# UNIVERSITY OF WINDSOR STUDENTS' ALLIANCE
# FUNDRAISING GUIDE

*A guide by Jeremiah Bowers and Arop Plaek Deng (2020)*

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# INTRODUCTION

This guide is designed to help you by providing key information about UWSA procedures, fundraising do's and don'ts, and ways to maximize fundraising and sponsorships for UWindsor student groups.

# ABOUT THE UWSA

The University of Windsor Students' Alliance (UWSA) is the full-time undergraduate student union at the University of Windsor. Our mission is:

> *We will be recognized as the best student-led organization designed to meet students' needs. We will strive relentlessly to enhance student life through advocacy, representation and service.*

## Advocacy

The UWSA supports students in obtaining a post-secondary education, regardless of financial or accessibility needs. The UWSA will defend students' interests by advocating for students at all levels of University of Windsor governance. In Fall 2019, the UWSA, through its membership in the Canadian Federation of Students, successfully won a ruling from the Ontario Divisional Court that quashed the Ontario Government's "Student Choice Directive."

## Service

The UWSA provides key services for students such as the health and dental plan, student scholarships, peer-to-peer centres, social justice and accessible education campaigns, and much more other programming. UWSA strives to provide students services[1] that will enhance and provide a safer, more accessible, and community-driven education. We achieve this mandate through such services as our food pantry program ensures all students have access to healthy foods to properly engage in their studies, recognizing that 39% of post-secondary students are "food insecure."[2] Likewise, our Peer Support Centre offers peer-to-peer counselling so students can receive the mental health support necessary to thrive in their education.

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[1] Visit www.uwsa.ca > Services for more information.
[2] "Hungry for knowledge: Assessing the prevalence of student food insecurity on five Canadian campuses," Meal Exchange, 2016.

**Representation**
The UWSA represents all full-time undergraduate students on all major bodies and committees of the University to put forward all student concerns, desires and needs. The UWSA does that through democratically elected representatives who serve students through various ways. An elected Board of Directors help govern and facilitate discussions through the amendment and creation of policies, approval and discussion of new services, and more. Through this representation, we have seen many victories. In 2013, the UWSA, through its efforts in the University Senate, was instrumental in bringing back Reading Week. In Spring 2019, the UWSA launched a $2.1 million renovation project for the Student Centre in 2019 to bring about a more technologically adept, comfortable and forward-thinking student building. If interested in learning more about our victories, please visit www.uwsa.ca/wetheunion.

# YOUR FINANCES

As a ratified student group, your finances are directly facilitated and organized by the UWSA Vice President Finance and Operations (VPFO) and the UWSA accounting team. The VPFO oversees our health and dental plan, bus pass program, student groups and internal operations of the UWSA. Their email is: vpfuwsa@uwindsor.ca. For operational group support that is not related to finance, you should contact the UWSA Student Groups Coordinator studentgroups@uwindsor.ca.

Here are some of the main UWSA financial guidelines:
1. No club may operate its own bank account as finances are run through the UWSA
2. Signing authorities who receive cheque requisitions must attach the original itemized receipt to the requisition
3. **Cheques must be issued to:**
      **"University of Windsor Students' Alliance (UWSA)"**
4. All expenses within your approved budget will be accepted. Alcohol, cannabis, and any illegal substance will not be reimbursed and must not be part of any group budget.
5. Each student group is responsible for generating and monitoring their own income and expenditures. Every group should designate an executive. treasurer to plan and budget the activities/events of your student group.
6. All accounts are run through the student union. Constant communication is essential to operate a sound and transparent budget.

7.  Before making purchases, communicate with the student union representatives to make sure it fits the guidelines for reimbursement.
8.  In order to receive reimbursements and to advertise as a UWindsor student group, your group must be ratified with the UWSA (start a group on www.hub.uwsa.ca to ratify your group, as well as to view all currently ratified groups).
9.  For the full policy and guidelines, check out the student groups handbook
    - https://cutt.ly/Te26239

## Budgeting

Finances can be intimidating but once you set up and agree on procedures your budget will make your group more secure, trustworthy, and transparent. Budgets can be described as a statement of estimated income and expenses of the student group. Budgets can be broken down into smaller sections, each for its own respective event. It allows the group to monitor a plan, accommodate necessary changes, and create successful transactions throughout the year.

Templates can help get this process started. As you use the templates you can make notes for the future treasurer to make the transition run smoothly.

- https://www.smartsheet.com/free-event-budget-templates-simple-complex

If you need further assistance in setting up processes for your group, reach out to the UWSA Student Groups Coordinator or the Vice President Finance and Operations for some assistance.

