you must be more direct in your communication while paying attention to verbal subtleties and background noise. If you determine that your call has come at an inconvenient time (crying children in the background, doorbells ringing, etc...) politely ask the prospect for a more convenient time to call back. Another limitation is the difficulty establishing trust. The prospect may never have heard of your organization, they have no personal connection to you and may be weary of being taken advantage of.

### **Special Events:**

Special events are a great way to get creative with your fundraising campaign. They can include benefit dinners, silent auctions, skate-a-thons (a great idea for the National Capital), parties, wine tastings and concerts. Special events can provide substantial returns and quickly enhance your image within the

community. Events can be fun, allow you to reach a broad audience at one time, broaden your donor base, and generate money from otherwise difficult-to-reach groups of people.

While at first glance events may seem like a great idea, it is important to keep in mind the special challenges you will face.

Event planning requires a tremendous amount of advance planning and energy. You may need to rely on volunteers to help you organize and coordinate your event. Events can be very expensive. They may require a significant amount of materials such as flyers, props, refreshments and prizes. You may also need to rent a hall or similar venue. This will require up-front funds and can be financially risky. Attendance and results can not be guaranteed.

To ensure success, careful planning and organization is needed. You must be both motivated and motivating about your mission and objectives. You will need to possess leadership skills, maintain an air of confidence and composure, and the versatility to solve problems on-the-spot. Don't forget to be optimistic and create a 'fun' environment for both volunteers and potential donors. Finally, a sense of humour goes a long way! Don't forget to laugh and to have fun. Special events are meant to be exciting and enjoyable, for both donor and fundraiser alike.

## **OTHER TYPES OF FUNDRAISING:**

Many other forms of raising money may be of interest to you as a fundraiser. These can include education awards, grant applications and fundraising proposals.

### **Grant Proposals:**

Grants are sums of money awarded to causes, organizations or individuals for specific agreed-upon purposes. Grants are available from governments, foundations and sometimes from corporations. They can be publicly advertised or privately available.

When applying for grants, it is important to do your research. Most granting agencies will only support initiatives that fall within their interest area and mandates. Furthermore, corporate grants – although profitable – may be outside your reach as an individual fundraiser partaking in an overseas initiative. As a general rule, corporations seek to enhance their profile within their local communities. As such, local initiatives - carried out within the community itself - may have more success winning corporate grants.

Grants can be an effective way to achieve large lump sum contributions to our fundraising requirements. There are rarely any up-front costs or fees associated with grants. As such, grants are a zero risk way to focus your efforts. They can be done with little to no outside help, and can help you establish credibility with other donors.

University organizations such as Alumni groups, the International Office, Dean's grants, and departmental grants are the most relevant types of grants for SWI participants.

Local service clubs such as the Lions Club, Kiwanis Club, Rotary Club, Girl Guides, Boy Scouts and student groups are also a good source of grant possibilities. Churches and religious organizations – such as your local ladies guild or Knights of Columbus – can also be very profitable.

Nevertheless, it is not recommended that you focus all of your fundraising effort on grant proposals. Grants are extremely competitive, may not suit your time restraints, and may not be available for your proposed initiative. Grants may be directed at specific geographic locations as well as be limited to specific social, economic and political mandates of the granting agencies. On the part of the fundraiser, grants require a considerable amount of research, time and effort. Response time may be lengthy if any response is provided at all.

Many grants require you to provide updates on your progress and make presentations upon your return. It is important that you bear these considerations in mind when accepting grants. Will you be able to fulfill the requirements asked of you within a reasonable amount of time after you return? Are you comfortable with public speaking and making presentations? If you can fulfill these requirements, they are a great way to connect with other like-minded individuals within your community and share the knowledge you gained through your SWI placement.

## **THANKING THE DONOR:**

Whether you received a donation or not, it is important to thank the potential donor for their time. Perhaps they couldn't afford to help you or maybe they have devoted their available money to another organization. Whatever the reason, you must be respectful of their decision. This is important in the maintenance of relationships. You never know, they may have a change of heart in which case, it's important not to burn any bridges. You may need their help again in the future at which time they may be willing to help you. If you are soliciting face-to-face, you should thank the donor immediately. For large donations, it would also be a good idea to send them a thank you card. Everyone likes to know that they are appreciated and a thank you card is a simple way to show your gratitude.

