

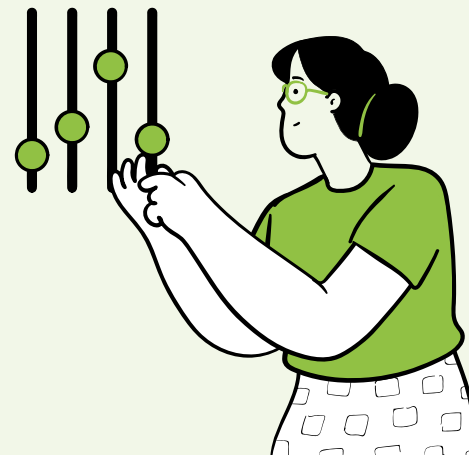
# WORKBOOK UNIT 1A:

## Introduction to Fundraising



## Module Description:

The goal of Unit 1A is to build participants' knowledge of the latest trends when it comes to fundraising in the international cooperation sector, from the perspective of counterpart organizations, and those operating in 'donor' countries, i.e., Canada.



Unit 1A has two sections. The first section looks at the Basics of Local Fundraising through Change the Game Academy; and the second section is Canadian training content. The first section identifies the key reasons for raising funds locally and provides a high-level definition of fundraising. The Canadian content examines one of the most prevalent and contemporary trends in the international cooperation industry, that of 'decolonizing aid.'

SECTION	LEARNING OBJECTIVES
<p><b>Change the Game Academy</b></p>	Identify key reasons for raising funds locally
	Explain the essential components of an integrated fundraising plan
	Map the actual and the desired financial situation of your organization
	Analyze your organization's current financial situation
	Feel more confident about developing your own diversified fundraising strategy
<p><b>Supplementary Canadian content</b></p>	Examine key trends and considerations in the international cooperation sector
	Identify challenges and opportunities in fundraising within the Canadian international cooperation sector
	Map specific opportunities and challenges of your organization's current financial situation
	Analyze equity considerations and the impact on fundraising

## Links to Training Content:

Change the Game Academy: *Basics of local fundraising*

Canadian Content: *Spur Change Resource Library*

## Unit 1a Exercises:

The first section of this unit, through Change the Game Academy, guided you through an analysis of your organizations' current income sources and future desired income sources, to determine the financial sustainability of your organization: the more diverse an organization's funding sources, the more sustainable. It is critical to develop a fundraising strategy to achieve your organization's desired future state, and a great place to start is with asset mapping.

### What is asset mapping?

The process of identifying and cataloging the resources, strengths, and capabilities of a community, organization, or network. Resources can include: people, relationships, videos, images, stories, knowledge, products, events, visits, reports, webinars, skills, and expertise. The goal of asset mapping is to build a comprehensive understanding of the resources available within an organization—in this case, resources that can be used to support your fundraising strategy!



# EXERCISE 1:

## Mapping Organizational Resources

For the purposes of this exercise, we suggest you begin your analysis by listing all internal and external communications your organization produces that could be potential fundraising assets. Please fill in the table below, and add more rows as needed:

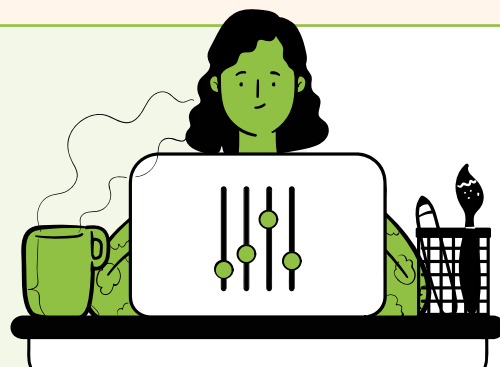
RESOURCE (INCLUDE LINK IF RELEVANT)	WHAT WOULD NEED TO BE DONE TO USE THIS FOR FUNDRAISING?
<i>Annual Report</i>	<i>Extract key impact reports into paragraphs that can be used in emails to potential funders.</i>

# EXERCISE 2:

## Mapping Existing Relationships

Consider existing partnerships and relationships your organization has, especially relationships that could support your organization’s fundraising efforts. Please fill in the table below, and add more rows as needed:

