

10.0 Getting Money

Fundraising & Grants

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10.1 Building Relationships

Building things is rarely free. Travel is almost never free. Tabling materials are never free. A strong ESW chapter often needs to raise money to pay for project or educational materials, attend conferences, or help promote its actions and build local community. Similarly, a chapter rarely has all the things it needs to do amazing projects - a lack of space, a lack of invested stakeholders, or a lack of expertise can all decrease impacts. Building external relationships can result in funds, but can also provide project partners, mentors, or unsuspected advocates and visibility. Relationship building should happen before, during, and after your fundraising process. These two areas are undeniably hard, but they're also the keys to success for any organization, including your chapter.



Building Relationships

The verb here is important: relationships are built, rather than appearing fully formed. They take time to create, and need maintenance to be useful. Often, you'll meet someone at a campus or community event, tell them that you work with an ESW chapter (have your pitch practiced!), and talk about potential ideas. If you

need to create new partnerships without existing contacts, email the person in charge to tell them a little about ESW, describe what your chapter works on, and see if they'd be interested in working together. For finding new donors or sponsors, see Section 8.2 on Fundraising. Regardless of how you meet, there are some common pieces to creating strong relationships.

Identify and Track your Donor Base

Before asking for money or materials, you need to identify your donor base – your network of potential supporters. There may be local organizations or chapters in your area with an interest in public service, sustainability, international development, or supporting students. Examples include local Rotary Club chapters, green professional networking events (Green Drinks), ASHA for education (India), etc. For organizations, find out if you can make a presentation or announcement at their next meeting.

Whichever set of individuals and organizations you identify, make sure to keep track of them. This can be as simple as a spreadsheet with dates of donations and notes on preferences and interests, or as complicated as a full database with a robust user interface. As an example, ESW-National uses CiviCRM, a free and open source system, to track all of our constituents and automatically record online donations for future reference. That's probably too much for your chapter, but if your

chapter does large projects on a regular – or wants to – you'll need a solid system to avoid losing track of who you've contacted, who's donated in the past, and log potential new leads.

Create Marketing Materials

For many partners, particularly those that you're actively reaching out to, having some well-made materials that describe and showcase your chapter, project, or event is essential. Whether digital or physical, marketing materials such as a trifold pamphlet or sponsorship brochure succinctly describe what you're about and/or why the other entity should work with you or give you money, all in a visually appealing form that they can read on their own time. In a full development process, some members of the team will build up the donor base or find potential partners while others develop or update these materials. Content and appearance are equally important. Whenever you present materials to an outside individual or organization, you'll be affecting their opinion of ESW as a whole, even if your materials clearly

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identify you as a chapter (as they should). We want your materials to look awesome and represent us well, so please ask us to review drafts of whatever you create – we’re happy to do so! You can see examples of materials that ESW-HQ and various chapters have used in the online Guidance Materials.

Content

The amount of text and images you need will vary depending on the goal and size of the initiative. For general interest materials, keep everything on one sheet of paper. For large projects or events, your sponsorship brochure should be 6-10 pages long. Regardless of size, focus on brevity and clarity, and remember that pictures are worth 1000 words.

You should make sure you include the following information:

- Basic information about ESW as an organization – see our About Us pages for examples
- Brief description of your chapter’s focus areas and key projects. For sponsorship brochures, this could be combined with general ESW info

as part of an intro letter from the project leader.

- How many students are involved, and potentially some statistics on diversity – are many departments represented? Is there a good gender mix?
- Contact information—how can they contact you and whom should they contact?
- For Sponsorship Brochures:
 - Explanation of the event/initiative for which you need funding. Be as precise as possible – saying that you will be building a 3 kW solar array for a local school is much better than saying that your project will work with local schools on renewable energy projects.
 - Budget – how much money do you need, and what categories (e.g. materials, labor, travel, food, etc.) will it go towards? A simple table is a great choice here.
 - Sponsor Benefits – what specific things will you provide to people that give you money? Common options include logo space on whatever you build or on a project website, recognition in press releases, media

coverage, or central conference events, regular project updates, opportunities to tour, interact with, or recruit the students doing the design or construction, and workshop space at conferences. If you’re searching for ideas, look at the perks from similar campaigns on crowd-funding sites such as Kickstarter or IndieGoGo.

- List of other supporters— if you have already secured funding from your university or other companies, mention this; companies like to support initiatives that are successful and if they see that other companies are supporting your cause, they will be more likely to do so as well
- Draft up text, put it in an outline, and then have someone else read it. Spend at least 24 hours away from the material before coming back to edit based on their comments. Always try to find ways to say the same things with fewer words, as you’ll either have more space for more information or a larger font size that will be easier to read. Expect to go through at least three rounds of review before the document text is ready for broader use.

