7

Thriving and Growing

Organizations have life cycles, and they certainly go through growing pains. In this section are a some pointers about how to deal with “midlife crisis,” how to raise money, and how to expand the power and diversity of your group.

Contents:

<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Coalitions in midlife crisis</td>
<td>7–1</td>
</tr>
<tr>
<td>Fundraising</td>
<td>7–5</td>
</tr>
<tr>
<td>Sample product (WalkBoston)</td>
<td>7–20</td>
</tr>
<tr>
<td>Sample fundraising letter (WPC)</td>
<td>7–21</td>
</tr>
<tr>
<td>Proposal checklist and evaluation form</td>
<td>7–22</td>
</tr>
<tr>
<td>Writing grants</td>
<td>7–24</td>
</tr>
<tr>
<td>Sample grant package</td>
<td>7–31</td>
</tr>
<tr>
<td>Power and diversity</td>
<td>7–41</td>
</tr>
<tr>
<td>Fundraising links on the internet</td>
<td>7–54</td>
</tr>
</tbody>
</table>
Coalitions In Mid-Life Crisis

by E. Suzanne Turner

How do coalitions keep up the momentum? The enthusiasm and energy level in every coalition waxes and wanes. Examining and anticipating the potential causes of a slow-down in momentum is part of the growing process necessary for a successful coalition.

"Coalition building and development is not an exact science, so there is no 'silver bullet' solution to growing pains," says Jeffrey Diver, National SAFE KIDS field director. "It's important to consider a variety of causes and a variety of solutions. The trick is to recognize warning signals before major problems occur. Coalition mid-life crises can often be boiled down to one or more of three areas: planning and focus, membership recruitment, and communication with members."

Diver and National Field Organizer Alice Novitsky agree that growing pains have a number of different symptoms. These might include a drop-off in meeting and special events participation, lack of enthusiasm and fresh ideas for project planning and implementation, few new members and an underlying sense of ineffectiveness.

These problems may begin to manifest themselves at any time, but, Novitsky stresses, "Coalitions typically begin to have problems after they've had a few successes. A core group of people has been meeting for a while and there are no new activities or programs. These initially enthusiastic people can no longer devote the same amount of time."

Diver agrees, "The enthusiasm of forming a coalition usually carries the group through its first year. Once activities begin to be repeated, enthusiasm sometimes drops off."

A coalition's "mid-life crisis" might indicate problems that were not addressed or recognized when the group was established. A hard look at the coalition's underlying structure could well ensure that the coalition emerges from...
momentary difficulties stronger than ever before. Even if everything is going well, it's a good idea to ask yourself the following questions every few months.

Is most of the work falling on a few people?

A coalition is, by definition, a group of organizations and individuals working together toward a common goal. Unfortunately, many coalitions suffer because a few people are doing the bulk of the work. This leads to "burn-out" and a shortage of fresh ideas.

**Measurable goals help focus coalition efforts to prevent burn-out and feelings of ineffectiveness.**

In his article "Keys to Coalition Building: Twelve Tips for Success" (Childhood Injury Prevention Quarterly, Spring, 1991) Diver recommends forming a coalition on three levels to ensure productive use of the membership's talents as well as to ensure longevity.

The first level—which might be known as the executive committee, steering committee or board of directors—typically constitutes five to 10 people who work closely with the coalition coordinator to provide leadership on central coalition functions. The second level is usually made up of committees formed around the five major risk areas (traffic hazards, fires and burns, drownings, poisoning/choking and falls) or coalition functions (public policy, media, fundraising, membership, education, data collection and evaluation). The third level is the general membership.

The best guarantee for participation is to structure the coalition according to member interest, stresses Novitsky. Michelle Gibler, coalition coordinator in Columbia, Missouri agrees, "Without each entity doing a job in their special field, the whole group can't pull it off."

**Is it time to update the action plan?**

If your activities aren't meeting with enthusiasm among your membership or in your community, you may need to approach old problems a different way or attack new problems.

"Every team needs an action plan, a document that focuses efforts," says Diver, "without some guidelines you can't see the progress of the coalition and there's little sense of accomplishment. But it's important not to stick to the plan too rigidly. Flexibility is the key."

Diver suggests asking yourself if you are truly meeting the needs of your community and your coalition members year in and year out. For example, if there is a major fire in your community, it may be time to do some work on residential fire detection, even if you're currently implementing a poison prevention strategy. This will keep public attention focused on the coalition and underscore your coalition's responsiveness to emerging problems.

Martha Collar, Oklahoma City Coalition coordinator, visits hospital trauma patients regularly. "It keeps my finger on the real issues that paperwork sometimes keeps me from." Collar recently focused coalition efforts on child sled injuries and dog attacks when hospital visits indicated these were emerging community problems.

Diver stresses that members have a lot to contribute. "Don't develop your plans in isolation," warns Diver. "Including members in the planning gives them a sense of ownership and commitment." A coalition retreat or special meeting may help members focus on the course of the coalition's plans.

**Are activities targeted to conserve coalition energy?**

"Working on everything that comes down the pike will burn your coalition out quickly," says Diver. Your action plan should help you focus attention on those things you feel you can realistically achieve. Be sure to match injury data and community needs to your membership's talents and availability. As Novitsky says, "Time is the greatest enemy of coalitions because the members have limited time, and there are limited meeting times. So, the more focused coalitions are, the more likely they are to get things done."

For example, a coalition may wish to become more selective when asked to participate in the community's many health/safety fairs. Adds Diver, "Coalitions can choose to participate in those events which target certain neighborhoods or population groups, and simply supply brochures for other events."

**Is there an evaluation plan: measurable goals that reflect community needs?**

Measurable goals help focus coalition efforts to prevent burn-out and feelings of ineffectiveness. Examine injury data in the community to target efforts on crucial risk areas and effective interventions. The goals set as a result of this research should be quantifiable: "decreasing burn injuries by 20 percent" is measurable, "preventing burn injuries" is not. Periodically chart your efforts and their subsequent impact on injury statistics.

Also set short-term and intermediate "process" objectives to reflect the jobs necessary to reduce injuries in your community. "Applaud short term successes," says Novitsky. "Recognize when jobs have been successfully completed and communicate these efforts to the rest of the coalition."

As Gibler says, "If everyone knows the goals, everyone has something to work on."
ard. Concrete events are important. People want to help out on jobs they can do,” Gibler stressed that functions where safety equipment is given away are particularly satisfying, “Giving something to the public gets you back down to basics. Coalition members can march out with an armload of equipment (such as smoke detectors or bike helmets) that they can count, they can feel, and that they know protects people.”

Are coalition activities being communicated to the membership and community?

Interest may be waning in Local SAFE KIDS Coalitions activities because no one knows what the coalition is doing. It’s important to communicate within the coalition’s membership and to get the word out to the community on coalition activities.

Produce a newsletter, even if it is typewritten and copied, at least quarterly. Limit the mailing to coalition members—any related organizations may be interested. A newsletter opens up communication and encourages involvement from all segments of the community. Committee reports at monthly meetings also give a real sense of accomplishment. “You absolutely have to make yourself sit down and do it,” Gibler says of her coalition’s quarterly newsletter. “Our mailing list includes over a thousand people and organizations who might not know what we are doing otherwise.”

Members are more likely to be enthusiastic about their work if the organization is visible in the community. Be sure the media relations arm of your organization is working effectively. Maintain an updated press list and consistently invite reporters to attend your events. Make yourself known as a source on injury prevention in your area.

You might also consider enlisting the bono support of a public relations firm or advertising agency. Many established companies are willing to offer support to a worthy cause at no charge. It might also be possible to work with the public relations department of one of your member organizations.

Novitsky recommends focusing membership recruitment around a special event such as a reception, luncheon or conference. “It’s very important to get your current membership involved in recruitment,” she adds.