When sending thank you cards, be sure to keep a record so that you don't forget to send one or send a card to the same person twice! If possible, hand-written letters are best. Be personal. The donor has helped you achieve your goals. Let them know how much you appreciate them. They deserve it!

## **WHEN THINGS GO WRONG:**

Fundraising is hard work. It requires a great deal of determination, optimism and belief in what you are trying to do. Even the best fundraising strategy may come across unexpected events and disappointing results. Don't be afraid to make mistakes. A good fundraiser is responsible. We all make mistakes. But the important part is how you deal with them. When mistakes happen, be honest with SWI and the donors involved. Have respect for yourself and for those around you. Being a good fundraiser involves accepting responsibility for your actions. Furthermore, use mistakes as an opportunity to learn. Flexibility, creativity and resourcefulness can make a bad situation good. Even when you do everything right, things may not always go as planned. Major donors may pull out or fail to deliver the promised results. Stay determined, keep your focus and use the resources you have. In being versatile and thinking outside-the-box, you will be able to meet almost any challenge you are faced with.

## **WHAT HAPPENS NEXT?:**

The relationship you have with your donor doesn't just end at the moment you receive the funds. In fact, oftentimes, that's where the relationship really begins. Whether it be through a simple thank you - expressed verbally, over the phone or by letter – or the agreement to update donors on your progress or perhaps even a promise to give a presentation on your time abroad once you return. Whatever the case, it is essential to tie up loose ends.

This is important – not only to show your gratitude to the donor – but also to develop strong relationships with them that may benefit you in future.

If you have agreed to maintain regular updates, you may consider starting an online blog. Blogs allow the participant to have a virtual journal that is widely accessible to interested donors and future participants. By starting a blog, you enable donors to obtain updates on your progress at their convenience. Online journals can also make donors feel as though – by helping you achieve your goals and living vicariously through your stories – they have become a part of your journey. That their money was well spent, and that they have invested their money well.

## **A FINAL NOTE:**

As a SWI participant, it is important to understand the different roles you will be expected to play. You will have many hats to wear during your time with SWI. You will be at once student, fundraiser, teacher, traveller, development practitioner as well as SWI ambassador both at home and abroad. You will need to build strong relationships both within and outside of the organization and enlist their support in achieving your numerous objectives.

This is especially crucial when dealing with potential donors. Promoting community awareness of SWI's vision, mandates and initiatives will be central to your tasks. As such, you may be required to participate in networking and community relations activities on behalf of the organization.

Honesty and integrity are of utmost concern. During your fundraising initiatives, you may be faced with difficult decisions that could compromise both your own reputation and that of the organization. Know when to draw the line and have the strength to do the right thing. Always show respect for yourself, potential donors, partners, colleagues and SWI.

# RESOURCES:

## Useful websites:

- Charity Village:
  - [www.charityvillage.ca](http://www.charityvillage.ca)
- Imagine Canada:
  - [www.ccp.ca](http://www.ccp.ca),
  - [www.nonprofitscan.ca](http://www.nonprofitscan.ca),
  - [www.imagine.ca](http://www.imagine.ca),
  - [www.givingandvolunteering.ca](http://www.givingandvolunteering.ca)
- Association of Fund-Raising Distributors and Suppliers:
  - <http://www.afrds.org/>
- Philanthropy News Network::
  - <http://www.pnnonline.org/search.php?query=&topic=3>

## Books:

- [The Guide to Raising Money from Private Sources](#), Thomas E. Broce
- [Strategic Fund Development: Building profitable relationships that last](#), Simone P. Joyaux

**APPENDIX:**

**Sample Letter for SWI Placement Fundraising.....**

**Sample Thank you Letter.....**

**Sample Donation Return Form.....**

**Donation Control Sheet.....**

**Sample Phone Call.....**

**Generic Grant Proposal Form.....**

## **SAMPLE LETTER FOR SWI PLACEMENT FUNDRAISING:**

Address Line  
Address Line  
Address Line

date

Dear Mr. Smith,

For sometime I have been considering doing something really constructive about the needs of the people in other parts of the world.

I have been given an opportunity to travel to Africa - together with a number of other University of Ottawa students - to work with an organization that provides direct support to disadvantaged communities. Our team will be travelling to Zambia and working in the capital city of Lusaka during the 2008 summer months.

My request is simple: I invite you to join me in supporting this project financially. I need fundraise \$0,000 towards this effort. You will receive a charitable tax receipt for your contribution. (SWI Canada is not yet registered with CRA) Please make your cheques in favour of SWI with my name listed in the memo section.

