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DON'T TAKE GRANTS FOR GRANTED



Money Talks is OCIC's take on innovative solutions for common funding challenges faced by international cooperation organizations.

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Ken Wyman, CFRE

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Helpful Proposal Writing Toolkit

DON'T TAKE GRANTS FOR GRANTED



by Ken Wyman, 🍠 Follow @KenWyman ABOUT KEN

Grants make up most of the budget for many Non-Profit Organizations (NGOs). However, relying on a single grant to finance your organization can put you at risk because too large a portion of your funding comes from a single source, which might not renew their or your grant. This article will help you find other grants, and others in this series will help you develop a strategy to find revenue from major donors and the wider public. If you are having trouble getting or receiving grants, this article will help you find grantors and learn how to connect effectively with governments, foundations, corporations, and other less well-known grantors.

THIS ISSUE OF MONEY TALKS OFFERS THREE WAYS TO PUSH YOUR **ODDS WELL ABOVE AVERAGE BY:**

- 1. LEARNING HOW TO TARGET THE FUNDERS MOST COMPATIBLE WITH YOUR NGO
- 2. LEARNING HOW TO CULTIVATE PROFESSIONAL RELATIONSHIPS WITH FUNDERS
- 3. ORGANIZING YOUR EFFORTS FOR EFFICIENCY

"Few tasks are faced with such dread as writing and submitting grant proposals..." Because you may never know why you do or don't get funded, it's common to look at grant funding as an irrational or chaotic process, and at grant makers as cruel or fickle. Grantseeking and grantmaking are understandable and fairly rational processes."- Larissa Golden Brown and Martin John Brown wrote in Demystifying Grant Seeking (Jossey-Bass).

HOW TO FIND ESSENTIAL INFORMATION **GRANT WRITING**

WHAT GOES INTO WINNING **PROPOSALS**

GRANT KEEPING

HOW TO MAINTAIN SUSTAINABLE RELATIONSHIPS FOR THE LONG TERM

Myth: All you need is one good proposal and then you can just search and replace one funder's name with another.

Truth: Winning grants depends on pinpointing matches, and tailoring proposals. Although all applications have similar elements, the wording must be custom fit.



Grant Seeking: Where to Find Essential Information

Who gives grants? When asked to name the sources of grants, most people think of the three biggest types: Governments (at all levels), Foundations, and Corporations. While these are all important, you may be missing many other sources of grants, including:



Service Clubs such as Rotary, Kiwanis, and fifty more;

Other charities that fund charities;

Religious groups, whether your organization is secular, or linked to faith groups;

Employee Funds within companies, often created by staff who support good causes with their own

money, and sometimes matched by their employer;

Unions, which fund a variety of social justice causes globally;

Professional groups, such as teachers, doctors, nurses and others with shared values; and Seniors' and retirees' associations.



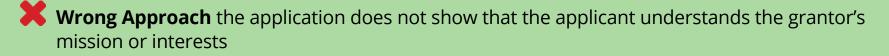
SEVEN ROOKIE MISTAKES TO GRANT WRITING

Funders say that two-thirds of grant applications should never have been sent to them. They are pitched out without more than a glance, because of SEVEN ROOKIE MISTAKES. Most of these could be avoided with proper research before writing and submitting the proposal.





Wrong Project the grantor does not fund projects in this part of the world, or only agriculture, or women's organizations



Wrong Timing the appeal arrives when the funds have all been spent

X Wrong Amount asking for too much or too little; not the amount they usually give

X Wrong Address it does not arrive at all, or goes to the wrong department and is lost, or turned down because the right people never see it

Wrong Name or Title outdated information makes the non-profit look amateurish



What do you think about grant writing? Share your thoughts using the hashtag #MoneyTalks via Twitter | @ocictweets | Facebook | @LikeOCIC

HOW TO FIND THE RIGHT INFORMATION?

Let's start with where to look, and then focus on what information to look for.

Directories listing funders and a lot of background information is readily available. Often the companies that collect and sell this data charge fees up to thousands of dollars a year. However, most directories offer a free tour, which will allow you to download at least a little of the useful information. Imagine Canada's Grant Connect is available for free in many public libraries and college campuses. The directories all have more or less the same information, so the decision on which one you select is more about the user-interface, and which you find easiest to search and understand.