Gibler particularly recommends recruiting people with hands-on trauma experience. “They have a lot of enthusiasm and credibility because they feel they are working on some type of solution,” says Gibler. “They see the tragedies, they talk with patients and their parents and, with the National SAFE KIDS Campaign, someone’s finally given them an organized outlet. Some of the burn nurses who work with us thank me for the opportunity to prevent scald burns to kids.”

Am I effectively using the talents of my membership?

One of the most crucial documents is the membership application. This allows you or a membership committee to evaluate member’s skills and determine the committees and activities for which they are most suited. Collar says her members sign up for one of seven committees according to their experience and interest to ensure that everyone’s talents are used effectively. She stresses, however, “We will take enthusiasm and motivation over expertise because you can teach someone, but you can’t instill enthusiasm where it doesn’t exist.”

Collar also points out that a member’s absence does not necessarily indicate a lack of commitment to the coalition. Gibler agrees, and offers advice on avoiding burnout, “Don’t ask everyone to do everything all the time. Keep including less active people when their topic or area of expertise comes up.”

Diver also recommends making a point of involving reticent members. “Be sure to
draw out your less active members. Talk with them one-on-one about their vision for the coalition, or assign them tasks that seem appropriate to their skills and interests.”

Does the team adequately represent the problem, and my community?

Look over your membership and make sure that people with experience, or who express interest, are working on particular injury risk areas. “Without each person doing a good job in their special field, the whole group can’t pull it off,” says Gibler, who also warns against over-representing a particular group or interest as that gives one concern unfair weight in decision-making.

On the other hand, be sure not to under-represent community groups. For example, if you need to reach the Asian population, be sure that Asian community leaders are integrally involved in campaign planning and implementation. Groups that are typically under-represented include youth groups, minority organizations, churches, unions and tenant associations. “Take a fresh look at your team every time you start a new initiative,” says Novitsky. “Coalitions too often limit their range of potential members.”

Is coalition and committee leadership effective?

The commitment and enthusiasm of your leadership trickles down to the general membership and the community. At the top level, “a dynamic coordinator is integral to all of the pieces working together,” says Novitsky.

Oklahoma Coalition coordinator Collar thanks her committee chairs, “We have natural leaders with the time and resources to be actively involved in the nitty-gritty things that are necessary to keep the coalition moving forward and to follow through on projects.” Gibler also credits the success of her coalition to her local leadership. “We keep tapping into really good people. The right folks are right here on our doorstep.”

Remember, though, that some people no longer have adequate time to contribute.

Consider rotating committee leadership periodically to avoid burn-out and to keep fresh ideas circulating.

Are team members regularly thanked?

Be sure to recognize your team members’ hard work. This ranges from a simple “thank you” for a job well done to an annual awards dinner. This simple consideration goes a long way to maintaining member interest and involvement.

Don’t give up!

Using this simple checklist, you should be able to identify problems in your coalition and address them before they become real crises. As Novitsky says, “Coalition re-building takes patience and perseverance. Be sure to give yourself at least six months to see the impact of your rejuvenation efforts.”

E. Suzanne Turner is a freelance writer based in Washington, D.C.
FUNDRAISING
by Regan McClure, reprinted courtesy Community Bicycle Network of Toronto

Definitions

Charitable status - a status granted by the government that allows people who donate to this group to get some of their money back through a tax deduction on the amount they donated.

Donor - a person or organization that gives your group money.

Funding base - how many places you are getting money from.

Funding strategy - how you plan to get money

Honourarium - a nominal cash amount paid to someone for a task, usually not worth the full value of the labor, but as an added bonus. Honourariums are usually small amounts for short-term work.

Infrastructure - the internal structure that is needed to make all other activities possible. For example, having phones is necessary to offering phone counseling, so the phone equipment and phone costs are part of the core structure needed to support the group's activities.

Operating costs - ongoing, basic costs of just keeping a group going, like office space, bookkeeping, having a phone and other costs that will exist regardless of what projects you do.

Project costs - costs associated with a specific activity, such as ads, staff people, photocopying flyers.

Recognition needs - used in this article to mean what level of knowledge people need to have of your organization in order to make your event a success. For example, will people only support your fundraising if they know you're a great group (high recognition needs) or will they attend an event even if they've never heard of you (low recognition needs).

Sponsors - the organizations that are giving money, time or other support to a project or your group. Any group that is involved in supporting a project should be credited or somehow mentioned on written materials, ads and announcements about the project.
There are many different approaches to fundraising. It isn't just a hit or miss activity. Like any other skill, it takes time to develop. The bulk of this time is spent building an established funding base.

Different non-profit groups may have radically different approaches to fundraising; their activities may involve finding a consistent group of people to pay to support it (like an arts center), or searching for people who support their activity despite the fact they will never benefit directly from their service (for example, the Hospital for Sick Children doesn't ask the kids for a donation, although the families certainly make donations).

**Basic Considerations**

Do you have charitable status? If you do, you can issue a tax receipts, which makes private donations more attractive and is required for applying to certain granting foundations.

Do you have a clearly defined community? Do they have enough money to give some to your group?

Do you have administrative costs? Few people get excited about fundraising to cover office supplies - it can be hard to rely on donors or campaigns to raise these costs. Project-oriented campaigns stir people's imaginations more easily. Writing grants can be a better source of funding for operational costs.

Do you have the resources (staff, office, financial reports, structure) to apply for and receive large grants?

How much money do you need? You won't meet a $50,000 budget doing bake sales. You might want to assess a number of different funding sources to make up your total budget.

How defined and easy-to-contact is your community? If your members move frequently, the possibility of a long-term funding base becomes very difficult. Many organizations rely on a small group of 10 to 100 donors who contribute every year. Is this strategy possible for you?

How much time do you really want to spend fundraising? Grant writing can take months, and some groups spend a lot of time just raising their minimal budget. Assess your resources in terms of potential labor, skills and enthusiasm for fundraising.

Can your goals be met by having more money? Before you go off after money, really think about ways to try and accomplish what you need with less funds. Don't spend time raising money you don't need. That may sound obvious, but sometimes organizations apply for grants just because they're there, not because anyone has thought through what they really need the money for.
Charitable donations

When you ask individuals and companies for donations, they like to receive a tax receipt for their donation. For example, the Community Bicycle Network is charitable and can write tax receipts through the Christian Resource Center.

You can try to set up a charitable fund as an aspect of your organization, however, there are restrictions. Charities can only engage in non-political activities. "Education work" is the most likely category to get an application for charitable status approved. Sometimes you can set up a sub-fund for your group, for example, a trust fund for a scholarship for students working on bicycling issues and so on. The main drawback is that charities have to have their own board, and you need to be organized enough to fill out forms and reports on time (charities are closely supervised by the government).

Project funding

Most of your fundraising should come under the category of project funding - it's much easier to get than funds for general administration. Don't think of core staff or expenses as doing "administrative" work, but a series of projects. You can meet your overall operating costs by combining a number of project budgets.

Projects are good to fundraise around because it's self-explanatory why you need the money. You can think up many different kinds of projects, from events, publications, conferences, lobbying campaigns and so on, that you can raise money for by charging admission, grant writing, co-sponsorships, direct mail campaigns and so on. Even if you are fundraising to cover your basic operating costs, make it for something special - call it the buy a computer campaign.

Small is beautiful

You don't have to design big campaigns to raise a lot of money. Decide what you need and go after it. It is a disadvantage if you think "Oh, we could never raise enough to do that." Don't let yourself fall into that trap. Professional fundraisers can pull in millions of dollars with slick campaigns. However, they also spend hundreds of thousands of dollars and years of work getting the money.

The best way to frame the problem of raising funds is define:

- why you need the money
- how much you need
- who you can ask for it.
**Some general tips**

**Be consistent.**

The best thing to do is to develop a specialty and stick with it year after year. After you've done it once, you already have some basic information about how to organize it and campaigns gain momentum over time.

