TOOLKIT FOR:
Grants, Fundraising & Sponsorship

Prepared by:
Alumni Relations & Annual Giving
Office of Advancement
Queen’s University
613.533.2060

Advancement Office
Alma Mater Society
John Deutsch University Centre, Queen’s University
613.533.2725

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Introduction

The purpose of this toolkit is to provide information and guidance for Queen’s University clubs, committees, or conferences seeking funding support.

The Office of Advancement works to help educate student leaders on best practices in philanthropy, including compliance with the regulations of the Canada Revenue Agency, which oversees all Canadian charitable organizations, including Queen’s.

Whether you’re looking to apply for grants, or approach businesses for corporate sponsorships, or even properly steward supporters, this toolkit will provide you with the information to help you on your way to having a successful year!

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Grants
Seeking additional funding each year can prove challenging, yet may be pivotal to enhancing and delivering your projects or programming goals. To secure funding, it is essential to create a proposal that follows the funding guidelines and application, and to limit your applications to funders that fit the needs of your organization. With assistance from Queen’s Office of Advancement, the AMS Director of Advancement can help you build or improve your proposal.

Grant Writing Guidelines

Define the need for the project/initiative. Be specific in explaining your organization’s mandate, the purpose of your project, and the value it brings to the Queen’s community.

Describe the potential impact. Share how the project aligns with the funder’s priorities, how the funding will enhance your organization’s goals, and how your project can be sustained.

Include a clear, balanced budget. Be realistic in illustrating what you require from the funding agency to deliver your project, and ensure the requested funding covers eligible expenses as outlined by the funding agency (i.e. Some funders may specify fund allocation towards staffing, administrative, capital cost, etc.).

Identify clear measures of success. Propose an evaluation that explains what success will look like and how you will achieve it.

Where do I find information on Grant Opportunities?
As you consider where to apply for funds:

Access the AMS Event Funding Guide, a resource that provides information on various grants available for student organizations. Seek out information online – i.e. Queen’s website, AMS Clubs portal, government websites, or use search engines for foundation and corporate funders to learn as much as possible. Talk to other Queen’s clubs, committees, or conferences about their funding sources.

Important To Know

Funding Period: If successful, funds will be made available for use during a specific time period. Ensure that the funding period described by the funder aligns with your purpose project timeline.

Note: If the funding is not from Queen’s, the funding period may not align with the academic calendar.

Application deadlines: Give yourself enough time to complete a funding application package, and check for upcoming deadlines – commonly in October and January. Otherwise, this can be a missed opportunity!

Check your eligibility! Do not waste your time – or a funder’s – completing a proposal if your organization and project do not meet the funding guidelines and criteria.
Fundraising

Queen’s and its affiliates must adhere to consistent monitoring, supervision, and record-keeping practices to undertake fundraising initiatives. Your first step in pursuing fundraising is to consider the purpose for which you are raising funds, and how that purpose aligns with the mission and mandate of Queen’s University. Your second step is to connect with the AMS Advancement Office to explore what fundraising path is the right one for you.

Asking for Support
Your solicitation or crowdfunding campaign will be most successful by reaching out to your personal network and immediate club social circle. This may include: club alumni, family members, friends/neighbors, or fellow students.

You can ask for support in a variety of ways: letters, emails, social media initiatives, formal campaign strategies, event-based solicitation, etc.. Whichever method you choose, a request for support should be personable, purposeful, and sincere. You should be proud of your participants and projects, and they should be proud to be one of your donors. Use impact statements and tell a narrative to engage with your audience. Visit the Queen’s website to see how the university connects to the Queen’s community and learn about the many people who support Queen’s through the Initiative Campaign.

Online Crowdfunding
Depending on your unique fundraising program – developed with the support of the AMS Director of Advancement – you may wish to explore crowdfunding platforms such as:

- Tilt
- Chuffed.org
- Indiegogo
- GoFundMe

Important to Know

Philanthropy: The concept of voluntary giving by an individual or group to promote the common good.

Fundraising Program: An organization’s strategy, tactics, objectives, case, and needs in their entirety; a campaign that is loosely defined in terms of timeframe and specific funding opportunities; a timetable for a campaign.