In addition, there are a few specialized services that are lower priority for NGOs because they primarily list grants for businesses, however you may find material there not included in the others. These include:

THE MAIN FEE-FOR-SERVICE GRANT DIRECTORIES ARE:

www.grantcanada.com http://www.cnbd.ca Fundtracker Pro www.Ajah.ca www.BigDataBase.ca www.CharityCan.ca www.FoundationSearch.ca www.imaginecanada.ca/Grant-Connect www.iWave.com www.nozasearch.com

#KenSays... One secret is to slice and dice your project to pick out the aspects that appeal to different funders. For example, a single project may appeal to funders whose primary interest is women, youth, arts, sports, food, education, health, literacy, multi-culturalism, Francophonie, and more.

HOW TO SEARCH FOR THE RIGHT DONOR

Directories may be organized differently. Most allow you to search by keywords, such as art, health, or child. **Think about other organizations with similar work or interests.** Looking up the name of other NGOs in a directory, or on the organization's own website, usually gives a long list of their funders. You might be able to apply to the same grantors.

FOR EXAMPLE:

To find donors interested in ambulance bicycles in Malawi, you could search for donors to Medecins Sans Frontieres, Plan International, and Engineers Without Borders.

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Myth: Writing proposals is an ordeal, involving staying up all night, agonizing about words and figures, ill-prepared to answer the funder's questions, printing a document that reeks of desperation, racing the envelope by FedEx at the last second.

Truth: Writing proposals is predictable and simple. You are responding to questions you can know long in advance, and usually quite similar for all the funders.

WHAT TO SEARCH FOR DONORS

Use up-to-date information in regards to names, places, and dates. When you do your research, track when the information was last up dated. Personnel can change too. If possible,check with the funder directly.

HOW TO REACH FUNDERS

Contact information / Coordinates:



Correct Name for the Organization



Mailing Address, Including Postal Code



Courier Address, if Different than Mailing Address Note: Couriers can't deliver to a post office box. Add the buzzer number for high-security locations, or apartments



Phone Number

Note: Couriers often want a phone number to facilitate delivery

Email Address

URL Address

Social Media Feeds to Follow



Myth: Grants are something for nothing. Too many organizations apply for grants at the last minute, without proper preparation. They do not value the skills or time of grant writers. You may hear them say grants are like Manna from heaven or winning the lottery.

Truth: Grants are rational deals between colleagues. Funders have their own missions and goals. They give grants that fit their interests. The grant researcher works hard to find the right partners, who will recognize that the NGO programs have value that equals the grant money.



DON'T FORGET TO CHECK OUT THE PROPOSAL WRITING TOOLKIT AT THE END OF THIS ISSUE.

'PEOPLE GIVE TO PEOPLE' - FIND WHO MATTERS TO YOU?

There is an old saying in fundraising: "**PEOPLE GIVE TO PEOPLE**". Government does not give away money, civil servants do. Foundations do not give grants, the grant committee does. Corporations don't, employees or business owners do. Clubs, places of worship, unions, all decisions are based on a few members.

USEFUL DEFINITIONS

Find the specific name of the key contact within the granting organization, and several other people who may be involved too. Avoid writing "To whom it may concern," if possible, although small foundations in particular may be very secretive.



GRANT STAFF This person may be called a grants officer or community liaison. Usually this is the person to whom you

send the appeal, if there are no contacts. For routine applications that fit in with publically announced criteria, this may be the only name you need. However, if you want to bend the rules, you may need a person of influence.



WHO'S IN CHARGE Note the name of the top people in the granting organization as well. This could be the president of the company, or the chair of the foundation, or the cabinet minister for a government funder, or the Grand Pooh-Bah of a service club, or the Minister/Priest/Rabbi/Imam/Mother Superior etc. in a place of



LOCAL LEADERS It also helps to have local support outside the head office. Grantors may expect you to build up a relationship at lower levels, and turn to them to ask about your reputation. This could include the senior local representative, such as a local corporate manager or franchisee, or a regional Pooh-Bah of a club, or your local MP, MPP, or city councillor.



GATE KEEPERS Get the names of the people who answer the phone, and greet guests at the office door, too. You can go along way by knowing the name of the person who decides whether you get an appointment or even a phone call. They have a lot of power. Too many people see them as barriers and treat them like dirt. They may no longer be called secretaries or receptionists; instead ask about the key person's assistant, such as the Executive Assistant to the Vice-President in charge of the Thunder Bay factory, or the constituency assistant for the elected representative.