Many organizations put on one or two events that keep them in money. For example, the AIDS Committee of Toronto puts on the Walk for Life that raises about a million dollars. A women's shelter sells a recipe book that nets about $50,000. A lesbian and gay university group puts on 4 dances a year and raises about $6000. The key to success in all these cases is that these groups improve on their strategy over several years. When you've done it before, you already have the contacts, know the location, where to take out an ad and send out the posters. The events are well attended too, because they develop a reputation.

The hardest part of fundraising is building up a group of people who like to give you money and a group of people who like to organize fundraising events for you. Every time you do it, you get better at it, you can expand the number of people who participate in it and make progressively more money. Changing strategies every year will just frustrate you.

This doesn't mean you have to stick with a bad idea, but don't have really high expectations for the first few years. It takes time to work out the bugs in the system. A good fundraising campaign comes naturally out of the purpose and structure of the organization; it's developed over the years because of its value in publicity, volunteer recruitment and educational purposes before it begins to make real money.

**Pick what you know.**

You need to have the skills to pull off the fundraising activity. If you have skills with artwork, don't try to make money by offering to repair computers. It makes it harder to try and learn how to do something at the same time you're trying to get it done. You also need to be organized enough to support fundraising activities. For some groups, have a canvassing campaign makes sense because they already have a newsletter (which they offer people who donate money), people who know how to organize canvassing efforts, people in the community who know who they are (the result of years of publicity) and so on. If you don't have that existing level of organization, canvassing would be a disaster.

**Pick who you know**

People don't give money to organizations, they give it to other people. It's good if you represent a worthwhile organization, but they need to have a sense of "knowing" who you are. Try to get money from people who've come into contact with you before - past board members, volunteers, staff, community leaders, members of similar organizations, people
who've benefited from your work in some way. Also, you need publicity in general if you plan on a big fundraising campaign. Explaining what your group stands for, what kinds of work you do, how your operate and why you want their money is too long. Recognition value helps you focus more on the issue at hand without having to do all that background work.

**Use the resources you already have to the fullest advantage.**

If your group has staff people, skilled volunteers, office equipment and other resources that can be used in raising money - then do things that groups who don't have these resources can't take on, this reduces competition and makes use of your resources. A good example of this is selling products through an office, many groups can't provide the staff needed to keep an office open or can't even afford rent.

The special skills of your staff and volunteers should also be considered in fundraising.

**Cover your costs**

One of the best ways to raise funds is just to not spend anything up front. For example, you can put on a conference where the advertising is paid for by the campus radio station and newspaper (who are co-sponsoring it), the printing is donated by another campus group (they paid for the printing, your volunteers will be doing the posterimg), the speakers are sent by a local speaker's bureau, the event is organized by a grant staff person, the food organized by a catering service, and miscellaneous expenses are covered by passing a basket around after an enthusiastic speech during the conference.

When people participate in something, the need for funding is obvious. Because they benefit directly, many are often willing to donate towards the cost of the event. Many of your programs can make back some of their costs.

**Recognition**

Develop a logo that people can quickly recognize.

If your group isn't well-known, organize around a cause that is. If more people will come out for bicycle parts to Cuba or bicycles user groups, then organize your campaign around those issues. Tell them about your group's larger mandate after they arrive.

**Fundraising Events**

**Move-a-thons**

- Organizational status: nothing official needed
- Volunteer needs: high
• Infrastructure: contact phone, good community contacts
• Time: initially very high, possibly 3 months
• Fund use: unrestricted
• Expertise needs: high
• Recognition needs: high
• Financial gain: $2000 and way up

Move-a-thons are hard to organize the first time, but get a lot easier as you go along. It is especially useful if you have a lot of volunteers who can help out on special occasions. You need to get the permit to hold the walk, you can use a city street or make it a trek through a park or wildlands area (especially handy if you're trying to raise money to clean up the area). Contact your City Department of Public Works if you want to get a permit.

You can use a variety of locomotion in the move-a-thon. It could be a bike-a-thon (handy for raising money for a bike club), a walk-a-thon, run-a-thon (which attracts people who just like to run) and so on. A move-a-thon allows for people to use whatever mode of transportation they want to, including wheelchairs. You can attract people just for the sport of it, including biking, boating, swimming, skating, go-carting and so on. Be creative. People who are more sports-oriented are happy to pay a $5 or $10 registration fee for the chance to sweat and win prizes (for the top competitors). You can often get prizes donated by businesses.

You'll get more people each year. How popular the event becomes depends on how much fun it is - try and be creative.

Raffles
• Organizational status: charitable status legally needed
• Volunteer needs: low
• Infrastructure: venue to make sales, contacts with businesses to donate prizes
• Time: fairly low, mostly selling time
• Fund use: unrestricted
• Expertise needs: low
• Recognition needs: low, especially if you have good prizes
• Financial gain: $100 to $1000 average, very large draws possible

Raffles involve administration, ticket distribution and sales. You'll need at least one volunteer in charge of each aspect. The more ticket sellers and distributors you have, the more tickets you can sell.

Allow for enough time in planning your raffle. It takes time for tickets for the permit to be approved (usually a week or two, but up to 30 days if this is your first raffle), the tickets to be printed (3 to 4 days) and the sales to occur (2 to 3 weeks). You also need to search for donated prizes before you even get the permit.

You need to keep track of how many tickets were printed, who has taken tickets to sell, who has actually sold tickets and who bought which ticket and their phone number so
you can contact them. Don't make the ticket stubs too long to fill out, especially if you want people to buy several. Their name and phone number is enough.

Permits

You may need a permit to operate a raffle, from your City Hall Clerk's Office. It's not hard to fill out, but the need for charitable status is difficult. You may want to co-sponsor (officially) with a charitable group.

You need to know what the prizes are, how many tickets you'll print, how much you're selling them for and when the date of the draw will be before you get the permit. Once you've decided on this, you can't change it, so be sure to get a few extra tickets printed so you don't run out.

Don't start selling tickets before you get the permit, they must be printed with the permit number on them and sequentially numbered. The name of the printer must be on each ticket as well, which gives you a chance to ask the printer for giving you the job at cost, since they get advertising with every ticket you sell.

If any tickets or stubs go missing, your raffle is invalid and your license will no longer apply. Keep good records of all the tickets. You'll need to send in a report after the raffle is over. The report form should come with the application.

Prizes

Raffles and lotteries can vary from raffling off a bike to full-fledged casino nights. The latter I'd recommend only if you have some people skilled in running these events. In some towns you can hire companies that provide professional blackjack dealers and so on for a cut of the total.

Prizes don't have to be expensive to be valued. For example, you could make a package of a dinner at a restaurant and a limousine to an evening performance. The total cost is only about $120, but since so few people can afford to spend that much money in a single evening, it seems like a real luxury.

Other items that people value but don't spend money on are personal services, especially massages (it's not too hard to get a professional massage therapist to donate one free massage), having their apartment painted, body lotions and creams, entertainment, travel, books, good clothes, computers, camping gear and bikes. Remember, the sense of "luxurious" is what counts.

You can also raffle off "experiences", a dinner with a local author, a chance to meet someone famous and so on. People who are famous, semi-famous and otherwise notorious are usually happy to donate their time to a cause they believe in.
You can make political points with your prizes, for example, the first prize can be the Premier's salary for a day, the second prize a social worker's salary and the third prize the daily allowance of someone on welfare. Try and be creative with your prizes, it attracts interest.

Stores are usually willing to donate merchandise or gift certificates. Approach the businesses in your area, or that cater to your clientele.

When making the pitch, get right to the point. Introduce yourself and the group. Explain that you're organizing a raffle to raise funds for this registered, non-profit charity, ask if they can support your efforts by donating xx amount. Don't go into a long explanation about the group unless they ask questions, give them a pamphlet instead. Sometimes visiting stores can be good, because you can see their merchandise selection. Ask for gift baskets if they have them.