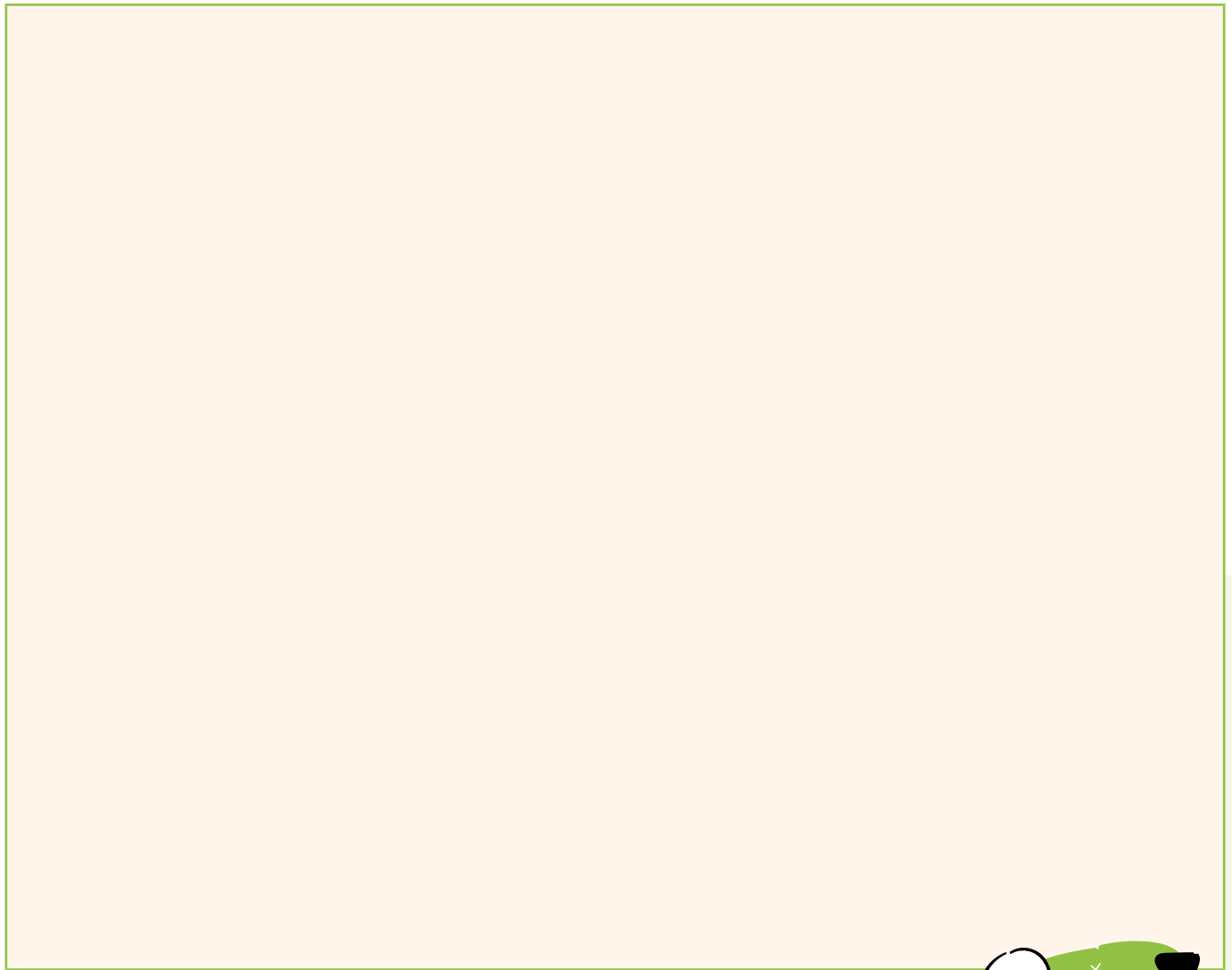
<b>STAKEHOLDER, SUPPORTER, OR OTHER PERSON CONNECTED TO YOUR ORGANIZATION</b>	<b>WHAT COULD THEIR ROLE BE IN SUPPORTING FUNDRAISING?</b>
<i>Board Member with connections to corporate funders</i>	<i>Ask if they would be willing to introduce your organization via email or phone call?</i>



## EXERCISE 3:

### Self-reflection

Consider your organization's current approach to fundraising. In what ways does the approach reflect the principles and practices of the decolonizing aid movement? Can you identify opportunities to better reflect these principles and practices in your organization's fundraising approaches?