Appearance

Most companies or individuals will look at your materials for about 30 seconds before deciding that they are not interested, or that they want to find out more about your initiative. Whatever you present – digital or print – must be attractive and the important information must be easy to find. Typos, grammatical errors, or awkward layout can make the difference between gaining sponsorship and wasting time and effort on a sponsorship package that gets thrown in the recycling bin.

The process of making beautiful documents is much easier with branding guidelines, and you should read through ESW’s Branding Center. We’ve developed a set of colors, fonts, and basic templates that work well together, as well as tips on how to use them. Build design time into your schedule, particularly the first time you make a document. Have several people edit the package, have someone work on the layout, and do not hesitate to contact ESW-National for feedback.

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One additional resource that you should talk to for sponsorship brochures is your local development department, either for engineering in particular or the school overall. In many cases, they may be willing to help you with design, distribution, or both. Helping you lets them promote interesting work that their students are doing to alums or corporate contacts while tracking who is asking these entities for funds (see Section 8.2.3). You can get very professional work for free, but make sure to allot an extra month for initial meetings and design time.

Manage Your Relationships

Once you've connected with partners, donors, or sponsors, you need to stay in touch and keep the relationship active for maximum effectiveness. This can seem time-intensive, but a good spreadsheet or database and some quick habits can make it much easier. Maintained relationships lead to regular or repeat donations, new and bigger project ideas, and broader exposure as people tell others about what you're doing. A few

suggestions:

Send Quick Relevant Updates

If you get featured in some media source - school newspaper or national news - send a quick link and note to any relevant contacts. The same applies if you hit a major project milestone, like an initial test or prototype, and have a few photos in an online album, or you have a public event. It doesn't have to be much to remind them that they are involved in something that is having real-world impacts. Do this every few weeks if possible, but not more than that. Remember to post your updates on social media as well.

Send a Quarterly Circular

Once every three months (possibly skipping summer), put together a 1-2 page PDF with key photos and a recap of what the chapter has been doing. This includes project updates, educational events, and safe-for-work social pictures. You might choose to focus on a specific project or individual. As with all materials, the first instance

will be slow because you'll need to build a template, but future issues will be faster, and will slowly provide a great archive of what you've accomplished. Send this digitally to your whole base, including ESW-National - we love getting these. ESW-Northwestern and ESW-RPI have some great examples if you need inspiration.

Have a Stakeholder Banquet

Twice a year - once around Thanksgiving and once in April/May - invite all the stakeholders in your projects to an afternoon or evening event to share food and project updates. This should include all project partners and major funders, and you should plan on spending at least \$20/person. While it's an investment of both money and planning time, being able to give some updates in person and get some suggestions on all projects from all partners is invaluable. Stakeholders often enjoy meeting each other too! ESW-UCSD is a great group to talk to if you have questions.

10.2 Fundraising

Fundraising (or “How to get other people to give you their money”) comes in a huge range of shapes and styles. One of the most important initial questions is how much money you need. For amounts up to ~\$500, local fundraisers - food sales, restaurant nights, donation drives – will likely suffice. Up to ~\$2500, working with academic departments, small companies, or campus grants is a good approach. Above \$2500 you’ll need to develop a more robust development team to find corporate sponsors or apply for larger grants from programs like the EPA’s P3 competition.

University Grants

The easiest place to find funding will likely be within your college or university. See if your university has a fundraising strategist who can help identify sources and ideas for student groups supported by the university. Remember, a strong Public Relations campaign that engages professors and administrators throughout the year will build those relationships that may eventually lead to funding support. Also, make sure to high-

light positive initiatives undertaken by your chapter – they reflect well on your university, which makes administrators even more willing to support your chapter.

Funding from departments

The College of Engineering may support projects and sponsor or co-sponsor speakers. Non-engineering departments such as the Departments of International Relations, Political Science, etc. might also sponsor specific events or speakers that are of interest to their students. Departments and schools are particularly good targets for event support.

Funding from student societies and organizations

Every university has a student society, assembly, and/or government and likely has engineering societies and other similar student organizations. Many of these organizations have money within their budget to support student initiatives. You will want to find out if there are deadlines for applying for funding from these organizations and learn about the criteria that you must meet to obtain funding.