If they say yes, make arrangements to pick up the prize right then. Have someone go and collect it within a few days. If they say maybe, arrange to call them back on a specified date. If their prize is going to be first prize, say so. Remind them of the advertising value of their prize.

Sales

The lower the price of your ticket, the more tickets you can sell. Compare it with other ticket prices. If they are selling for $1 and $2, your prize had better be substantial if you plan to charge more, especially when you compare it with some of the large, government-sponsored lotteries where you can win substantial amounts of money for a $2 or $5 ticket.

If your prizes are small and don't warrant a ticket price of $1, sell 2 or 3 for $1, but never 50 cents each. Avoid any ticket price that involves coins. You may want to group tickets into books of 6 and sell them for $1 each or 6 for $5. This makes your accounting a little more difficult, so add up the sales before you pull the ticket books apart for the draw. (Otherwise, put the tickets into books of 10 to make records easier).

Don't pressure people into taking more tickets than they can sell. If you give them 50 tickets and they only sell 10, they don't feel good returning 40 tickets. It makes them feel like they've failed, which isn't true. Since people feel bad about returning the unsold tickets, they won't give them to you until moments before the draw, or maybe after. All along, you might assume that they were able to sell 50 tickets, and overestimate the number of ticket sales.

The draw

The draw should be at a public event, or for example, the culmination of an Open House day, an Annual General Meeting, a conference and so on. It's ideal if the winner is likely to be present at the draw. Send a press release after the draw announcing the winner.
Always collect people's phone numbers on the ticket stub so you can call them to tell them they won.

**Concerts and special events**

- Organizational status: nothing official
- Volunteer needs: moderate to high
- Infrastructure: cash up front for booking venues etc., a well-organized volunteer base, contact phone, good advertising and places to sell tickets
- Time: moderate
- Fund use: unrestricted
- Expertise needs: moderate
- Recognition needs: low, especially if it's a fun event
- Financial gain: $400 to $3000 average

With some exceptions, special events are not large money raisers for the time involved. However, hosting special events is a way to give people something in exchange for their donation. Small businesses are usually more able to contribute in-kind donations for an event than make a cash donation. It's also much more fun for volunteers to work on organizing. Special events bring your publicity and community awareness, can help increase your volunteer base and otherwise introduce people to your organization. Carefully choose events that will be relatively easy to organize.

**Selecting an event**

Start up costs can affect the type of event you choose. Suppose you brought in a big speaker for $4000 and sold 100 seats at $10 each, that's a tidy profit for the evening. However, you need to have the $4000 up front, as well as investing money in advertising, booking the hall and other expenses. The gains are big, but the losses can be unmanageable if you don't sell enough tickets. If you plan on putting on a major event like this, be sure you also have enough money to properly advertise it and distribute the tickets. If you don't have experience organizing events of this size, stick to smaller events.

Put on events you'd actually like to go to yourself, not something you think people "should go to." If you think it's nice but wouldn't go if you weren't organizing it, chances are that other people feel the same way. Try to be creative; try a new approach. It should be fun to organize and fun to attend.

Make sure the date of your event doesn't conflict with other community events that would draw the same crowd. Call around different organizations and ask them what they're planning.

While estimating costs, assume that you'll have to pay for everything. If you get donations, that only increases your profit. When estimating revenue, lean on the conservative side to avoid unrealistic expectations.
Sales tips

Never just sell tickets at the door. Advance ticket sales are the bulk of most sales for large productions. If someone's already bought a ticket, they will make every effort to attend. Sometimes people will buy a ticket just to support the group, even if they don't plan on attending. To encourage advance sales, offer cheaper prices in advance, and higher cost at the door.

Distributing advance tickets is essential. A ticket coordinator should make sure volunteers sell tickets and that they don't sit in people's cupboard at home. Also, tickets should be available through bookstores, your office and other places where people who might want to attend the event hang out. Unless you sell out, tickets should be available at the door.

Print up tickets with stubs or a detachable receipt. The stub can be used for auditing and record keeping, and can be used for fundraising or volunteer lists. A simple check off if people would like to volunteer with your group can recruit some volunteers.

Volunteers

Some events require more volunteers than others. Only take on events if you have enough volunteers or can easily recruit more. Some groups offer an honorarium to a volunteer who agrees to be responsible for the overall coordination of the event. Not everyone agrees with the concept of a paid volunteer, however the purpose is to ensure that someone has ultimate responsibility for the task, which increases their commitment and often makes other volunteers more responsible with their tasks. For some reason, this increased sense of responsibility doesn't come when a staff person is being paid to coordinate the event, mostly because volunteers figure the staff person can devote full-time hours to finishing last-minute tasks.

Try and sub-contract out where possible to simplify the event. Don't arrange food, sell a food booth to another community group for 10% of their profits. Don't organize liquor sales, try and get a bar to give you free space if they get the money from the bar. This simplifies your event a lot; you can take on more responsibility as you gain experience.

Advertising

Advertising is essential to a successful event. A general rule for advertising is that the less you think you can afford it, the more you're going to need it. Ideally, your event would be co-sponsored with a radio station and a newspaper, who would agree to carry a sizeable ad for you. Advance ticket sales also help bring publicity, and tables and posters can help raise awareness. Also, free listings are often read more thoroughly than the rest of the paper.
For major events, however, paid advertising is a must. Don't waste $78 dollars on an ad that's 2 inches tall. Waste $500 on a half page that will actually get someone's attention. At least you stand the chance of someone seeing it and buying a ticket.

Wherever possible, design the ad yourself, newspaper staff are often rushed and can't do the job just the way you want.

You can put on special events with other groups, in order to cut costs and share the labor of putting on the event. If you don't have the money, volunteers, experience or ticket distribution network to put on the kind of event you think would be good, approach another group. Learn as much as you can from groups that have experience with these kinds of events.

**Parties and dances**

- Organizational status: nothing official
- Volunteer needs: low to moderate
- Infrastructure: cash up front for booking venues etc., a well-organized volunteer base, contact phone, good advertising and places to sell tickets
- Time: moderate
- Fund use: unrestricted
- Expertise needs: moderate
- Recognition needs: the dance itself needs a good reputation
- Financial gain: $400 to $1500 average

The logistics of hosting a party or a dance are about the same, expect that a party is considered a private event (and you don't need a permit), while a dance will require a liquor permit.

Parties are smaller to organize and net less money. They are usually advertised through word of mouth (because other advertising makes it public and occasionally illegal, depending on whether you sell alcohol and so on). You make money by charging for drinks, or for admission. You can include food or snacks as part of the deal if you charge an admission fee. You can raise a fair amount of money by hosting a party/dinner for $50 a plate.

Dances are public events. The easiest way to organize a dance is to hold it in a bar. They provide the liquor and the liquor permit, and they keep the profit from the sale of alcohol. You can charge admission at the door, and through a coat check, raffle and food sales. Bars and pubs are usually amenable to this. Be sure to get a good night, Friday or Saturday, most bars like to have events on nights when no one comes anyway, so they don't lose anything. However, there are reasons people don't go to a bar on a Wednesday night, so it's safest to stick with the weekend.

Sometimes you need to arrange for the DJ or band, other times you need to hire someone yourself. The cost is usually about $400 or so. Ask another organization that's put on a
dance who they got and what they paid. The music is very important, so you may even want to get two different DJs who will draw different crowds.

Dances can be time consuming at first, but you can spend less time and make more money as they go on. Once you pick a good venue, a good DJ and get a good reputation, dances and parties can be good return for your money. Unlike special events, they can be repeated fairly regularly.