# UNIT 1A RESOURCES CITED:

- Amref Health Africa. (2022, April 1). Who Owns the Story? Participatory Storytelling Project Seeks a New Answer. Newsroom. <https://amrefuk.org/news/2022/04/who-owns-the-story>
- Belfi, E. & Sandiford, N. (2021). Decolonization Series Part 1: Exploring Decolonization. Interdependence: Global Solidarity and Local Actions. Retrieved on March 6, 2023 from <http://globalsolidaritylocalaction.sites.haverford.edu/what-is-decolonization-why-is-it-important/>
- Government of Canada. (2022, April 7). A Plan to Grow Our Economy and Make Life More Affordable. Federal Budget. Retrieved March 6, 2023, from <https://www.budget.canada.ca/2022/home-accueil-en.html>
- Government of Canada. (2012, April 20). Fundraising by registered charities. Policies and Guidance. Retrieved January 11, 2023, from <https://www.canada.ca/en/revenue-agency/services/charities-giving/charities/policies-guidance/fundraising-registered-charities-guidance.html>
- Inter-Agency Standing Committee. About the Grand Bargain. Retrieved January 11, 2023, from <https://interagencystandingcommittee.org/node/40190>
- McConnell. (2023, February 15). An Update on our Investment Strategy. News. Retrieved March 6, 2023 from <https://mcconnellfoundation.ca/an-update-on-our-investment-strategy/>
- Peace Direct. (2023, January 11). The Nine Roles That Intermediaries Can Play In International Cooperation. News and Views. Retrieved March 5<sup>th</sup>, 2023, from <https://www.peacedirect.org/us/publications/nine-roles-for-intermediaries/>
- Start Network. (2023, January 3). Unlocking Localization. News. Retrieved January 5, 2023 from <https://startnetwork.org/learn-change/news-and-blogs/unlocking-localisation>
- The Editorial Board. (2021). Foreign Aid is Having a Reckoning. The New York Times. <https://www.nytimes.com/2021/02/13/opinion/africa-foreign-aid-philanthropy.html>

# LEARN MORE!

*ARC Hub*

*Charter for Change*

*CRA's Charities and Giving Glossary*

*Decolonising Aid: A reading and resource list*

*CRA's Draft guidance note on non-qualified donees*

*Global Mentoring Initiative: Dimensions of Localisation*

*ICN Research: Towards a More Decolonial, Anti-Racist, and Feminist Public Engagement*

*ICVA: definition of localization and unpacking localization*

*Canada's Income Tax Act*

*Literature Study: Interrogating the evidence base on humanitarian localization*

*NEAR Localisation Performance Measurement Framework*

*The New Humanitarian's Critique*

*2016 World Humanitarian Summit* (and subsequent *Grand Bargain agreement*)

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## UNIT 1A GLOSSARY:

**Fundraising** – An activity, direct or indirect, that includes a solicitation of present or future donations for cash or gifts in kind from the general public. (CRA)

**Grantee organization (formerly termed non-qualified donee)** – A person, club, society, association or organization or prescribed entity, but does not include a qualified donee. A grantee is an individual or organization that the charity works with to further its charitable purposes. (CRA)

**Localization** – The process through which a diverse range of humanitarian actors are attempting, each in their own way, to ensure local and national actors are better engaged in the planning, delivery, and accountability of humanitarian action, while still ensuring humanitarian needs can be met swiftly, effectively and in a principled manner. (ICVA)

**Qualified donee** – An organization that can issue official donation receipts for gifts it receives from individuals and corporations. It can also receive gifts from registered charities. (CRA)