# EVENT PLANNING 101

Understanding the logistics behind planning events can help reduce cost and save money. Here are some key strategies you can use when planning an event.

- Be organized
    - Keep track of everything you need to do on a schedule. This includes deadlines and timely alerts that allow you to prepare for the deadlines you need to meet. Have a central place where the documents are kept (contact preferences of all parties involved; to do lists with alerts, deadlines and assigned tasks; early check-ins that allow a buffer of timer for when things go astray)

- Make realistic deadlines.
    - You will need time to make things happen. Knowing how much time you have as a student is tough. Assignments and readings may take longer than anticipated, your employer may re-schedule your part-time hours, someone on the planning committee will desert the group or play a dysfunctional role, and any group member is highly susceptible to personal challenges due the challenges of student life.

- Budget
    - A budget allows you to develop scenarios that you can follow depending on what happens in the event. For example, you should have best-case, worst-case, and most-likely case scenarios developed in your budget plan. For example, you need to know which expenses can be cut if attendance at your event runs low. Conversely, you need a plan for when more people than anticipated want to attend the event. Will there be a limit? Will there be a waiting list? Will there be another venue?

- Find your audience
    - Finding people to attend and participate in events means including the people who will get the most benefit from being there. However, it is possible that other audiences (or other groups) may be interested in coming. Once you have a basic plan for the event, discuss with people you think might attend and get their feedback. Another strategy is to have each group member commit to bringing x number

of guests or to sell x number of tickets for the event. This is a good way to meet event minimums.
- o As you recruit more people to be involved in the planning of your event it also means that your network of potential guests should expand.

- **Early planning**
  - o It is important to start on an event as soon as possible. Certain necessities such as performers/speakers or venues can be booked fairly quickly. But it's better to ask early and confirm early in the event that you have trouble finding the people you need to have a successful event.
  - o For example:
    - smaller events:
      - should take about three weeks to one month to plan
      - examples can include bake sales, a dance party, social gatherings, etc.
    - medium-sized events:
      - should take about three– four months to plan
      - can include galas, formal event, large speaker sessions, etc.
    - large events:
      - can take over five months to plan
      - can include conferences, tournaments, concerts, etc.

- **Self-care**
  - o Ideally, this is one of the most important parts of fundraising and planning an event. Often time, people volunteer to organize or be part of an event without considering how it will fit into their lives.
  - o Do you have time to complete the event even if something happens in your personal life? Do you have the personal support system needed to complete the event?
  - o Planning and organizing events can be very stressful and induce a lot of pressure onto yourself, your loved ones, and your team. When it seems like it's becoming a lot to handle, see if you can delegate tasks to other members or simply taking a break on it for a little while. This can allow your brain to rework and allow it to rest, which could help bring more ideas that you may have not even thought of.

- o Note: if you're not mentally able to work on something, it may be worse to push through instead of taking time to de-stress and go back to your work.

- **Working in Groups**
  - o One of the main forms of conflicts in a group setting is setting informal and formal roles/tasks for each member. Sometimes you want to take on a role but that role may be taken. Be flexible and take on roles where you feel most confident.
  - o Your group should decide in advance the procedure for voting on decisions. Which decisions are voted on by the group? Which decisions can be decided by subcommittees?

# MARKETING/PROMOTION 101

Marketing should be one of the most important attributes of planning events and promoting your student group.

Here are some points to keep in mind when doing promotion/outreach:

- **Promoting before an event**
  - o Make posters that you can post around campus
  - o Schedule social media posts at least two weeks before the event. If the event occurs annually, pictures or videos of the previous event could be used to entice students to come out this year.
  - o Have group members commit to selling a minimum number of tickets or generating a minimum number of interested and engaged audience members.
  - o Create a digital space where people can go to get more information (Instagram, Facebook, Website, Blog, etc.). All your promotional material should have an email, phone number, webpage, or social media channel so that people can get additional information.
  - o Posters have to be approved prior to posting on campus. Make sure you receive approval from the administrative secretary of the building in which you wish to hang up posters. To hang up posters in the CAW Student Centre, request approval by email from the CAW Information Desk (Laurie McGhee, harrow@uwindsor.ca).

- **Promoting during an event**
  - It is important that people know about your event while it is happening. For example, if you are using a public space, you may want to put up a sign at least one week before so that people know the public space will be used for your event.
  - Be sure that you have selected group members to orient and direct people during the event. People will need to know emergency evacuation procedures, the location of the washrooms and the parameters of the event.

- **Promoting after an event**
  - Have people send in their favourite photos so that you can post them after the event. If people know that you will be doing this, you need to assign your social media coordinator the task of posting the content as soon after the event as possible.