Gift: A voluntary, irrevocable transfer of something of value without consideration at the time of transfer or any time in the future. If the individual making the gift entertains any ideas of reclaiming it, the transfer is not a gift.

Online Giving: The option to donate via the Internet, namely a giving page established by the group raising funds.

Connect with the AMS Advancement Office to explore what fundraising path is the right one for you!
Fundraisers That Work

Fundraising events can be a fun, exciting way to introduce new potential supporters to your mission, reinforce current relationships, and raise additional funds to support your operating expenses. This funding can sometimes be philanthropic dollars or sponsorship dollars, but often it falls into its own category: broadly speaking, event revenue. As a result, individuals or companies who support your cause through said event are not eligible for a tax receipt because a benefit has been provided.

Developing Fundraising Events

**Volunteer Support.** Ensure you have the necessary volunteer support to successfully operate your event and raise the funds you set out to achieve.

**Know your Budget.** How much money do you need to operate programs each year? Set your event revenue goals at dollar amounts that are attainable and necessary to sustain your operations.

**Promote a tangible that the money is going towards.** For example, if it’s funding charity directly: ‘buying 4 tickets for the auction gives 5 kids an opportunity to attend dance classes’. Or, if it’s helping with internal operations: ‘selling 50 raffle tickets will allow our organization to expand our afterschool program to run an extra evening each week’.

**Choose Fundraisers that work for you.** There are many different types of events (e.g. big, small, ongoing, 1-time, annual, etc.) and it is important to choose fundraisers that will bring you success.

**Make sure you’re following event protocol!** Review the AMS Events Guide and direct questions to the AMS Advancement Office.

Plan for Success

It is challenging to organize successful fundraisers on-campus. Student organizations and groups hold multiple events each academic year targeted at the same audiences (Queen’s students, alumni, and community members), and it can become more and more difficult to engage these stakeholders. Be sure to set your own success metrics, in addition to following these extra tips for success:

- Establish a committee dedicated to the task of planning and executing your fundraiser.
- Always consider the return on investment (ROI) before committing to a fundraising event.
- Provide benefits for the individuals/companies to be involved.
- Pair your fundraiser with awareness-based activities to educate your audience about your mission and club mandate.
- Apply to put your event on the AMS Events calendar.

Important to Know

Various Fundraising Events that you may consider:

- Sales of Goods (e.g. cookies, fruits, clothing, books)
- BBQ or other meals (e.g. pancake breakfast, semi-formal dinner)
- Raffle or Auction
- Sports Tournament (e.g. Basketball, dodgeball, hockey)
- Partnerships with local companies (e.g. donate your tips campaign, BINGO, dinner at a restaurant)
- Fashion Show
- Community fun run / walk
- “_____” – a-thon (e.g. bowling, dance, swim, read)

Have an idea that you are unsure of? Talk to the AMS Director of Advancement. There may be issues that you are not aware of that would prevent the fundraising from taking place or that may require you to alter your plan (ie. insurance policy/procedures, lottery license, accessibility requirements, etc.).
Fundamentals of Sponsorship
To uphold Queen’s University’s distinguished reputation it is important that any Queen’s club, committee, or conference seeks out reputable, socially conscious, and philosophically aligned companies for sponsorship opportunities.

Queen’s established partnerships
There are multiple partners already established at Queen’s that student clubs need to be aware of. For example, Coke, CIBC, MBNA and TD Insurance Meloche Monnex (TDIMM) have long-standing arrangements to support various Queen’s initiatives. It is imperative that you connect with the AMS Director of Advancement prior to any outreach to these companies, or to any direct competitors. Queen’s and the AMS work together to maintain a Sponsor Relations Record of all partnerships and relationships made by student groups to better support your efforts.

Key guidelines to seeking sponsorship:
- **Tailor your sponsorship package.** Customize your package to fit a prospective sponsor’s values, your specific funding needs, and to make what you offer unique; negotiate expectations as necessary. **Know your assets and demographic.** Assess what you can do for your sponsors based on your resources and key audiences. Do not make promises you cannot deliver. **Leverage your personal networks.** Reach out to your contacts, and do not be afraid to ask them to make introductions. **Do your research.** Have a thorough understanding of your prospective sponsor’s area of interest, reputation, and history of social responsibility; know if an online application form exists to request sponsorship from a company; and know who to connect with to have the best opportunity for success. **Maintain and build a relationship.** A sponsorship package does not and should not speak for itself! Seeking sponsorship involves a strong pitch, consistent communication, and positive rapport with all invested stakeholders. **Have a sponsorship agreement.** Describe what has been negotiated to ensure a clear understanding of what is being offered. The AMS Advancement Office can provide a template and help you decide who should sign the agreement.