SUPREME LEADERS The more unusual your request, the more you also need the names of the leadership. This might include the members of the board of directors of a foundation or corporation, elected representatives, and other contacts in high places. They can be very helpful in pleading your case behind closed doors.



AVOID THE PUBLIC RELATIONS DEPARTMENT Unless your research shows that the PR team decides on the grants, they are not usually the best division to approach. Their job is to think about what improves their organization's image the most for the least expenditure. That is not usually a grant to an NGO. They may say 'no' so sweetly you think they said 'yes'.

In most Canadian banks, for example: Branch managers have authority to give \$500 to \$2,000; Regional managers can grant up to \$5,000; National staff can approve up to \$50,000; The grants committee decides up to \$1,000,000;



The CEO and Board of Directors considers grants of \$1,000,000 or more

WHAT NEWS ABOUT THE FUNDER BOLSTERS YOUR APPROACH?

Look for news stories about the key person and the funder, relevant to the NGO's issues if possible. Have they made statements about the economy, environment, technology, or global issues? This helps to find common interests and shared vocabulary when writing the grant. More about this below. When a government considers new policies, make connections at the brainstorming phase. When a foundation's investments are doing well in the stock market, they may consider more grants, but when the market is down they may cut their funding.

TELL A FUNDER WHY THEY SHOULD SUPPORT YOUR WORK?

Always find ways to have your proposal stand out. Look for information such as whether the funder supported you or others NGOs in the past. If so, how much did they give? How often?

NGOs are not always the best at record keeping. Funders are often better. In one embarrassing incident, I accompanied the fundraiser from a well-known, venerable NGO to meet a corporate donation officer. We said this was the first time we were asking them for support. The donation officer pulled out application files from the NGO dating back to the Sixties that we knew nothing about!

HAS THERE BEEN SUPPORT BY OTHER BRANCHES?

Funding for your group or similar groups from a funder's other regional offices increases your chances of getting a grant. For example, tell the Rotary Club of Thunder Bay about a project similar to yours funded by a Rotary Club in Timmins, Vancouver or Johannesburg.

HOW MUCH MIGHT THEY GIVE?

If research directories and the funder's own website or guidelines do not say how much the funder might give, check other NGOs' websites for lists of donors, often grouped as bronze, silver, or gold level supporters.

What is their normal grant range? How much have they given similar groups?

If they say they usually give \$2,500 to \$5,000, don't ask for \$1,000, or \$10,000. If your project is better and bigger, you might ask for more than the average. If not, ask for less than the average the first time.

Do they give gifts **in kind** such as products a company makes, or services they sell, or volunteer time? For example, many food and drug companies give goods. Airlines may ship supplies. Employees, members, and students might be asked to help package supplies for disaster relief or assist in construction.

IS THERE A CONNECTION TO THE PROJECT?

Asking for funds for a specific project is more likely to get you a grant than asking for unrestricted funds. Emphasize the outcomes it will produce for the people helped. Funders don't give you \$5,000 because it is the average amount they give, or to hire a nutrition team, but they do give because it sets up a project that feeds 100 kids for a month. **(See the previous Money Talks on the Case for Support for more information.)**

Why would this funder care about this project? Are they involved with food or health, children or seniors, sports or transport? Are you helping people of the same faith?

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HOW TO REACH YOUR APPLICATION DEADLINE

Apply six to ten weeks ahead of any deadlines they have published. Avoid being another one rushing at the last minute. Allow time for the funder to ask you for more information.

The larger the amount you request as a proportion of the donor's total budget, the more important it is to submit well in advance, while they are still in the planning stage. Often a funder's entire giving budget is fully committed by the start of their fiscal year. Another, applying for a grant from Canada Post rushed it at great cost by FedEx. However Canada Post owns Purolator couriers, and refused to accept a package delivered by their rival. It was returned, but the deadline had passed.

If the funder accepts applications year-round, apply six to ten weeks before the start of their new fiscal year. This is the time when they decide the largest gifts, and also when they give out any leftover funds for the year-end.