- **Logos**
  - If your student group has a logo, stamping that logo on everything and anything that goes out to students is probably one of the best ways to get your name out there.
  - If you don't have a logo, make one! Ask your UWSA Student Groups Coordinator (studentgroups@uwindsor.ca) if you're unsure where to start.
  - Be sure that you follow proper procedures for the use and approval of any company logos (including the UWSA logo and the University of Windsor logo). Details about the UWindsor logo can be found on the Public Affairs and Communication Website.
  - Remember that adding logos to your website means that you need to seek approval for your messaging as you are no longer representing just yourself or your group.

- **Merchandise**
  - Businesses may not want to share funds but may share free swag. Make sure you acknowledge businesses for what they will contribute to the event. This can be done in flyers, programs, announcements, and on social media.

- **Social Media and Traditional Media**
  - Try to gain access and publish to larger social media accounts on campus (snap chat or Instagram takeovers can work well).
  - Try to select relevant people who are active and have lots of connections, followers, friends etc., on social media to promote your event.
  - Reach out to the Social Media Coordinator at the University of Windsor ([socialmedia@uwindsor.ca](mailto:socialmedia@uwindsor.ca)).
  - You can find contact information for the [main UWindsor public affairs professionals online](#). This office has experts in generating press releases, access to the publication of the Daily News and the main UWindsor social media channels.
  - Assign a person the solo task of maintaining social media content before, during and after. Many groups think they can do this while running the event, however it is better to assign the task to a person so that you don't need to multi-task during the event.
  - Be sure to search, verify then publish hashtags and searchable event wording prior to the event. Once you have agreed on the event hashtag publish it online and in the program prior to the event.

- **Creating Mini Events or Challenges**
  - Mini events and/or fun challenges can help increase attendance and raise money. For example:
    - Create a small event you can hold in the student centre where students can guess how many jellybeans are in a jar for $1.00 a guess. The winner can receive a gift card of $10.00-$15.00 and the jar of jellybeans as a prize; meanwhile, you've collected money to go towards another event in the future.
    - This is just one possible idea to explore. Do something that is inventive, creative, and engaging (see [here](#) for more ideas). You want your event to stand out from all of the others!

- **Event Coordinator**
  - Create a position within your student group dedicated to promotion and marketing of the student group/events.

# FUNDRAISING 101

Fundraising is essentially the process of asking for donations or financial support. Potential organizations and people may include, businesses, government, foundations, etc. You should always find partners that are interested in the success of your group and who align with the values of your group. There are a variety of ways to fundraise, it's up to you as a student group to pick the most efficient method of fundraising to get the most out of the effort that you put into fundraising.

As a fundraiser, key qualities in being able to effectively receive donations and sponsorships is to understand your potential donors, have a lot of <u>enthusiasm</u>, being organized, and being trustworthy. Some tips to keep in mind when going to fundraise:

1. **Educate yourself about the business/people you are approaching for donations**. Do your research to see what interests them and when/how they make decisions about donations.

2. **Setting realistic goals** involves a lot of informal conversations and reaching out to people with fundraising experience.

3. **Set up a team of fundraising volunteers** and develop a plan so that people aren't crossing paths as they ask community partners for donations.

4. **Do everything in your power to meet face-to-face** with those who you are approaching for money and be prepared to share fund-raising documents at the meeting.  If you are unable to meet with students, delivering documents in a customized communication may be a successful strategy.

5. **Set up protocols** so that sponsors have specific details such as payment, timelines for payment, forms of payment (cheque, online, etc). Many new organizations forget to plan the essential elements of ensuring the cash transactions and the collection and assembling of donated materials is completed prior to the event.

6. **Be sure to thank and keep track of who donated** in years past and from this year. Set time aside to pre-write, address and sign thank you cards before the event! This is a simple yet effective method to help future teams build long-term partnerships with your group.

## Who Do I Approach for Donations?
- *Personal connections*
  - Reach out to you or your team's family, friends and neighbours. Check to see if they have any businesses that might align with your goals or who may want to support you. These are your most probable donators since you have a personal connection to them.

- *Businesses*
  - Organizations and businesses are open to supporting initiatives and activities that are facilitated by student groups. A lot of times, these businesses have a budget that's purposely set aside for donations and sponsorships. However, they may be getting a lot of asks, so ask early, and bring professional documents with the information they need to make it easy for them.