A number of people have told me that they are distressed by what is happening in Africa, but are not in a position to travel there to help at this time. This project gives you the opportunity to make a difference in the lives of the people I will be working with.

I thank you in advance for your donation. Should you require any additional information please contact me at (613) 000-0000. I will follow up with you within a week.

Many thanks,

*(Your Signature)*

Shared World Initiative (SWI)- University of Ottawa student participant

*P.S. I look forward to talking with you soon.*

Gifts to support SWI placements are tax-deductible. Cheques must be made out to Shared World Initiative. In the unlikely event that the specified participant is unlikely to make the trip, SWI will use the collected funds to help other students meet their fundraising targets.

## **SAMPLE THANK YOU LETTER:**

date

Dear Mr. Smith,

Thank you for your donation. Your contribution will make possible my participation in the SWI project in Zambia. Thanks to your help, I will be able to share my time, effort, knowledge and skills to people living in the disadvantaged communities of Lusaka. You will also help me obtain the capacity and skills needed to begin my career after my university studies are over.

The Shared World Initiative is a student-led organization focusing on multidisciplinary teamwork, global partnership and sustainable development. SWI provides a means whereby University of Ottawa students can gain credible, academically recognized real-world experience in the field of international development thus reinforcing our relationship and responsibility to the global community.

Should you require any additional information about our work and projects please visit <http://www.uottawa.ca/international/exchanges/sharedworld/index.html> for more detail.

A tax receipt for your contribution to this project will be issued by Shared World Initiative. (SWI Canada is not yet registered with as a charity organization)

Many thanks,

*(Your Signature)*

Shared World Initiative – University of Ottawa student placement member

## SAMPLE DONATION RETURN FORM:

### Shared World Initiative

Mr. John Smith  
123 Anywhere Pl.  
Anyplace, ON.  
K0C 2J0

Tax receipts are issued for gifts over \$10

Charitable Reg. Number:  
\_Not yet Registered\_

Yes, I want help a University of Ottawa student make a contribution to the people of Zambia. I want to make a difference in the life of a student and help people from disadvantaged communities in Lusaka to obtain the capacity and develop skills needed to create a sustainable future.

Enclosed is my donation of \$50.00 \$100  \$200 other\$\_\_\_\_\_

I am making a donation by cheque, payable to SWI

Signature: \_\_\_\_\_ Tel No: \_\_\_\_\_  
e mail: \_\_\_\_\_



## **SAMPLE PHONE CALL:**

### **With advanced letter campaign:**

"Hello, Mr./ Ms. \_\_\_\_\_. This is \_\_\_\_\_ calling. How are you?" *Allow time for response.* "That's great. By the way, have I called at a convenient time?" *Allow time for response and small talk. Be polite but brief.*

"As I explained in my letter, I am planning to go on an overseas placement with Shared World Initiative during the summer of 2008." *Educate the respondent on the details of your placement, how it will contribute to your experience and education while helping people living in disadvantaged communities of Lusaka.*

"I mentioned that I am in the process of fundraising for my placement. I wrote asking you to consider helping me to achieve my financial targets through a donation. I was wondering if you have had time to consider my request." *Allow for the respondent to take a moment to think and to respond. Don't be concerned about a moment of silence, due to the letter that you sent, respondents will be expecting you to ask for money.* "That's great. Every little bit helps. Is there a convenient time that I can arrange to pick-up the donation? Or would you prefer to send your donation by mail?" *Allow for response and coordinate a pick-up time or expected cheque mail-out date..* "Thank you so much for taking the time out to talk to me today and agreeing to invest in my placement. I wouldn't be able to do this without generous people such as yourself."

"By the way Mr./Ms. \_\_\_\_\_. I could also use your help in another way. Would you know of anyone else who may be interested in supporting my cause? Are there any of your friends, business acquaintances or organizations that you think may be of interest to me?" *Allow for response.*

"Have a good day and thanks again for your support." .

## GENERIC GRANT PROPOSAL FORM:

<b>Funding Proposal – SWI Placement</b> <b>Your name</b>
---

**Date:**

**Re:** Funding for a student placement in Lusaka, Zambia  
 Shared World Initiative, University of Ottawa student-led initiative

**From:** (your name)

**Why/What?**

My name is \_\_\_\_\_ and I am a student at the University of Ottawa. I am in my \_\_\_\_\_ year, studying \_\_\_\_\_. Because of the nature of my programme I thought it would be an excellent idea to do an international placement where I could apply what I have learned directly in the field. That is why I have recently accepted a placement with the Shared World Initiative in Lusaka, Zambia.

