



Fundraising Strategies to Help You and Your Students Beat the Recession



Successful Strategies for Fundraising

Sergei Shirobokov,
Educational Adviser and Director
Omsk Advising Center
sshirob@omgpu.ru

www.omgpu.ru

Omsk State Pedagogical University

Omsk Advising Center



Omsk State Pedagogical University
75+ year history
(founded in 1932)

1994 - Education abroad programs
and international cooperation
activities

1999 - Inter-University Center for
International Cooperation and
Academic Mobility, Ministry of Education
and Science of the Russian Federation





Omsk Advising Center

The structure of 3 elements

Study Abroad Office

TOEFL iBT Center

Library

We advise anyone interested in:

**studying, researching, gathering materials
for a dissertation or thesis, receiving in-service
training abroad or experiencing American political,
business and community life.**



Areas of Operation

Arrange or support organization of:

FLEX

Omsk State Pedagogical University becomes an institution to conduct FLEX

UGRAD

MUSKIE

Our Center advises about preparing a successful application and collects application documents

Fulbright

Our Center:

- attracts prospective participants to the programs
- participates in alumni programs and conferences
- hosts Fulbright Specialists



Areas of Operation

official *CEU local representative*
in Siberian region recruitment activities:

- ◆ advising
- ◆ arrangement of CEU Administrated examinations:
 - institutional TOEFL, LSAT
 - Mathematics for the relevant departments
 - Test of Writing Ability
- + arrange conferences, forums, lectures and presentations
- + various outreach activities





How can an Advising Center
receive funds or donations
to pursue its mission?



FUNDRAISING



Omsk Advising Center Experience

Source of funding	Funding Received For
Local government	Salary, publications
Omsk State Pedagogical University	Salary, supplies, equipment
International students (5% of tuition fee paid by each international student)	Supplies, business trips
TOEFL iBT	Supplies
Student Tourist Agency "Startravel"	Newsletter on studying abroad
Grants (Annual CEU grant, US Embassy grants)	Salary, supplies, business trips, other materials



Omsk Advising Center Experience

in 2008 our Advising Center was awarded
Small Grant of the US Embassy in Moscow.

We won this grant only because we managed to create a **comprehensive strategy** for approaching the donor and develop a **reliable plan** of action.

Except those tips for successful fundraising we usually employ **project methodology** and **logical framework approach**.



Logical Framework Approach



- 1. Develop a strategic plan of our activities including:**
 - project objectives and specific aims
 - stages of implementation and anticipated results
- 2. Analyze prospective partners/funders, their interests, possibilities and challenges for cooperation.**

This allows us to:

- identify potential partners
- determine the relevance of project to their work
- foresee possible challenges
- develop a strategy of raising funds and minimize that possible negative effect



Logical Framework Approach



Organization	Interests and expectations	Influence on the project	Recommendations for getting support and minimizing negative effects
1.		<ul style="list-style-type: none">•very significant•rather significant•not very significant	



Logical Framework Approach



3. We **send information letters** via e-mail, fax or even regular mail to potential funders.
4. We **attract mass media** and advertise our prospective donors within the announcement about our activity.
5. We **lobby** our interests.
6. We **immediately thank** our donor organization for its kind **assistance** with a thank you letter.





This is how we operate locally.

However, there is no one universal funding strategy that will work for all EducationUSA Centres.

Pair these guidelines with your own research on effective fundraising.



Think Globally

Act Locally



Best Practices: Fundraising for EducationUSA Advising Centers

Lauren Welch

Head of Advising

US-UK Fulbright Commission - EducationUSA

lwelch@fulbright.co.uk

www.fulbright.co.uk



Overview

- Host institution: Fulbright Commission
- Organizational funding as of 2006-07:
 - US government grant + in-kind contribution via IIE
 - UK government
- Grants have been static, as the US-UK relationship is less of a strategic priority for both governments
- Static grants + increasing cost of higher education in US/UK = fewer funds for Fulbright awards
- Pressure from our Board to justify advising's usefulness to Fulbright as a host institution and to fund ourselves



Challenges

- 1. I was hired as an advisor!**
- 2. Our mission as an EducationUSA center to provide accessible advice and resources to students**
- 3. Our not wishing to endorse any university, product or service**
- 4. Limited staff time to fundraise, with three staff members vs. 8,700 UK students in the US at any given time and 6,000+ center contacts in-person, by phone or email each year (plus another 6,000+ visitors to the Study in the US section of the website each month)**
- 5. Did I mention I was hired as an advisor...**



Possible Funding Sources

- Students: Paid advising services
- US universities and educational service providers
- Contradeals for attendance at fairs and university talks
- Grants from ECA and PAS