Beware of last minute submission. One NGO sent a staff person to hand in their proposal in person. Arriving an hour before the deadline, she discovered a long line of other applicants ahead of her. A clerk slowly accepted each, and rubberstamped it with the date and time. Unfortunately, by the time she got to the head of the line, the deadline had passed and her proposal was not



HOW LONG DO THEIR GRANTS LAST?

Is their support limited to one year, up to five years, or indefinite? Will they allow repeat grant applications? If so, can you reapply every year, or do you have to wait for a year, two, or more between applications?

If they don't lay this out clearly, check who else they fund, and how frequently.

HOW DO THEY WANT APPLICATIONS SUBMITTED?

Do they have strict rules about length (word count, or number of pages)? Format? (Some insist on margins of a certain width, or that the pages be stapled or not stapled.) Do they require specific information? (Budget, outcome evaluations, etc.) Do they want you to send one copy, or 13?

Be sure to follow the rules precisely. Don't have all your hard work rejected on a technicality.

If possible, ask for a meeting with the grants officer weeks or months before the deadline. Most do not have time to meet, but a few do. Having a conversation where you listen carefully can improve your proposal. They may also remember the people they meet, and read your proposal more carefully. If possible, take an influential person, such as a donor, business leader, union member, or clergy person with you to meet the donor, but make sure it is the right person to leave a positive impression.

What ideas or phrases would capture their interest? Mirror their style. Check their website, annual report, ads, news coverage, speeches by CEOs or elected officials, or products as applicable. For example, if they wave the flag in their marketing materials, emphasize that you are a Canadian NGO, but if they focus on being global, mention your international reach.



Myth: Funders have all the power and money; non-profits have to be beggars. Many NGOs see themselves as poor (and proud of it), martyrs for good causes, fighting for justice and recognition. They see the grant-makers as decision-makers with all the power, who operate in exclusive enclaves, with unlisted numbers, who refuse to meet with the suppliants. They see grant-makers as either noble or evil, but not equal partners in a movement to fix the world.

Truth: Funders need charities, with good projects. Funders want to give away their money, wisely. Foundations in Canada, sitting on big endowments, are required by law to give away at least 3.5% of their principle investments every year. However, corporations and government are not required to give anything away. But funders are not inspired by your incredible need, devotion, or suffering for the cause. They want to make good decisions, just like shoppers overwhelmed in the supermarket. Your grant proposal is the packaging, clearly showing the ingredients so they can select the best.

WHAT RECOGNITION OR BENEFITS DOES THE FUNDER WANT?

Check their giving criteria. This may be in the research databases, on their website, available on request, or implicit in the recognition other NGOs have given them. Some funders clearly spell out that they want to see their name on your website and on signs on the ground. Others are less specific but arrange news coverage, perhaps by having their CEO visit a project with a camera crew. Others are happy to be anonymous. **Where can you get internal project and proposal information from your NGO?** Now that you have gathered all the information about the funders, gather information about your own NGO and the project. This will be essential for writing your proposal.

Remind yourself what is the purpose of the grant? Specific project grants get funded more easily than unrestricted requests. Matching the right project with the right funder for the right amount at the right time is hard work. You have to answer the funder's deceptively simple question: "What's the Money For?

The project **MUST** be created before questions in the grant proposal can be answered. This is done by the project or program staff not, the fundraiser (unless your NGO is so small that you are one and the same person). Although the fundraiser cannot invent the project, the fundraiser/ grant writer can point out which projects are fundable, request essential information, and help explain the project in terms that make it more likely to be funded. You can polish the program staff's words, but don't change (or makeup) the facts!

Never invent new projects on your own without project staff. If you get the money, the NGO may not be ready to implement it, could have trouble following through, and may have to return the money. This is so serious a problem that some funders now require that grant applications include a signed copy of a resolution from the

Beware of drifting into **"mission creep"** where your projects are invented based solely on what funders will fund. Funders rarely give 100 per cent of the needed funding, so it will eat into other resources. Even if they do, once their funding ends, you may end up with an ongoing project that is hard to support continuously.

What are your budgets? How much is the minimum required to run this project? If you could get more than that, what would it achieve? What is the budget for the whole organization? Include line-item details, as well as a contingency for unexpected costs, and a share of the operating costs. Many funders will set a limit of ten to twenty percent of the project for 'overhead' costs. Don't inflate your figures; they've seen hundreds of other budgets and can detect padded budgets easily. They may also want your audited statements.