The Pitch (art of the ask)
Remember that you are offering a company an opportunity to invest in something that is worthy of their support. What’s in it for the corporate sponsor? Sponsorship is about what **YOU** can do for **THEM**, not what **THEY** can do for **YOU**.

Important to Know

**Philanthropic Dollars vs. Sponsorship Dollars:** Philanthropic dollars support a socially beneficial cause without financial or material reward to the corporation. Sponsorship dollars represent a mutual business proposition that offers value in exchange for money.

**Value Sponsorship:** A form of sponsorship where there are negotiated expectations for offered sponsorship by reviewing what you can offer as a benefit and what the potential sponsor deems ‘valuable’.

**Capital Sponsorship:** Sponsorship developed from the ground up, including co-development and creation of capital initiatives and projects. The sponsor may have a large say in project development or results.

**Co-Sponsors:** Sponsors of the same event or property.

**Sponsorship dollars** are NOT eligible for a charitable tax receipt.
**Sponsorship Package**

Customizing a sponsorship package is important. Queen’s – alongside many industry professionals – encourages a standard template or structure to ensure your package is concise, transparent, and sponsor-focused. To assess or build your package, utilize this [detailed sponsorship checklist](#), review a professional [student-developed package](#), and ensure your package includes the sections outlined below. The [AMS Director of Advancement](#) is available to help you review and refine your package.

**Cover Page**

Cover letter or email should be personalized with your contact’s name and the company.
Include a logo/visual, tagline, and name of the opportunity or program.

**Sponsorship Package Components**

**Case for support**

Share the impact of your work and success stories. Everyone wants to be part of a winning team.

**Marketing your sponsor** – why should their company get involved with your team? Check out the [Bank of Benefits](#) for some inspiration.

- Share your philosophy and how you like to work with your sponsors.
- Explain your assets, and acknowledge your ability to customize.
- Don’t forget about your intangible assets and the value of your brand as a student-led group, and as part of Queen’s University.

**Budget**

Illustrate your financial accountability by sharing revenue sources & needed funding. Show how you are fiscally responsible.

**Making the ask/levels of support**

Outline the opportunities where they can support your project or program. Including a multi-year pledge is optional.

**Contribution/Submission Form**

Make sure it is user friendly and contains clear Queen’s contact information.
Stewardship

Recognizing the generosity of supporters is extremely important. Something as simple as a written letter or phone call thanking donors for their support fosters amicable relations between groups and ensures that donors recognize the value of their gift to student clubs and organizations. Thanking sponsors (in addition to sending fulfillment reports) is also important to developing long-term partnerships. It has been proven time and time again that donors say they would definitely give again if they continue to be provided with important information about their gifts at work. Likewise, sponsors will continue to explore further funding opportunities if you thank them for their contributions and produce expected results.

Impact Matters

Tell your sponsors how their support made an impact.
- How did their sponsorship dollars support your initiative? Or was it a gift in kind that helped a specific need?
- How did their support improve the student experience?
- What can your club or group do now that they couldn’t do before? And why is that better?

Tell your donors how their gift made an impact.
- How were recent donations spent?
- How did their support improve the student experience?
- What can your club or group do now that they couldn’t do before? And why is that better?

Process for thanking your supporters
Charitable gifts that are processed through Queen’s Office of Advancement, Gift Services in support of student clubs or groups will be contacted by the AMS Director of Advancement to thank their donors. It is strongly encouraged that all clubs and groups seek financial or technical support for stewarding efforts by contacting the AMS Director of Advancement. Collaborative stewarding efforts will be subsidized by the AMS Advancement Office.

