

WORKBOOK UNIT 1B:

Discovering Fundraising Techniques



Unit Description:

The goal of Unit 1B is to build participants' knowledge of various fundraising techniques including their applicability in the Canadian context.

Unit 1B has two sections including Fundraising Techniques through the Change the Game Academy; and Canadian training content. The Change the Game Academy section provides participants with a summary of 10 fundraising techniques, and an additional 6 advanced techniques, with additional resources on each, for further learning. The Canadian content examines guidelines for fundraising within the Canadian regulatory framework, as stipulated by the Income Tax Act.

SECTION	LEARNING OBJECTIVES
Change the Game Academy	Identify the key characteristics of effective fundraising
	Explain the essential components of creating a fundraising team
	Examine how you can maximize organizational skills and resources to ensure success with fundraising
Supplementary Canadian content	Understand what fundraising is within the Canadian regulatory framework
	Reflect on what works and what is challenging with regards to different fundraising techniques in the Canadian context

Links to Training Content:

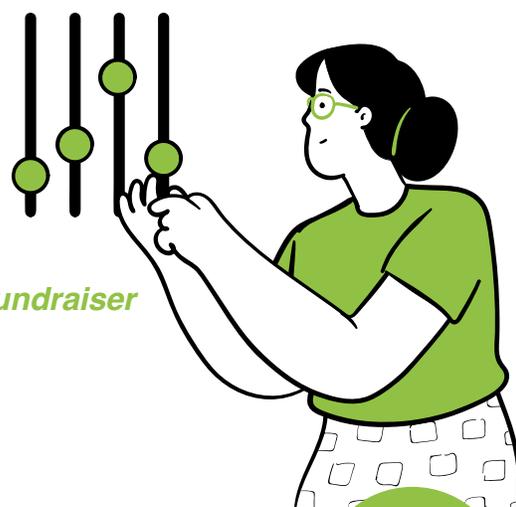
Change the Game Academy: *Basics of local fundraising*

Canadian Content: *Spur Change Resource Library*

Case Study:

Change the Game Academy: *Right to Play's Virtual Challenge Fundraiser*

<https://whydonate.com/fr/blog/idee-pour-recolter-des-fonds/>



EXERCISE 1:

The Change the Game Academy section emphasized the importance of fundraising with a team, and that your team should be composed of people from different parts of the organization, including Board Members and if possible, volunteers. Reflect on who you could recruit to join your fundraising team, and which task or tasks you would assign to them.

Please complete the table below, and add more rows as needed:

WHO? (NAME MEMBERS HERE)		WHAT COULD THEY DO? (LIST RESPONSIBILITIES/TASKS HERE)
<i>Board members</i>		
Staff (including program staff)		
Volunteers (including former board and staff members, supports, students, etc.)		
Who else?		

Once you have completed this list, please reflect:

How diverse is this proposed team? To what extent does this team reflect your organization's overall level of diversity?

Does this fundraising team understand the core rights and justice issues your organization works to achieve? Can they speak to these issues effectively?



EXERCISE 2:

Re-visit your ranking of fundraising techniques

The Change the Game Academy section described a number of fundraising techniques, and asked that you rank each, from 1 to 5, based on their suitability for your organization; 1 being not suitable and 5 being very suitable.

After learning more about fundraising within the Canadian regulatory framework, re-visit your ranking of each technique. Are there any rankings you would change now that you've gone through the Canadian training content for Unit 1B? What are some questions that came up for you? Are there any techniques you feel are missing?

There will be an opportunity to discuss these questions and your reflections in the upcoming Zoom session for Unit 1 (provided you are participating via a guided cohort offering of this unit).

Please complete the table below:

FUNDRAISING TECHNIQUE	CHANGE THE GAME ACADEMY RANKING (1-5)	REVISED RANKING (IF APPLICABLE)	REFLECTIONS/ QUESTIONS
Events			
Personal solicitation/ individual giving			
Network fundraising			
Online fundraising campaigns			
Volunteering			
Donations-in-kind			
Raising money through young people and in schools			

FUNDRAISING TECHNIQUE	CHANGE THE GAME ACADEMY RANKING (1-5)	REVISED RANKING (IF APPLICABLE)	REFLECTIONS/ QUESTIONS
Periodic donations through adoption of a project			
Collections			
Product sales			
Legacy fundraising			
Direct mail			
Telephone fundraising			
Street fundraising			
Major gifts			
Diaspora (community) funding			



UNIT 1B RESOURCES CITED:

Government of Canada. (2019, January 24th.) Checklist. Retrieved January 26th, 2023, from <https://www.canada.ca/en/revenue-agency/services/charities-giving/charities/checklists-charities/basic-guidelines.html>

Government of Canada. (2017, April 7th). Disbursement quota calculation. Retrieved January 26th, 2023, from <https://www.canada.ca/en/revenue-agency/services/charities-giving/charities/operating-a-registered-charity/annual-spending-requirement-disbursement-quota/disbursement-quota-calculation.html>

Government of Canada. (2019, November 27th). Engaging in allowable activities. Retrieved January 26th, 2023, from <https://www.canada.ca/en/revenue-agency/services/charities-giving/charities/checklists-charities/engaging-allowable-activities.html>

Mark Blumberg. (2009, February 15th). Canadian Charities and pharmaceutical donations-some ethical issues. Retrieved January 26th, 2023 from https://www.canadiancharitylaw.ca/blog/canadian_charities_and_pharmaceutical_donations_some_ethical_issues/

LEARN MORE!

Awareness Campaign Guide

Mark Blumberg's Website

CRA Guidance on Cause-Related Marketing

Digital Public Engagement Toolkit: Research and Findings

Dismantling Privilege and Power Dynamics in Fundraising

Donor profiling template

Growing Donations Through Building Trust

Guidebook on alternative funding models

Main Fundraising Techniques

Online fundraising tools

Stay in touch with donors

Tips to secure repeat donors

6 ways to say 'thank you'