Campus Grants

You may be amazed at the number of internal grants available at your school when you go looking for them. There are likely grants available to bring in guest speakers, support project teams, or to sponsor workshops, mini-conferences etc. A combination of searching your university website and talking to contacts throughout the university will help you to learn of these types of funding, and which ones would be useful for your chapter.

Funding from Alumni

Alumni are often excited to support new initiatives and engage with students from their alma mater. Similarly, your university is always looking for new ways to get alumni excited about supporting the university and students. Your best bet is talk to the Alumni Relations office within your institution or engr. school to tell them about your chapter and some of the initiatives that you are undertaking. Ask them if they think alumni members might be interested in these initiatives and how you might get in touch with them. Remember that alumni

not only have financial wealth, but experiential wealth as well, providing important contacts and networks. You should be open to the many ways in which alumni might become involved with your chapter.

Local Fundraising

Donations come from friends, family, church members, classmates, passersby, professors, and anyone else you can think of. The challenging part is not being afraid to ask anyone and everyone to support your cause. There are different ways to support each type of potential donor, but in the end, everyone gets asked. They won’t give if you don’t explicitly ask them.

Fundraising Events

If you are looking to raise funds on the order of a couple hundred dollars (at the most), consider hosting a fundraising event. The planning involved could range from a few hours to several weeks. Here we present a few options for fundraising events: ESW-TTU hosts a gaming tournament every year

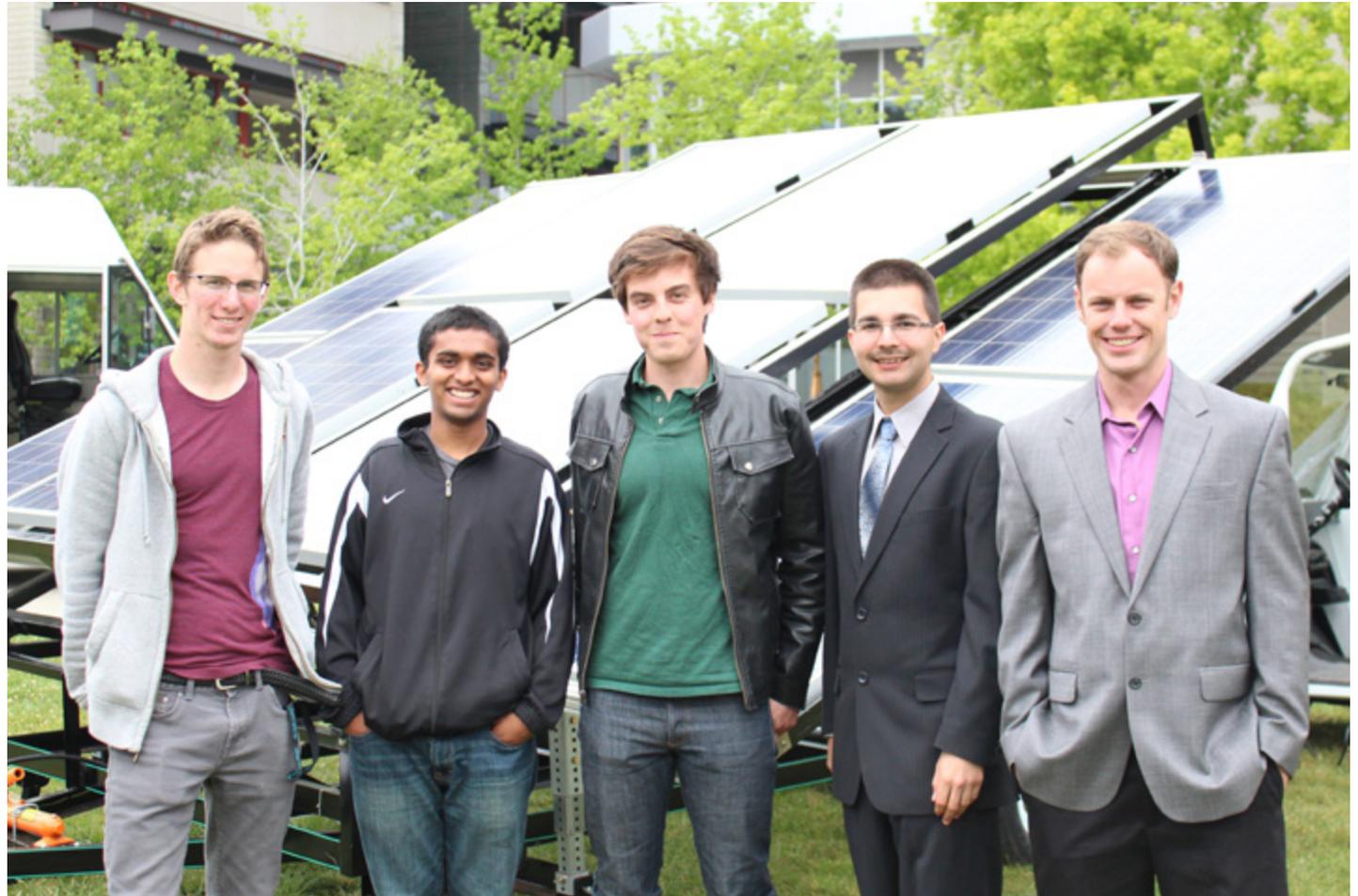
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- Selling flowers (ESW-UCSD)
- Car wash (ESW-Miami Dade)
- Bake sale—extra points if you use a solar oven!
- Dinner/banquet with charged admission
- Auction—solicit members and professors to donate items
- Working with a local restaurant to earn a percentage of sales for a specific date/time.