Opportunities: Paid Advising Services

- **We are offering a valuable advising service to students - for which some UK students/families pay educational consultants hundreds of pounds**
- **Concerns: What would happen if we charged students?**
 - Would this put them off applying for US study or prevent them from getting information on the topic?
 - Would it exclude students from low-income backgrounds?
 - How would this fit in with the mission of EducationUSA to provide accessible information?
- **Test piloted charging 10 pounds (\$15) per person for our two-hour seminars on undergraduate and graduate study in the US**



Paid Advising Services

- **Would this put them off applying for US study or prevent them from getting information on the topic?** It has not so far as we can tell. US study has gained popularity in the UK over the last three years. In fact, attendance at events has gone up. If you pay, you show up!
- **Would it exclude students from low-income backgrounds?** We put a note on the website that if the cost was prohibitive we would waive it on request. Only one person has asked thus far. We also offer a free seminar for an organization advising low-income students.
- **How would this fit in with the mission of EducationUSA to provide accessible information?** We discussed with our REAC. The website contains full, free and accessible information. The difference is that the seminar offers students a way to receive this information in a different (easier to digest) format.



Additional Ideas: Paid Advising Services

- **Membership to your center**
- **Individual advising appointments**
- **Application or essay review**
- **Advisor training**
- **Test preparation courses**
- **Print publications on US study**



Tips for Success: Students

- Provide free, accessible general information on US study.
- If you do charge for individualized services or the convenience of a live seminar, select reasonable prices that are not cost-prohibitive but enough to encourage attendance.
- Provide an option for those unable to pay for your services and communicate this openly.
- Explain why you are charging students - we tell them we operate on a cost recovery system. All income goes toward hiring a venue for the event and the advising center.
- Trial paid-for services before committing to them.



US Universities and Educational Service Providers

- **As advisors, we are in a unique position to assist US universities interested in recruiting students locally.**
- **For educational service providers, we can offer them promotional opportunities to students using our center.**
- **Promotional opportunities in the UK:**
 - For both: Attendance at our USA College Day fair
 - For educational service providers: Leaflets to library visitors and event attendees, as well as print resources listing
 - Speaking at seminars or information sessions
 - Listing or banner advertising on our websites
 - Emails to our student database
 - Sponsorship of events



Concerns

- **Would charging US universities to attend College Day prevent them from recruiting in the UK?**
Some university organize their own school visits or pay several thousand pounds to attend other UK fairs. However, USA College Day offers them a way to connect with 3,000 attendees in one day with little local knowledge or travel planning for \$450.
- **How would this fit in with our aim to not endorse any university, service or product?**
Each promotional item/opportunity explicitly states that we do not endorse and university, service or product.
- **Is there value for students?**
In the UK, yes! We do not have the staff to offer specialized services such as test preparation classes, but we can put them in touch with those who do.
- **How do you ensure you have credible partners?**
Meet with potential partners. Do a full investigation. Ask for references. Set policies to safeguard yourself. For example, at College Day US university exhibitors must be accredited and represented by a staff member, student or alumnus (no agents).



Additional Ideas

- **DVCs / webinars**
- **Speaking opportunities at events**
- **Market research / surveys to your students**
- **Consulting on recruiting locally or forming study abroad partnerships**
- **Cross-promotion or shared promotional costs**



Tips for Success

- Develop standard rates that are appropriate for US universities and for profit-making educational service providers (higher).
- Communicate value in terms of their marketing/recruitment goals, using language and tone that matches theirs
 - What is their return on investment (ROI) - number and type of event attendees, website statistics, quality of interaction, etc.?
 - What language do they use? Clients? Products?
- Adjust your rates according to ROI.
- Explain why you are charging for your services - Again, all of our income goes toward the advising center and our promotional activities, which in turn means more promotion for them.
- Protect yourself against undesirable partners.



Contradeals

- **No money, no problem!**
- **Forming a contradeal:**
 - How can you be of value to the partner? Promotion? Sharing expertise?
 - How can they be of value to your center or students?
 - Discuss ideas, and type up a relationship framework / agreement.
- **Case studies from the UK**
 - Giving talks at UK universities - in exchange for free advisor training on working with students interested in US study
 - Attendance at student fairs - in exchange for promotion of the fair



Grant Funding

- **Find funders with a vested interest in your work**
- **ECA**
 - Fulbright grant / ECA regional funds
 - Support for professional development
- **Public Affairs Section - promoting America's interest in the world**
- **Scottish government**
 - Creating business / research relationships with the US
 - Creating a competitive workforce locally



Tips for Success

- **Brainstorm a list of activities and funding needs for the year and match these to your funders.**
- **Recipe approach:**
 - Create a recipe of ideas and cost estimates.
 - Discuss your ideas informally with the funder before submitting a proposal.
 - Gives you a chance to get their buy-in, allows them to feel ownership of the projects and will prevent you from proposing projects that are not a good fit.
- **Write the proposal:**
 - Use terminology and tone that fits the funder: Buzzwords and priorities
 - Position yourself as being an extension of their work / mission: They can achieve their goals through you.
 - Explain the need - what would happen if you did not receive funding?
 - Provide a clear, measurable, but conservative picture of the results.