What is the timeline? When does the project have to start? If this is affected by external factors such as the rainy season, school year, urgent response to a disaster, or migratory animals, let the funder know. How long will it take you to get started after they send the cheque? How long will it be before you have results? Will this project end when a specific task is accomplished (for example a hospital is built) or continue for the long-term (such as operating the hospital)?

What is the evidence that this project is needed? Do you have studies by academics, or news coverage, or endorsement from influential people? Do local people agree that it is important? **Myth:** You need to know someone to get a grant. If you are not connected you are out of luck.

Truth: Even with friends in high places, your program must still match the funder's goals. Wedding Crashers are NOT popular. You don't need to a connection on the inside to ask for funding if your projects are good.

Relationships with funders can be built as you go. These are professional relationships built on confidence and trust. Your track-record counts. If they don't know your organization, the funder may have confidence in the people who support you, through serving on your board or advisory panel, and/or donating, and/or endorsing you. The better grantmakers know the NGO or a person involved the more they will trust you as a steward of their funds/mission.

How many people will this help? Put the budget in terms of the cost per person helped. Gather stories about the people, so the funders feel an emotional pull to help, as well as a rational understanding of the importance of your project.

Who is involved on your team? Prepare short bios of the people who will do the work in the field, the head office team, and your board of directors. Impress the funders with the experience and credentials of those in charge.



DON'T FORGET TO CHECK OUT THE PROPOSAL WRITING TOOLKIT AT THE END OF THIS ISSUE.



Customize every grant request. Generic grant applications do not work well. Each one must be specially written. You can only do a few that way — but you'll get more money.

Sending the same package or a "cut and paste" form letter to many funders is a waste. Granters can tell. They feel just as special as you do when you get a letter from Publisher's Clearing House or a hiring committee who get a photocopied job application. Worst of all are the sloppy "search and replace" documents where a reference to a different funder is left behind.

In particular, the cover letter should vary a lot for each funder. Point out how this program matches the funder's mission. Mirror their language. Make it timely and relevant.

"Common Grant Application" forms are slowly catching on. They allow you to apply to several funders at once, with the same information. In every other case, the application can be assembled from common elements but must be unique to the funder.



NO ERRORS:

Many grants are turned down because of preventable errors. Absolutely no spell ink miss steaks, type O's, or pubic Eros that your computer's spelling checker won't find. Also watch for budgets that don't add up, or figures that should be the same in different sections but were not updated. Grantors are often number-crunchers who do math well.

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GRANT KEEPING: HOW TO MAINTAIN SUSTAINABLE RELATIONSHIPS FOR THE LONG-TERM

If you get the grant, thank the funder. Thank the grants officer who did the hard work. Thank the funder's board and staff too. A hand-written card or a simple letter will set you above others. This could come from your board or others who will impress the donor.

If you don't know whether you've received the grant or not, three months after their deadline it is appropriate to send a short note to ask if they need more information, and when you might expect to hear their decision. Many grant-makers are over-whelmed with proposals and cannot respond to everyone who applies.

If you receive a rejection letter, read it carefully for clues. Review the funder's guidelines to see what you might have done wrong. Send the funder a hand-written card or a short letter thanking them for considering your application; few NGOs do this, and it may make them more open to your next appeal. You can ask if they would give you feedback on your proposal, perhaps over coffee, on the phone, or in a note, but don't be surprised if they do not have time to respond. Many funders are under-staffed, and some are run entirely by volunteers. They have enough work figuring out how to give away the money wisely; teaching you how to apply is not part of their job.

Funders expect reports on your projects. Some make this a contractual requirement, some are less explicit. Yet many funders complain that they have to pull teeth to find out if their money was spent, and what were the outcomes.

Failing to report makes it unlikely your NGO will get funding from this grantor in future. It may even poison the well, turning them off all international projects. Once you get confirmation that your grant proposal has been approved, get to work implementing a stewardship process. Thank the funder before you cash the cheque. Send them a note letting them know if you now have all the funds in place to begin work, or are still waiting to hear from other funders. Let them know the date you expect to get to work. Ask them what reports they expect from you.