- *The Student Unions (UWSA/OPUS/GSS)*
  - There are three student unions on campus. University of Windsor Students' Alliance (UWSA), Organization of Part-time Undergraduate Students (OPUS), and the Graduate Student Society (GSS). All three unions have mandates to help out students and student initiatives on campus. The other groups may be interested in collaborating with your group on initiatives and events.
  - As a ratified student group with the UWSA, you can submit a *Funding Request Form* on the *UWSA Hub*. After submitting, the UWSA Finance Committee takes a look at all the applications and discusses to whom they should allocate the funds to. This process is done thoroughly and with careful consideration. Any amount above $300.00 must be approved through the UWSA Finance Committee.
  - *UWSA Student Groups Funding Request Form:*
    - https://cutt.ly/Le2Fln2

- *University of Windsor Administration*
  - The University of Windsor has a separate budget for enhancing student life on campus. This is a part of the University's focus on the student experience. You can fill out the [*Student Life Enhancement Fund* form](#).
  - [http://www.uwindsor.ca/studentexperience/307/student-life-enhancement-fund](http://www.uwindsor.ca/studentexperience/307/student-life-enhancement-fund)

- *Academic Societies*
  - There are [13 academic societies](#) that represent students of the 12 major faculties. The societies work with their faculty to manage issues and facilitate programming that will impact students of that faculty. These societies receive fees from students and can support groups and events that will impact their faculty.

# SPONSORSHIP 101

Sponsorship is a big part of fundraising and can play an essential role in asking for monetary funding. Sponsorship is generally a form of marketing that provides certain benefits to the sponsor. Sponsorship can be effective especially when the sponsor and the party needing the sponsorship have the same goal, value or vision. The general idea of sponsorship can be to develop strong relationships between the business due to their common ties with the sponsored individual, event, or the organization. Sponsorship can provide a connection and networking opportunity for both parties to support each other in ways that benefit both of them potentially for years to come.

A key to being able to provide sponsorship is having a professional sponsorship package. Sponsorship packages can be tiered or just one simple sponsorship opportunity. To increase potential sponsors, creating a tiered sponsorship package can help allow for more flexibility, which would allow for more sponsors. In this package, you can breakdown how much money you want to ask into smaller amounts and split the incentives as well. The higher the amount, the greater exposure the sponsor receives.

A tiered sponsorship package can look similar to this:
- Platinum Sponsor (a maximum of one sponsor)
  - $1000.00 sponsorship

- Reserved spot for five (5) members to join the event for free
- Mention of sponsorship two (2) times throughout event
- Logo on promotional material (online/paper)
- Gold Sponsor (give to a maximum of two sponsors)
    - $500.00 sponsorship
    - Mention of sponsorship two (2) times throughout event
    - Logo on promotional material (online/paper)

- Silver Sponsor (unlimited sponsors)
    - $300.00 sponsorship
    - Mention of sponsorship one (1) time throughout event
    - Logo on promotional material (online/paper)
- Bronze Sponsor (unlimited sponsors)
    - $100.00 sponsorship
    - Logo on promotional material (online/paper)

For more examples of sponsorship packages or if you have any more questions on how to create one, reach out to the UWSA Student Groups Coordinator (studentgroups@uwindsor.ca) and they can help coordinate that with you.

## OTHER SOURCES

There are a multitude of other sources that can be found all over, whether it be the UWSA staff/Executives, at the University of Windsor or just online through a simple Google search. Specifically, to assist in creating a sponsorship package for example, the Canadian Conference on Student Leadership (CCSL) sponsorship package is a good resource to use as a reference. There are other sources that we've seen online that can help give ideas or more advice on becoming a successful student group.

- https://docs.wixstatic.com/ugd/21721b_f684edee6660493280fe240b52708dfb.pdf
- https://www.wildapricot.com/blogs/newsblog/2017/03/13/effective-fundraising-ideas-for-small-nonprofits
- https://www.gov.mb.ca/chc/pdf/ch_fundraising_ideas.pdf
- http://www.canadianfundraising.com/list.php
    - This can be useful in finding ideas on what to give away or purchase to aid in fundraising that can be customized to your group.
- https://www.classy.org/blog/25-quick-fundraising-ideas-for-nonprofits-and-charity/

- https://www.eventbrite.com/blog/fundraising-ideas-ds00/
  - This is more centred towards non-profit fundraising in America but has a lot of useful tips and tricks that can work for your student group!

## OTHER RESOURCES

- https://www.undebbangor.com/pageassets/resource_pdf/Student_Fundraising_Guide.pdf
- http://www.uwindsor.ca/studentexperience/307/student-life-enhancement-fund
- https://www.afscanada.org/en/fundraising/
- https://thesponsorshipguy.com/2017/09/what-is-sponsorship-and-how-does-it-work/
- https://www.managementstudyhq.com/objectives-of-sponsorship.html
- https://www.ama.org/the-definition-of-marketing-what-is-marketing/
- https://www.myaccountingcourse.com/accounting-dictionary/budget