Tips for Success

- **Develop a three-year plan**
 - Crop rotation: If you have a regular project such as outreach, alternate funders each year.
 - Pilot - Expansion/Adaptation - Consolidation:
 - If you have a multi-year project, ask first for funds to test pilot it.
 - After a successful first year, ask for funds to expand or adapt the project to a new audience.
 - The third time, ask for funds to consolidate the project and seek a new funder for subsequent years.
- **Manage the funding responsibly:**
 - Meet deadlines for initial paperwork and final reports
 - Track spending - do not underspend!
 - Keep statistics on the impact
 - Gather quotes/pictures from participants
 - Send an informal mid-point update
 - If issues arise, communicate with your funder



Advising Students Through a Financial Crisis

Nino Chinchaladze
Center for International Education
Tbilisi, Georgia
nino@osgf.ge
www.osgf.ge



Overview

- Funding has long been a concern for EducationUSA center and students.
- The economic recession has intensified the need to provide advice to students on securing funding for US study, as well as to find funding for our center.
- Fundraising is essential, and it is possible even during recession!



Center for International Education

- The Center for International Education (CIE) provides information about study abroad opportunities.
- CIE provides a unique service in Georgia through its central and branch offices in different cities of the country.
- One of our main priorities is to distribute information about scholarship opportunities.



Importance of Funding: Areas of Need

- Administrative / overhead expenses
- Student scholarships



Funding Sources: Overhead Expenses

- State Department
- Open Society Georgia Foundation
- Open Society Institute
- Central European University
- Income generating activities
- Student support with scholarships



Importance of Scholarships

- Student perspective: Scholarship funding is often essential for students to attend study in the US.
- CIE perspective: The availability of funding encourages students to believe US study is a possibility and draws them into the CIE office to find out more.
- US universities' perspective: Recruitment tool for top students and can be used to achieve their own diversity agenda through need-based scholarships or those for international students.



Funding Sources for Study Abroad

- CIE sponsored programs
- ACCELS, IREX, USA Embassy, British Council, DAAD
- Home country Embassies
- President's fund
- Local Government special funds (Ajara case)
- Private Companies
- Local Banks
- And Universities in the US



Advising Georgian Students

- Choosing the appropriate universities with a view to maximizing chances to receive funding and minimizing costs
- Finding and applying to funding sources external to the US university
- Strategies for finding funding once in the US



Case Study: New Host Country Loan Schemes

- Loans from local banks are available, but the interest is so high that very few people apply for it. It is also not possible to take out a loan from a US bank, unless the student is a dual citizen or has a US co-signer.
- In 2008-09, the Ministry of Education and several major banks launched the special loan program called Knowledge Gate.
- Loans have to be paid back in ten years, starting three years after graduation.
- All students with acceptance letters from US universities could apply. About 60 students have received funding Knowledge Gate.



Democracy and Reform Fund

- Development and Reforms Foundation under the President of Georgia (DRF) every year announces a competition for funding for Master's programs abroad.
- Grants are offered for young specialists to cover the costs of study or research (including living expenses and international flights) abroad for academic year.
- Selection is made on a competitive basis.
- Applications may be submitted in any fields, among which the preferences will be given to the following fields:
 - Architecture, Urban Planning and other fields of Civil Engineering
 - Tourism
 - Agriculture
 - Business Education
- In the selection process the priority is given to applicants with co-funding and to civil servants.



Regional Initiatives (AJARA CASE)

- Co-funding opportunity for study abroad:

100,000 Georgian Lari approximately
60,000 USD from local budget



Joint Programs

- Joint OSI –NSP program and Georgian Government Programs
- Georgian education program
- Open Society Institute-Network Scholarship program – Georgian Ministry of Education and Sciences
- Georgian Education Program
- Co-funding MA students
- Field Education Policy and Management
- Students per year at Harvard and Columbia
- After graduation students will get jobs through three-year Ministry appointments.
- The Program in Georgia is administered by the Center for International Education.