**Letter campaigns**

- Organizational status: nothing official
- Volunteer needs: high set up, low thereafter
- Infrastructure: quite a bit, potential to lose money on initial costs
- Time: high set up, moderate thereafter
- Fund use: unrestricted
- Expertise needs: high, especially for set up
- Recognition needs: high
- Financial gain: $500 to $5000 average, more is possible

Also called direct mail, it can take several forms from a few handwritten notes to friends, a photocopied letter to several supporters or a several-piece mail-out to hundreds or thousands of people.

**What you need:**

* **A computer**

Doing mailouts without them and it's impractical for more than 100 pieces of mail. You also need to have the database software to go with it (ideally). DBase is well known and hated, Microsoft Access is easier to learn. If you must, you can type up sheets with addresses on them that you photocopy onto labels, but you'll need to track who made a donation by hand.

* **A reliable mailing list**

Having a good list of essential. That's why your name is sold on mailing lists, it's valuable. If you mail a request for donations to total strangers, you can expect that 2% of them will respond to your pitch. Some groups have mailing lists of previous donors where 75% of them donate each year. this vastly reduces your mailing costs. You need up to date addresses of likely donors.

If you want to begin a mailing list, try inserting a fundraising flyer with a related newsletter (it's cheaper than mailing on your own).

**Tips**
Tailor your appeal when speaking to different groups. Your organization means different things to different people, you can have several forms of letter that emphasize different aspects of your work.

**Make it an occasion**

It shouldn't be just another letter asking for money, call it the "Send a Bike to Cuba", "Annual Move-a-thon for Greener Cities" or "Environments without Borders." Give it a name that's written in capital letters so people know it's real.

**Do follow up**

The first few mailouts will be difficult and costly. Once you begin to narrow down you mailing list, you end up with a trim group of a 20 to 200 people (usually) who give regularly. Allow for follow up for people who don't donate at first, give them two tries and then cut them from the list. Some people will drop out over the years, they need to be replaced by new donors, usually acquired by exchanging mailing lists with another group.

**Don't duplicate lists, it's wasteful.**

Make sure you spell their name right and that the address is up to date.

Keep track of people who have given money from year to year. Record who donated how much and when. If someone has donated before, they should be kept on the list even if they didn't donate this year. Also track the type of donor - individuals, companies, university related people, community groups and so on. You may not want to start this process if you think that a large percentage of your donors will relocate each year, you be sending 10% or 20% of your mail to wrong addresses each year.

Don't do direct mailing for environmental causes. You may get some money, but you'll get more comments about how you're wasting paper. Unless you plan on printing on hemp paper, better stick to phone calls or some other method.

Piggyback your mailing, with another organization's newsletter or mailout, or with your own newsletter or regular publication. The costs of mailing are quite high, and many groups are willing to let your insert your flyer and/or fundraising letter as long as you help them with the work of stuffing and mailing.

Some things to include are:
- a brochure describing your work
- a return envelope (not stamped, you don't want people thinking you have money to waste)
- a donation card or clip-out section
- a financial report (especially when mailing to businesses).
The fundraising letter should be short and positive. Don't beg or threaten extinction without their support. People don't want to donate only to watch you close down in 3 months.

**Merchandise sales**

- Organizational status: nothing official
- Volunteer needs: low
- Infrastructure: venue to make sales, cash up front
- Time: low
- Fund use: unrestricted
- Expertise needs: low
- Recognition needs: low
- Financial gain: $200 to $1500 average, more is possible

**What to sell**

You can sell practically anything. For example, string shopping bags, sweatshirts, T-shirts, hats, scarves, key chains, coffee, pens, postcards, bumper stickers, crafts, mugs, plants, mess kits and publications.

There are distributors for most of these items who sell mass quantities to groups. This way, you can get your name or logo and/or a message printed on the item for sale.

Don't sell items that have a limited selling season, such as Christmas cards and day books. Don't sell items that have stiff competition (especially from other non-profits) and avoid items that make more money for the distributor than you (such as chocolate bars, which rely mostly on the chocaholic volunteers breaking down and eating them, then having to pay you back for the boxes they took to sell).

Sell things that make sense, don't create waste. Your publications also serve an educational purpose. As a test, decide if you would personally pay money for this. Don't ask people to buy junk just to support your group.

**Price**

The price must be low enough to make the sale, especially if you're beginners at this. For examples, sweaters are nice to sell, but not many people walk around with $50 on hand. Stick to something cheap. Also, don't buy too much different merchandise, it's hard to keep track of it all. If you sell plants, just have 3 or 4 prices for a variety of plants, it's easier to track that way. Only have variety at a bazaar or table, where the variety will attract people.

Offer discounts for bulk sales. For example, sell greeting cards $1 each or 5 for $3. As they say in sales "a quick nickel is better than a slow dime."

**How to sell**

7-18
Don't count on selling everything to your membership's friends and relatives. It's a good market, but we tend to overuse it. Sell items at each event throughout the year. Ask other groups if you can set up a display to sell goods at their events, they'll agree if you allow other groups to do the same at your events.

Some stores (especially bookstores) will agree to sell your merchandise, but usually only on a consignment basis (which means that they don't owe you any money until the goods have been sold, and that they can return unsold merchandise to you). They also usually want a commission of 20% to 40%, so work that into your price. You must have accurate records and follow-up on sales to keep track of where your merchandise is stocked and how much has been sold.

You may decide that the publicity and educational objective is enough to give the item away. Buttons and pens are great to give away at speaking events. Usually asking for a donation for these items will more than repay the cost of producing them.

Before you begin, ask around to other organizations. How many copies of the book did they print? How many buttons do they sell, how many did they sell in their first year? They can tell you about their successes and failures.

**Bake and garage sales**

- Organizational status: nothing official
- Volunteer needs: moderate
- Infrastructure: venue to make sales
- Time: moderate
- Fund use: unrestricted
- Expertise needs: low
- Recognition needs: low
- Financial gain: $50 to $500 average, more is possible

The rules for merchandise sales apply here with one exception. Bake sales and garage sales usually ask the volunteers of the organization to subsidize its activities. Think carefully about whether or not you want to do this, after all, fundraising is about taking from the rich to give to the poor, not the other way around. Unless a volunteer comes forward with a suggestion to raffle off their handmade quilt or sell their household items, it may be expecting too much for volunteers to donate so much, especially when the profits are so minimal. It isn't necessarily the best value you can get for your volunteer's labor, and nothing is more depressing than working for 4 hours to sell $10 of rice crispy squares. Always be sure to ask non-volunteers for donations. Ask bakeries to donate cakes and baked goods to the sale. For garages sales, advertise in the general community that you'll come and pick up donations people would like to make. Then, if your volunteers want to contribute something themselves, that's fine. A better way to use your volunteer's cooking skills is to host a full dinner, where people pay $10 - $20 a plate and can select from a variety of home-cooked dishes.
PRODUCT
Having a good product to sell is a nice way to raise a little money.

Shawmut Peninsula Walk
Tracing Boston's Original Shoreline

Huddled on the small, hilly Shawmut Peninsula, Colonial Boston was sometimes cut off from the mainland by particularly high tides. Over the centuries (and especially in the 1800s) the hills were leveled; the peninsula was enlarged by fill and built over.

WalkBoston, a non-profit advocacy organization that encourages walking for recreation and transportation, has created a handsome, three-color, walking-tour map that shows the old Shawmut Peninsula superimposed on Boston’s present-day streets.

The walking route follows streets near the edge of the original peninsula. Information on the back, keyed to points of interest, opens a window into Boston’s social, commercial, and geographic history of the 17th and 18th centuries.

With the form on the other side of this sheet, you can order your copy of the Shawmut Peninsula Walk today.

The Shawmut Peninsula Walk features:

• Easy-to-read three-color format
• Identification of neighborhoods, historic areas, transit stops and rest rooms
• Special points of interest keyed to text and illustrations on reverse
• PRICE: $4.95 each + $1.05 shipping & handling.

Order Form:

Shawmut Peninsula Walk
Tracing Boston’s Original Shoreline

Please send me ___ copies of the Shawmut Peninsula Walk map at $4.95 +$1.05 shipping and handling each.