Crafting a Thank You Message

Work with the AMS Advancement Office to determine the best way to thank your supporters. Sponsors should receive a brief thank you note and a follow-up report, whereas donors only need be given a thank you message. At Queen’s multiple platforms are available for stewarding: letter, card, e-card, video, etc. Take time to review a sample thank you card (courtesy of QPID), learn about the Do’s and Don’ts of Thank Yous, and get inspired by the gratitude from the Initiative Campaign Close.

Important to Know

Stewardship: Ensuring that the funds provided by donor are utilized in the way intended as conveyed in gift agreements and terms.

Donor Stewardship:
Acknowledgement of a donor’s gift, and its positive impact on Queen’s. Good stewardship ensures accurate, timely, and meaningful expressions of gratitude. In most cases, the most heartfelt and impactful acknowledgements come from those who directly benefit from a donor’s generosity (e.g. students receiving bursaries).

Donors want to know their contributions are going towards a good cause and are being used responsibly.

Open and ongoing communications will help aid in assuring your supporters that their contributions are not only appreciated, but cared for in a fiscally responsible manner.
Transition & Succession Planning

A proper transition is important for the continued success of your Queen’s club, conference, or committee. You want to ensure that the work you have done throughout the year is not lost with a change of leadership. Stay connected with your immediate student-support networks (i.e. AMS Advancement Office, AMS Clubs Office, Faculty Society) for detailed information on the services, deadlines, and workshops offered throughout the year.

Tips for a Successful Transition:

- **Have a timeline.** Think about what you want to accomplish and when you need to accomplish it.
- **Have a transitional email address.** During a transition period, this email address is the primary method of contact for your club. If you use your personal address, there is a possibility that your successors will miss important deadlines and resources from your student support network.
- **Write a transition manual.** This should include important contacts and relations, post-event reflections, the dynamics of your club, regular operational tasks, and anything else you wished you had known at the start of this year.
- **Have a database for important files.** Keep track of your media materials, grant applications, stewarding efforts, finances, and helpful resources so your successor can save time and energy.
- **Have Volunteer Position Descriptions.** These are a great way to outline role responsibilities, ensure new leadership understands your club’s reliance on volunteers, and review the efficiency of your organizational structure.

Help Us, Help You!

In order to provide continued support, it is important the Office of Advancement receive the following each year:

- **Club Membership List.** These lists are coded into the Advancement Database to help you connect with your alumni for mentorship, reunions, and fundraising.

  **Sponsor Relations Record.** This information is tracked in the Advancement Database to help you build on past connections, maintain reputable relationships with all sponsors, and uphold Queen’s reputation for excellence.

The Office of Advancement works with your immediate student-support networks to ensure this data is collected. Please follow the process outlined by the AMS Advancement Office on the AMS Clubs Portal; or, click these links to access the 2016-17 Membership Submission Form and the 2016-17 Club Sponsor Relations Record Submission Form.

Important to Know

2016-2017 Deadlines:

- November ‘Alumni, Sponsor, & Donor Relations’ Presentation at Clubs
- Caucus (by AMS Advancement Office and Queen’s Office of Advancement)
- Mid-February Club Membership Lists
- End of March Sponsor Relations Record
- End of April AMS Club Ratification

Think Ahead! When hiring, recruiting, and engaging volunteers, consider who may be able and willing to assume a larger leadership role in future years. With proper planning and monitoring, volunteer succession planning will strengthen the ability of the organization to meet its objectives and withstand the challenges of retaining engaged volunteers.
Advancement Office - Alma Mater Society

Clifford Lerebours  
AMS Director of Advancement  
Ext. 79014 advancement@ams.queensu.ca

Alumni Relations & Annual Giving Partners

Emily Mackwood  
Program Manager, Special Interest Groups  
Alumni Relations & Annual Giving  
Ext. 78959 emily.mackwood@queensu.ca

Sarah Indewey  
Manager, Volunteer Relations and Reunions  
Alumni Relations & Annual Giving  
Ext. 78825 s.indewey@queensu.ca

Ben Seewald  
Alumni Officer, Students Alumni Relations & Annual Giving  
Ext. 78701 ben.seewald@queensu.ca

Queen’s Office of Advancement, alongside your immediate student support networks (i.e. AMS), is always trying to improve the support and resources offered to you. Please do not hesitate to contact us with questions, concerns, or suggestions to help us better our services.