Future Plans

- The same program with the Ministry of Health and Social Welfare
- Public Health Program



Establishment of an Educational Foundation: Creating New Scholarship Opportunities for Students

Nina Vranesevic
Project Manager
IDE, Zagreb, Croatia
nvranevic@iro.hr
www.iro.hr



Hot Topic: Funding US Study

- Croatia has more than 11,000 enquiries a year about study opportunities in the US
- 30% of enquiries related to financial aid for study
- Comparatively low economic status vs. high tuition fees and living expenses
- In 2008/09, 617 Croatian students studying in the U.S. – 10 at Harvard University (scholarships available for Croatian students)



Recognizing Students' Needs

- *Fulbright for the Future Scholarship* – the initiative of the American Ambassador to Croatia Robert. E. Bradtke (2007-09)
- US Embassy raised funds from private companies in Croatia to fully support 4 students: Marina Jeger - MBA program, **University of Indiana**, Mislav Mataija - LLM Program, **Columbia Law School NYC**, Dragan Mrkajić, MBA program, **Bentley College**, Iva Ivanišević, LLM program, **Harvard University**
- IDE's initiative: the U.S. Embassy recognized the importance of continuing to offer a **full degree-program scholarship** for study in **fields critical to Croatia's social and economic development**



Grantee Testimonial

Marina (MBA program, 2009, University of Indiana) plans to return to Croatia and continue her work at the Faculty of Economics in Zagreb.

“My wish is to adapt new approaches to teaching that emphasize interactive pedagogy,” she said, “I also plan to contribute to the local community by working with small and medium businesses in Croatia as an expert.”





Croatian American Foundation for Education and Training

- Founded by IDE in
September 2009



Croatian-American
Foundation
for Education
and Training

- Strong partnership between the U.S. Embassy in Zagreb, Croatian Ministry of Science, Education and Sports, and the representatives of the Croatian and American business community



Why the Foundation?



- 10 years as an EducationUSA center
- IDE's *One-stop-shop* concept for information on study opportunities in the USA
- The interest in Foundation's scholarships programs increases the interest in educational advising and standardized testing services at IDE
- Scholarships program adds value to the educational offer in the USA for Croatian students and raises the visibility of USA as study destination



Fellowship for the Future

- The fellowship supports one-year or two-year **Master's degree programs** with a professional orientation
- Intended to support highly competitive Croatian citizens who are in **preparation for assuming leadership roles** in their career field
- **Priority fields:** law; economics; business; journalism; communications; environmental studies; public policy; public administration; public health policy/administration; political science; international relations; security studies; educational policy/administration and agricultural policy/administration, and other
- **Preference** is given to applicants who have not previously studied or lived abroad for an extended period of time
- Applicants **must be planning to return to Croatia** at the end of the period of study in order to effect positive change in Croatia



Fellowship for the Future

- Effective launch of the Foundation and scholarships program in 2009: key note speakers; over 30 journalists from online, print, TV and radio
- Considerable flow of inquiries from prospective candidates (**more than 300 enquiries in 2 months**); increased interest in educational advising and standardized testing services at IDE
- **42 applications received**, candidates for:
MBA (12), LLM (11), Public policy/international affairs (3), Applied psychology (3), Asian studies (2), Cultural management (2), Urban planning (1), Computer science (1), Education policy (1), Architecture (1), Tourism (1), Theology (1), Communications/media (1), Biochemistry (1), Music performance (1)



Fundraising for the Foundation

- US Embassy provided key start-up support for registration and initial operating costs
- Active role of influential Board members and their networking
- Fundraising goal: At least 2 full scholarships for Master's study in the US in 2010

Short-term fund development plan:

- Financial support by the Croatian Ministry of Science, Education and Sports
- Corporate donors - 98 fundraising letters sent out to companies
- High profile fundraising event hosted by the Ambassador Foley
- Cost sharing deals with US universities

Long-term fund development plan:

- Building a broader donor base
- More active and widespread alumni involvement
- Engaging the Croatian diaspora in the US
- Small donation options schemes
- Innovative fundraising events and strategic communication



Future Challenges and Opportunities

- Identifying long-term support for Foundation's operating expenses
- Reaching out to and motivating smaller donors
- Developing online giving mechanisms
- Major gifts
- Forming corporate partnerships
- Tapping into the potential of international grant-making foundations
- Strengthening the culture of giving in Croatia



Long-Term Influence of Foundation

- 1. Raised visibility of US as a study destination with available funding options**
- 2. IDE and the Foundation in policy making initiative**
 - Advocacy initiative for removal of barriers to higher education mobility – lack of appropriate tax exemptions for scholarships in Croatia.
- 3. Tapping into the potential of philanthropy to address educational needs**
 - Building a community of supporters and partners who can considerably contribute to the growth and development agenda by supporting innovative and visible knowledge and skills exchange programs
 - Sustainability: building on the scholarship program to develop an institutional framework which can evolve over time and provide additional channels of knowledge and skills exchange