(WalkBoston members, $3.95 + $1.05 shipping and handling.)

Name: ______________________________

Street: ______________________________

City/State/Zip: ________________________

Mail completed order form and check or money order (no cash, please) payable to:

WalkBoston, 156 Milk Street, Boston, MA 02109

Please allow 3 weeks for delivery.

Bulk discounts available. Call 617-451-1570 for information.

WalkBoston is a non-profit advocacy organization that promotes walking for recreation and transportation. Our mission is to create and preserve walkable, livable communities through education and advocacy.

___ I am currently a member of WalkBoston.

___ I am not a member, but please send me information on joining.

(Side 1 of 2 of a small sheet)
Dear WPC Members and Friends,

We have exciting news for you and a special request!

**The NEWS**

**Three items of interest:**

- The Willamette Pedestrian Coalition is **preparing to go online** with what we believe to be the **first national pedestrian-focused computer network**. To start, we will host an electronic "mailing list," aptly named—"PedNet"!

  This means:

  - Users on the PedNet mailing list will be able to talk to people around the world about ways to create a better pedestrian environment.

    **You are all invited to join**—look for details in a future issue of *footnote*. For those without computer access, look for monthly reports in a special column. If you have questions or information to send out, and you don't have a computer connection, call the office or write c/o the newsletter.

  - Eventually, via the Internet, the WPC will be able to plug into information stored in databanks across the country and will be able to share this information with anyone on the list.

    With access to libraries and databases nationwide, we should be able to do the kind of creative research needed to have an even greater impact on land-use and transportation policy. And by opening a group dialogue, we expect to find more support and have a broader exchange of ideas and solutions.

A friend of the WPC is **customizing a database** for our specific data collection and assessment needs. When finished and tested, we may be able to share this system with other groups. *(If you have energy or interest for the project, contact Robin Peterson at Internet: peterson@atheria.europa.com or call Pam at 228-9306.)*

- To accommodate these changes, we are buying a computer. *(We're currently using someone's private, older computer to maintain our database and publish the newsletter, and that computer has reached its limit!)*

---

**AND NOW, OUR SPECIAL REQUEST**

**We need your help in buying the computer.** Our budget is $1,000—for a used Macintosh SE/30 ($775), with software and modem ($225). Any contribution you can make towards this goal will help. This is an exciting project which will involve and benefit the community as a whole, so we feel enthusiastic about asking for your support.

*Let us know how you'd like to help:*

- I can donate $______________ Check enclosed, made out to the Willamette Pedestrian Coalition. *(No donation too small. The WPC has filed for Federal Non-Profit Status, so your donation will be tax-deductible retroactively when we are awarded our tax-exempt status.)*

- I can offer energy and ideas for your fundraising efforts. Call me at ________.

- I can offer computer equipment or help along the way. Call me at ________.

- Let me know more about connecting to PedNet. Call me at ________.

*Clip and send to WPC, PO Box 2252, Portland, OR 97208-2252.*

*Thanks for your ongoing support of the WPC. Look to *footnote* for updates on the computer purchase and the electronic mailing list.*

*Name______________________________*
Proposal Checklist and Evaluation Form

By Norton J. Kiritz

This form, designed for use in the Grantsmanship Center Training Programs, follows the format of our "Program Planning and Proposal Writing" booklet. It can assist the proposal writer in the preparation and improvement of a complete proposal. It is also an aid to the proposal evaluator in assessing the merit of a grant application.

Yes/No answers indicate whether or not an item is included. The numerical rating (1 is poorest, 5 is best) is for use where applicable.

Proposal Components and Necessary Items:

<table>
<thead>
<tr>
<th>Summary: Clearly and concisely summarizes the request</th>
<th>Comments on Summary</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Appears at the beginning of the proposal</td>
<td></td>
</tr>
<tr>
<td>2. Identifies the grant applicant</td>
<td></td>
</tr>
<tr>
<td>3. Includes at least one sentence on credibility</td>
<td></td>
</tr>
<tr>
<td>4. Includes at least one sentence on problem</td>
<td></td>
</tr>
<tr>
<td>5. Includes at least one sentence on objectives</td>
<td></td>
</tr>
<tr>
<td>6. Includes at least one sentence on methods</td>
<td></td>
</tr>
<tr>
<td>7. Includes total cost, funds already obtained and amount requested in this proposal</td>
<td></td>
</tr>
<tr>
<td>8. Is brief</td>
<td></td>
</tr>
<tr>
<td>9. Is clear</td>
<td></td>
</tr>
<tr>
<td>10. Is interesting</td>
<td></td>
</tr>
</tbody>
</table>

Norton J. Kiritz is the president of The Grantsmanship Center.

Copyright ©1979 The Grantsmanship Center
### VI. Future Funding

Describes a plan for continuation beyond the grant and/or the availability of other resources necessary to implement the grant

<table>
<thead>
<tr>
<th></th>
<th>Yes</th>
<th>No</th>
<th>1-5</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Presents a specific plan to obtain future funding if program is to be continued</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2. Describes how maintenance and future program costs will be obtained (if a construction grant)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3. Describes how other funds will be obtained, if necessary to implement the grant</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4. Has minimal reliance on future grant support</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>5. Is accompanied by letters of commitment, if necessary</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Comments on Future Funding

---

### Budget

Clearly delineates costs to be met by the funding source and those provided by other parties

<table>
<thead>
<tr>
<th></th>
<th>Yes</th>
<th>No</th>
<th>1-5</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Tells the same story as the proposal narrative</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2. Is detailed in all aspects</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3. Projects costs that will be incurred at the time of the program, if different from the time of proposal writing</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3. Contains no unexplained amounts for miscellaneous or contingency</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4. Includes all items asked of the funding source</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>5. Includes all items paid for by other sources</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>6. Includes all volunteers</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>7. Details fringe benefits, separate from salaries</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>8. Includes all consultants</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>9. Separately details all non-personnel costs</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>10. Includes indirect costs where appropriate</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>11. Is sufficient to perform the tasks described in the narrative</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Comments on Budget

---

This reprint is available from The Grantsmanship Center. For a free copy of The Grantsmanship Center Magazine, which includes a reprint price list and order form, as well as a current schedule of Grantsmanship Center Training Programs, write to: The Grantsmanship Center, Department DD, P.O. Box 17220, Los Angeles, CA 90017. Phone: 213-482-9860, Fax: 213-482-9863

---

7-23
WRITING GRANTS
by Regan McClure, reprinted courtesy Community Bicycle Network of Toronto

Definitions

Charitable status - a status granted by the government that allows people who donate to this group to get some of their money back through a tax deduction on the amount they donated.

Deliverables - what your group agrees to produce as part of a grant or project. When you get the money you define what will come out of the work, for example, reports, written materials, a 50% increase in cycling in your co-op, a survey on community needs, slides and so on.

Foundations - a fund of money that's set aside for making donations, often started by wealthy individuals or corporations.

Granting agency - the organizations that is giving money for a project or for your group. In-kind donations - a donation that doesn't involve money but something else of value, for example, your volunteers donate their time. You can work out the cash value of this donation by figuring out how much you'd have to pay for their labor if they weren't volunteering. Administrative support, phone access, space, equipment and supplies are other things that you may be receiving that can be counted as in-kind donations.
Sponsors - the organizations that are giving money, time or other support to a project or your group. Any group that is involved in supporting a project should be credited or somehow mentioned on written materials, ads and announcements about the project.

Strategizing

Before you write a grant application you need to:

- Figure out the type of funding you need.
- Identify potential funders.
- Find out about application procedures and deadlines.
- Request applications packages if needed.
- Apply for the funding.