Personal Solicitation—Making the Ask

Having a personal connection with someone first will always lead to a more successful solicitation. Ask for support from someone who has recently attended one of your chapter events. Or, you can send personalized mass solicitations to event attendees (and other contacts) via email or direct mail (snail mail). In written solicitations, always include the recipient's name, make sure it is spelled correctly, and let them know what exactly you need.

Keep letters short – one page is ideal while two pages is acceptable. You want to capture the interest of the donor without losing them by the end of the letter or worse, having them put down the



letter because it's too long or too vague.

Large Grants

Grants can provide a large amount of money without the same networking process as corporate sponsorship or finding individual donors. However, they

often have much longer timeframes for applications, stronger reporting requirements, and require your team to know how to write grant applications – something people make careers out of. There are a huge variety of materials available on how to write grants, and you can find some

links at the end of this chapter. Finding grants to apply for can be hard. The first place to look is locally – foundations that are specific to your city or region. If you're working with a local organization, they may be able to provide suggestions from their experience. The second place is at

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well-established student-focused programs. These include the EPA's P3 program, which is open every fall, the NCIIA's programs for entrepreneurial ideas, which has many opportunities every year, and the Clinton Global Initiative – University, which is open every winter. ESW chapters have received all of these awards in the past. The third place you should look is ESW-HQ's Opportunities Bank, which lists grant programs and contests we come across. Some of these are annual, some are a single time, and they range from very specific topics to broad international opportunities. At any time in this process, feel free to contact us for help and ideas, since we may have recommendations for your specific project.

Corporate Sponsors

Working with local, or sometimes national companies is a great way to secure large sums of money for projects or large campus events (such as Regional Conferences). Companies are often looking for potential new employees, have funds allocated for community projects, or want to support their local universities. Plus, technical

companies are in a good market - there's a large pool of potential funds available, particularly with an increasing awareness of sustainability.

However, before you approach companies, you need to consider who else may be talking to them or looking for money. As members of an ESW chapter, companies will treat you as part of ESW and part of your school. They may budget their giving for a specific entity, such that if your chapter receives a \$5,000 grant, the school receives \$5,000 less. On a related note, companies can feel overwhelmed or confused if several different arms of what is perceived as the same organization contact them requesting funds – such as several chapters and ESW-HQ all approaching the same company independently. They may give to one, a few, or none of them. The solution to both of these problems is communication. Whenever you approach a company (or several) that your school might have a relationship with, you should talk to your local development office. When you approach a regional or national company that might be appealing

to other chapters or ESW-HQ, you should talk to our development department. In both cases, this is partly so we can coordinate approaches, and partly so we can help each other. ESW-HQ may have contacts for you to talk to at a national firm that have been waiting for the right student project to fund. We might also know of other similar projects, and be able to approach the company to support a larger initiative at several chapters. Local companies - ones that only have a presence in your area, not branches of larger entities – are less likely to need coordination, but when in doubt, chat with us first in case we can help, particularly since we'll be reviewing your marketing materials for you anyway (right?).

10.3 Fundraising—Sponsorship Outreach

Actively Seeking Sponsorship

Once you have a sponsorship package, you are ready to start distributing it. The following steps are recommended when seeking sponsorship:

1. Initial phone call

Start by calling the company to very briefly introduce yourself and your initiative and ask if you can send a sponsorship package to the company. If you have a contact at the company already, they may be in a position to make/push a decision for you. Otherwise, they might direct you to a person to call (in this case you can say “Mike Smith, Vice President of your company recommended that I get in touch with you to tell you about [your initiative]”). Otherwise, check on the Internet or call the company’s head office to find out the name and title of the person who deals with sponsorship and ask to speak with him or her. This is usually a Recruiting or Human Resources person. It is a good idea to plan beforehand what you will say during this first phone call.