Get to know your grants-officer as a person. Address them by name. Find out their interests (LinkedIn, Google, and social media have made this easier than ever). Invite them to your NGO's events. This is not stalking them or exerting undue influence, just building a mutual relationship of trust. On the first day of the project, send a short note to let them know their money has been put to work. Send reports every three months (unless they tell you not to do so) explaining what you have done so far, and how it is working. Send a report before their fiscal year end, so the donations officer can report back to the funding committee or board on progress. Send a report at the end of the project year. This includes a reconciliation of plans and realities. Compare actions and expenses to expectations. Send your NGOs overall annual report, too. Show them how this project fits into your overall work.

Reporting a failure is better than failing to report. Funders know you are working under difficult circumstances. They understand that not every project turns out as expected. But disappearing from their radar just alarms them. Send a report documenting what you tried, and showing what you learned. Help them avoid funding others who are in danger of making the same mistakes. This might even open them up to funding your new and improved project.

Set-up a system for year-round grant work.

Don't be a rabbit, leaping into action when a deadline is approaching. It will be less work if you approach the process consistently. Grant writing has a learning curve. Set up a calendar showing due dates long in advance. Include dates for reports on existing projects. Set reminders for each several weeks in advance.

Invest in research before writing. You need to spend time finding out what the funders want, reading directories and grant guidelines, and reviewing funders' websites. You may need to ask the funder for additional information and wait for their response. Gather internal information from your NGO long before the deadlines when you write the proposal. This includes details on projects, budgets, and the board, staff, and volunteers. With each repetition, the tasks become easier and faster.



Myth: Grants are gambling.You can knock out a proposal by pulling an all-nighter, send it out to a long list (called "spray and pray") and if you're lucky, get the big bucks.

Truth: Grants are work. Large grants can take over a year to prepare and receive. GAC is focusing on fewer NGOs. Governments have de-funded many NGOs. Fewer non-government funders are accepting unsolicited applications. If you don't have a solid proposal, your application will almost always be rejected.



The ideal proposal package contains:

Cover letter Title Page Table of Contents Summary Introduction Problem/Need Project Goal Methods Outcomes/Evaluation Recognition/Benefits Future Funds Budget(s) Appendices

TO ACCESS THE PROPOSAL TOOLKIT VISIT WWW.OCIC.ON.CA/MONEYTALKS OR CLICK HERE

ABOUT KEN WYMAN:

Professor Ken Wyman, CFRE teaches in the Fundraising Management graduate program and the International Development graduate program at Humber College, and has taught at several other colleges and universities. His fundraising career began with five years as National Coordinator of Fund Raising and Publicity for OXFAM-Canada where he led a campaign that reversed a seven-year decline in income, and tripled public donations. Earlier, as a journalist and photographer, Ken filed news and human-interest stories from across Canada, Europe, South America and the Middle East. He has reported for The Globe and Mail, The Toronto Star, The Financial Post, As It Happens, and CBC National News, among others.

Ken has been a Certified Fundraising Executive (CFRE) for over 25 years. This international professional designation requires passing a rigorous exam and re-certification based on current practice every three years. His research sabbatical in 2012-13 focused on the challenges charities face when they speak out as advocates for social change. A popular trainer and consultant, he has lead conferences and workshops across Canada and the US, and in Cuba, Sweden, Austria, England, and Holland. Ken has been called "one of the world's best fundraisers."

Ken has written or contributed to eight books on fundraising. His most recent was the lead chapter on planning for fundraising for *Excellence in Fundraising in Canada*, which reached #3 on the Globe and Mail business book list. His other books include:

- Face to Face: How to Get Bigger Donations from Very Generous People (F)
- Fund Raising Ideas That Work for Grass Roots Groups (F)
- The Guide to Special Events Fund Raising (F)
- Everything You Need to Know to Get Started in Direct Mail Fund Raising (F)
- Planning Successful Fund Raising Programs, published by Imagine Canada

• Fundraising for Non-Profit Groups, with Joyce Young and John Swaigen, published by Self Counsel Press (F) Livres diponsible aussi en français.

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The Ontario Council for International Cooperation (OCIC) is an expanding community of Ontario-based international development and global education and individual associate members working globally for social justice.

As a Council, OCIC strives to increase the effectiveness and collective impact of all our members' efforts to promote sustainable, people-centred development in a peaceful and healthy environment. OCIC is committed to principles of fair and equitable cooperative international development and promotes public engagement that helps Canadians develop a global perspective and take action for social justice.