Goals of fundraising:

a. Need. To figure out what kind of funding you need you must know your fundraising goals as an organization. Before you approach anyone, figure out how much money you need and how you want to use it. Don't just apply for money because it's there. It can consume a lot of staff time and end with unneeded projects.
b. **Variety.** You need to find lots of different places to approach for funding, and have different types of funding. Don't be dependent on any one source of funds for your organization, or large projects you take on. If there are diverse funders for a project, no single funder can take control of it. Also, funders rarely like to pay all the costs related to a single project, they like to see that other places have been approached for funding as well.

c. **Internal fundraising** such as events, memberships, user fees and donations are also a part of funding for your organization overall. Be sure to mention that the staff supervisor, the rent and overhead costs of a project are being shared by your group; grant agencies like to know this.

d. **Organizational memory** is important for grant writing. The fundraising process is annual and ongoing. Establishing a relationship with funders and an awareness of when grants are due is important. Whenever you write a grant that's rejected, try to find out why. This will help you learn more about the art of grant writing.

e. **Long-term and short-term objectives** for grant writing should be established. Some kind of grant writing policy that corresponds with your organization's goal plan should be introduced. For example, do you want the grant staff to assist in developing your community profile (an objective of the board) or are the jobs being created to provide students with interesting summer research opportunities? Decide this before you apply for grants. Also, you should have some kind of policy on applying for corporate sponsors, private foundations, government agencies and more. Are you going to review it on a case by case basis or have you already decided that a particular source of funds is not appropriate for you?

f. **Document your need for funding.** You need to show not only that you want the money, but that you need it too. There are different types of funding - core, project, operating and capital funding. What areas of your operation need funding the most? Do you have statistics, needs assessments, financial budgets, letters of interest or support that show a need for what you propose to your funders? What kind of funding do you want. You can get in-kind support (ask a computer store to give you a deal on a computer), ask for help setting up a filing system, office equipment or supplies, free publicity and other things.

g. **What can you live with?** Grants come with conditions. Always. What conditions can you live with? Some employment grants require you to pay staff people minimum wage - do you want that? Some places will only fund projects that fit their criteria - do you fit those? How far are you willing to alter you goals to get the money? Sometimes the condition may be financial reporting, can you provide that?

**Identifying sources of funding**

Two questions to ask yourself about funders is:
1. Who do you think should pay for this? This question particularly applies to
government organizations. Many government agencies get their work done through
community groups. They want to give you money because it's part of their job.
2. Who has paid for this in the past? This question most applies to private foundations
and corporations. They tend to have trends in the type of projects they'll fund.
Although their criteria change from year to year, if they've funded something similar
in the past it's worth asking them again. Also, you can ask other organizations who've
done similar projects where they got their money from - this can makes this process
go faster.

Identify sources of funding in advance of working on a project if possible. This way you
won't miss deadlines or end up rushing around. Keep information you find on file to use
again next year.

Brainstorm

A good start to identifying funders is to brainstorm all the possible relations of a program.
Don't think "bicycles", think energy conservation, health, physical fitness, environment,
education and community services. Don't think "community garden", think municipal
greenspace, recreational activity, environment, public education (schools?), social
services (old age homes?), parks and recreation, food and agriculture.

Types of funding include:

Public funding: this means government agencies and departments - federal, state and
municipal. Generally, these programs have application forms to fill out, and while you
can develop a relationship with these agencies, it isn't as important as with private
sources of funding

Private funding: includes the United Way (which only gives to charitable
organizations), religious charities, businesses and individual donors. Having a charitable
number really helps when you're approaching these types of funders.

Foundations: there are community, corporate and family foundations that have a fair bit
of money. The best way to find out about them would be to go to the library and look up
information on foundations. Many communities have branches of the Foundation Center.

Community funding: Other community groups may be willing to give you funding,
especially for projects of joint interest. This includes, unions, service clubs (such as Lions
cub etc), women's groups and other community groups.

Fundraising: Many funding agencies take a positive view of you raising money yourself,
in addition to asking them for money. Also, many agencies like you to have some
provision to recoup costs of a publication, event and so on.
The time spent writing grants

Writing grants is a lot like writing a resume - you are asking someone for their money to do something you like. Like resumes, it saves a lot of time to write up a few basic applications, and then make variations to suit each individual grant. This means that planning and drafting your initial applications will take a lot of time, but that each subsequent application will go more quickly. Getting multiple funders for a project also means that you reduce your dependency on any one source of funding.

On average, it can take anywhere from 4 hours to 3 days to write a proposal. Sometimes a proposal for $2000 will take more time than one for $40,000 - there's no correlation. In general, the first grant you write is the longest because you have to collect information like annual reports, budgets, letters of support or a list of board members.

Make up a calendar of deadlines so you aren't rushed.

To save time, ask other organizations who are similar to you where they get their funding from. Ask them what experiences they've had with funders. Some agencies encourage everyone to apply but rarely give out grants, some don't pay up their money until after the project is completed - leaving you with a cash crisis.

Generally, it's good to apply to 4 or 5 reliable places each year (i.e. they've given money to your group or a related one in the past) and add a few off the wall applications each year just to see if you have a chance.

What to learn about your funders:
- eligibility criteria
- application forms
- deadlines for sending in an application
- program descriptions (who they serve)
- program priorities and how often they change
- a key contact person (in government agencies, personnel change over more, however, in private funders a contact person is essential)

Making your application

Approaching the funders

For government agencies you normally just have to fill out a form and send it in. If you want to approach private funders, which have a lot more "discretionary funds", it's a good idea to take a personal approach. This involves attending a meeting to explain your proposal, inviting the funder to learn more about your organization by inviting them to a volunteer night or annual general meeting. This apparently "kiss ass" approach is why some organizations don't like getting private funding, but if you think about it, it's what
we do without question when we ask another community group to co-sponsor something. They simply want to know that you can be trusted with money.

Writing an effective funding application

You need to demonstrate that your proposal is:
- unique (that someone else isn't already doing it)
- effective (that you will make something happen)
- credible and dependable (that you won't mess up)
- needed (that what you're doing fills some need out there)

Ensure that all the funder's questions are answered. For government forms, there are a few open ended questions that allow you to demonstrate your capacity to use their language and show that you've read their funding criteria carefully. Repeat, using creative variations, all the key words in their guidelines. As they skim the proposal these words should jump out at them. Don't however, parrot them line for line, or they'll get offended.

Most government forms are fairly standard, although for private donors you have to make up your own funding package. It should include:
- A title - things that have titles are well-defined and easy to refer to. Put key words in the title so you can file it easily.
- Identify the specific project or service that needs the money
- Prepare an introduction to both the organization and the project. If the funder isn't familiar with your group, tell them your history, mission statement, year of incorporation, charitable or non-profit status, client group, significant accomplishments, structure (i.e. board of directors) and size of organization.
- Describe why the project is needed and how you know this. If you can get letters of support or statistics, include them.
- State the short and long-term objectives
- Describe how the project will carry out its goals, how the services will be delivered etc, what time frame is proposed.
- Build in an evaluation component that will give you feedback, i.e. evaluation forms, an objective increase in users etc.
- Describe your financial management system - include auditor's report and current budget proposals. Provide a budget specific to the program or project being proposed. In some cases you want to specify what aspect of the project you want them to fund (tools for the garden project, items for the raffle) or you may want them to contribute as a whole ($5000 to the book project, not just to researching the book).

Include a summary sheet that states:
- your organization's name, address and phone number
- your objectives as an organization
- achievements that demonstrate your credibility
• needs the organization addresses
• activities or programs you provide
• total projected cost of the program
• how much you're requesting from them
• how it fits into their priorities

General tips:
• Don't use acronyms or unfamiliar terms
• Keep the language simple and clear
• Alternate short and long sentences
• Don't waste their time with useless detail. Find out what they want to know and tell them quickly
• Make use of charts and diagrams if it helps explain things faster
• Follow the exact format specified by the agency
• Proofread carefully
• If you say you're going to call, write it down so you remember
• Keep a copy of your proposal and file it
• Plan ahead so you have enough time to write it

The budget

You should always present a balanced budget. Funders want to know that the project has enough integrity and support to function - don't try a "without your support it will all collapse" approach. Income and expenses should always equal themselves, even if you have to list "potential" funders.