**The organization – Canada**

Name	Shared World Initiative (SWI)
Programme	Student Placements
Description	You apply your academic knowledge and theoretical concepts to a practical work environment in the developing world during an academic term. Through this experience, not only are you making a life-altering change, but also a difference in the lives of many living in disadvantaged communities both here and abroad. International development placements allow you to grow and experience new cultures, apply the knowledge and skills you have acquired in school and make links to professional practice in your field. Students who work abroad come away with added abilities that are valued in the workplace.
Students Gain	<ul style="list-style-type: none"> <li>• an understanding of global issues and perspectives</li> <li>• an appreciation of diversity and increased cultural sensitivity</li> <li>• willingness to accept new challenges</li> <li>• improved interpersonal and communication skills</li> <li>• a new level of maturity and independence</li> <li>• confidence that all individuals can effect change</li> </ul>

**The situation:**

On paragraph describing what you will be working on specifically and how it will help the people of Lusaka.

**Personal Goals and Motivations:**

- Obtain practical experience to compliment my theoretical knowledge.
- Learn how projects develop and the challenges of development projects from an on-hand experience.
- Obtain university credit for my internship.
- Write a case study based on my experiences that will be published by SWI and provide a copy to all of the donors.
- Gain experience that will help me become accepted into a Master's level programme of academic study.
- Gain experience that will contribute towards my career.
- Help make a positive difference in the world.
- Help gain awareness in Canada regarding the unique problems experienced by disadvantaged communities in Lusaka, Zambia through presentations pre departure and upon return.

**The Challenge:**

Unfortunately, as a student, I am unable to meet the full costs of my placement. Therefore, I must fundraise to raise the funds necessary to accomplish my target. I would very much appreciate it if you could help me raise my funding goal of \$ so that I can help do my part to better the lives of people living in the disadvantaged communities of Lusaka. Of course any amount, no matter how small would be appreciated.

**What can I do for you?**

- Presentations upon return.
- Access to a travel blog which I will update regularly.
- Digital photos available should you wish to use them for promotional material.
- Direct local experience for you to draw on should you wish to know more about the situation in Lusaka.
- Willing to provide other services upon request.

**Budget:**

<b>Placement</b>	<b>Up to 4 months</b>
Flight	CAD
Travel and health insurance	CAD
Vaccines (Hepatitis A/B, Typhoid, Meningitis)	CAD
Living costs including accommodation	CAD
Emergency funds	CAD
Placement service	CAD
<b>TOTAL ESTIMATED COST</b>	<b>CAD</b>

I have put in applications for grants with the following places:

<b>Name</b>	<b>Amount</b>
U of O Alumni	200 CAD not confirmed
Personal Donations	100 CAD confirmed
Rotary Club	200 CAD confirmed
U of O Mobility Scholarship	1000 CAD confirmed
Dean – Social Sciences	100 CAD confirmed
SFUO	500 CAD not confirmed
OPIRG	Waiting on reply regarding possible funding.
CWUF	Waiting on reply regarding possible funding.
Personal Donations	Will be seeking donation until departure date.
Corporate Sponsorship	Will be seeking funding until departure date.
Ottawa AIDS Committee	No funding - box of condoms for distribution available.

I plan to host the following fundraising events:

<b>Fundraising Event</b>	<b>Expected Results</b>
Wine and Cheese (date proposed)	Tickets sold in advance. Hoping to raise \$400.
High School Dance (date proposed)	Hoping to raise \$400.
Night Club Party (date proposed)	Hoping to raise \$1,000

**Requirements:**

- \$ or whatever funding can be granted
- Information on Lusaka, Zambia, if available
- A listing of other aid organizations and contacts in Lusaka, if available
- Information on how I can make the most out of the experience pre departure, during, and after I return
- Information on where else I may be able to solicit regarding funding opportunities.

**Deadline:**

As soon as possible

**Contact Information:**

Address	Jane Smith My Street Anyplace, ON K0C 2J0, Canada
Telephone	613.123.4567
Email	<u><a href="mailto:Myname@uottawa.ca">Myname@uottawa.ca</a></u>