2. Send sponsorship package

Following the phone conversation, send out the sponsorship package as soon as you can so that your contact does not forget about you. Consider enclosing a short cover letter that makes reference to your phone conversation (“following our phone conversation on September 15, I am sending you a sponsorship package for [name of initiative here]”). If you have a contact within the company, mention this again in the cover letter (“Mike Smith, Vice President of [company name here] thought that this initiative might be of particular interest to you because...”) and potentially CC this person on the letter. The cover letter should be personalized in some way as well. For instance, if the company recruits at your university, you may wish to add a few sentences such as “Our chapter believes that this event might be of particular interest to [company name] because many [university name here] students will be in attendance at the event. This will be a wonderful opportunity to spread your name to potential employees and show them that your company believes

in supporting socially responsible initiatives such as ours.”

3. Follow up again after the sponsorship package

Estimate how long the package will take to arrive at the company. Two or three days after you think it will arrive, phone your contact to make sure that they have received the package and ask if they have any questions at this time. Likely they will not have yet looked at the package but this will help to refresh their memory and remind them about your initiative. Ask them if they would like you to call back in a week’s time to answer any questions and mention that you would be happy to meet with them in person to go over some details if they wish. You will likely keep phoning back and forth until you obtain a yes or a no answer.

4. Follow up calls

When a company is interested in sponsoring an event, they will likely ask you some tough questions to make sure that it is truly worthwhile (e.g. What will be the long term benefits of the initiative? How will we as a com-

pany benefit from sponsoring this initiative? Are there ways for our employees to offer non-financial support to the cause?) Anticipate these questions and have answers for them already prepared. You won’t be able to anticipate every question, but thinking ahead will help you to more easily answer unexpected questions. Also be prepared to provide additional information regarding the initiative.

5. Giving a presentation

If you are requesting funding for a big initiative, such as a conference or a project, you may need to create a PowerPoint presentation to deliver to people within the company. You will want to practice the presentation and become very comfortable with it. Dress appropriately for the presentation and remember at all times why this initiative is so important. As long as you are convinced that it is a worthy cause then you will be able to convince the company of the same thing. For advice and suggestions on sponsorship presentations, you may wish to contact the ESW-HQ.

10.4 Managing Sponsors and Funds

Sponsor Responses

When a Sponsor Says YES

The first thing to do when a company agrees to sponsor your initiative is to send a formal letter thanking them for their kind support. The chapter should also keep a copy of this letter. Through the chapter's correspondence with the company, the terms and restrictions of the funding (i.e., if the funding is for a specific project or event) should be clearly outlined for the chapter. Any benefits that a corporation receives (e.g., use of company name or logo on materials) should also be clearly stated. All correspondence should be documented, whether it is a formal letter or an email.

When a Sponsor Says NO

It is important to maintain a friendly relationship with any individual or company that you have approached for sponsorship; even if they don't sponsor you the first time you approach them, they may sponsor you in the future. Companies and corporations are approached by too many organizations to say yes to all of them; don't take it personally but

rather learn from the experience. If possible, ask why you did not obtain funding: had they already allocated their budget to other causes, do they focus on other types of initiatives, or was it for some other reason? Learn from their feedback. Always write them a final letter thanking them for their time and consideration of your funding request and say that you hope that they might become involved in one of your initiatives in the future.

Fund Management 101

When you raise funds from small fundraisers or individual donations, they may not expect much back, but you want to make sure you're spending their money wisely. Grants and corporate sponsorships generally come with strings, and generally the strings are related to reporting - the organization that gave you the money will want to know how you spent it, and whether those expenditures were in line with their program goals. Managing funds for the chapter and several projects requires a good bookkeeping system to track where money is spent - often more than a basic

student org system or bank account can provide.

A specific spreadsheet page for each project is a good start, and if your chapter is regularly handling grants you should talk to your faculty adviser about getting assistance from the university on more advanced accounting help. You will also want to be diligent in tracking major project milestones for intermediate or final reports - and never forget to take some pictures. Anyone who gives out grants will be able to use the pictures in their own promotional material, and you might find your work being promoted simply because you did a good job of visually documenting it. Expect to turn in a final report documenting total spending, project outcomes, and any measurable impacts.