Say that you've approached other people for funding and how much you expect to get. This is helpful if you've applied for 3 times the amount of money you need.

Funders always want to know what you are contributing - always include all the related costs to the project. This especially includes volunteer labor, staff supervising time, rent, a portion of your overhead costs, photocopying, phone costs, office supplies etc. Don't inflate your request assuming they'll cut it in half, most funders can spot what's real and what's needed.

Don't ask for an unrealistic wish list, but do add whatever bells and whistles would make your project go along easier. Sometimes it's helpful to describe how your effectiveness, scope etc will be reduced if you get partial funding.

If you ask for unnecessary funding, what will you do if you get it? Remember, more than one group has applied for 17 grant staff and then had to figure out where to put them.

Getting the money

Reporting
Some grant agencies ask for reports on the project when you’re done. Fill these out or they won’t like you. This may manifest itself as their refusal to pay their final installment of the grant, you having to re-pay the money or their decision not to fund you for the next few years. Either way, always write in your grant timelines when you need to file interim and final reports.

It’s a good idea to review what information these reports require, so you can set up systems to keep track of this information during your work.

**Budgets**

Often they also want to see budgets and sometimes receipts of where their money went. Be sure to provide them with this.

**Lying**

It isn’t a good idea to lie to them; you can get in lots of trouble. This happens especially with grants where staff are only being paid minimum wage. Sometimes groups make a deal with the staff people that they can work part-time and get another job. If you end up firing any of those staff people, they could get revenge by telling the granting agency you’re doing this. If your morals require you to pay people a decent salary, it might be worth considering topping up their wages yourself rather than ignoring the conditions of the grant.

If you’ve emphasized different portions of the project to different funders, make sure you haven’t got incompatible images in play. Be honest, if inexact, and don’t make promises you can’t keep.

**Building your expertise**

Every year you’ll get better at writing grants. Keep organized files of the grants you’ve written, how much you’ve received and new places you might be interested in.

**Thank you letters**

Always send thank you letter or notes to every donor of every type and amount. Be prompt, a month is too long to get a letter. Letters make the donor feel appreciated, they know that their contribution has been noticed and was welcome. The letters give your donors a sense of loyalty and good feeling towards the group which helps you keep your donors and increase the size of their gifts.

For people who donate time, either your own volunteers or speakers at a special event, thank you cards also go over very well. In the excitement of counting the money, we tend to overlook the people who’s non-cash contributions made the fundraising happen. Certificates of appreciation and small gifts are very effective at showing how much you value your volunteers.
NATIONAL BICYCLE AND PEDESTRIAN ADVOCACY CAMPAIGN

GRANT APPLICATIONS

NAME Ellen Vanderslice
POSITION Secretary
ORGANIZATION Willamette Pedestrian Coalition
ADDRESS P.O. Box 2252
CITY/STATE/ZIP Portland, Oregon 97208-2252
DATE REQUEST SUBMITTED April 14, 1993

TYPE OF GRANT REQUESTED Growth Grant
AMOUNT REQUESTED $5,000.00
MATCHING FUNDS
TOTAL COST OF PROJECT $5,000.00

SUMMARY OF PROJECT
Conduct a membership drive with the goal of increasing membership from 70 to 350 over a period of one year.

STARTING DATE
May 15, 1993
COMPLETION DATE
May 14, 1994

EVALUATION CRITERIA
(TARGETS/GOALS TO BE MET)
1. Achieve total membership of 350 members.
2. 20% of members to be active volunteers (70 members)
3. Increased visibility in community

PLEASE SUPPLY DETAILED INFORMATION -- INCLUDING COSTS AND A TIMETABLE FOR IMPLEMENTATION -- ON ADDITIONAL PAGES.

7-31
NATIONAL BICYCLE AND PEDESTRIAN ADVOCACY CAMPAIGN
GRANT APPLICATION

SUMMARY OF PROJECT:
Conduct a membership drive with the goal of increasing membership from 70 to 350 over the period of one year.

PROJECT BACKGROUND:
The Willamette Pedestrian Coalition formed in January, 1992, to work for a more friendly pedestrian environment in the Portland, Oregon, metropolitan region. At its inception, the Coalition had fourteen members, and the number of members has now grown to seventy.

While a goal of once again increasing our membership by 500% may seem optimistic, we believe there is a very large population of potential members. The population of the greater Portland region is now approximately 1.4 million persons. If only 5% of these regularly make some trips by walking, there are 70,000 pedestrians in the region. Looked at in this light, our goal of 350 members represents a capture rate of only one-half of one percent, which seems modest.

PROJECT PROPOSAL, COSTS, AND TIMELINE:
The membership drive would be undertaken over the period of one year. The emphasis would be on recruiting active volunteers, with the expectation that approximately 20% of the membership will be active. If the goal of 350 members is reached, that would mean 70 active members. The activities which these volunteers would be expected to undertake include (but are not limited to) the following:

* service on Citizen Advisory Committees for the multitude of transportation and development projects in the region where a pedestrian viewpoint is needed
* testifying at hearings or involving policy and projects which affect the pedestrian environment
* lobbying policy makers and staff (through calls, testimony, writing letters) to change standards and policies which impede progress toward a pedestrian-friendly environment

7-32
• researching and writing up "pedestrian essentials" for use in the newsletter pullouts as proposed in WPC's Minimum Support Grant
• serving as liaisons to other organizations, such as Neighborhood Associations and Community Planning Organizations
• distributing WPC fliers and newsletters to identified locations of free literature display
• making overtures to possible corporate sponsors, and to businesses that might offer discounts to WPC members
• writing grant applications to foundations
• assisting with newsletter activities: writing articles, illustrating, photographing, editing, layout, production, mailing
• designing and producing new membership recruitment brochures
• planning and organizing speakers and topics for quarterly forum events
• staffing booths at events such as walkathons, Earth Day fair, annual Regional Rail Summit, etc.
• outreach to other pedestrian and alternative transportation organizations around the world
• researching and writing up specific examples of good and bad places for pedestrians in the region
• acting as speakers for "Speaker's Bureau", available to speak and give slide shows to other organizations or bureaucrats on pedestrian issues

The activities which would be covered by the grant funding would include the following (dollar amounts are estimates):

• Partial stipend for a part-time outreach and volunteer organizer $2500.00
• Undertaking a direct mail campaign, targeted to neighborhood transportation activists, PTA's and Local School Advisory Committees, Volksmarch groups, and the mailing lists of various environmental and alternative organizations 1000.00
• Advertising (includes "Take One" literature on Tri-Met buses, targeted neighborhood newspaper ads in conjunction with pedestrian press releases, etc.) 900.00
• Producing and printing new and varied membership invitation brochures targeted to different audiences 350.00
• Production of T-shirts and buttons 250.00

Total cost of project: $5000.00

Growth Grant Amount Requested: $5000.00

It is anticipated that the part-time outreach organizer position would be funded for more than the amount quoted through other fund-raising techniques; however, no other funds have been committed at this time.
NATIONAL BICYCLE AND PEDESTRIAN ADVOCACY CAMPAIGN

GRANT APPLICATIONS

NAME        Ellen Vanderslice
POSITION    Secretary
ORGANIZATION Willamette Pedestrian Coalition
ADDRESS     P.O. Box 2252
CITY/STATE/ZIP Portland, Oregon 97208-2252
DATE REQUEST SUBMITTED April 14, 1993

TYPE OF GRANT REQUESTED Minimum Support Grant

AMOUNT REQUESTED $1,000.00

MATCHING FUNDS 952.00

TOTAL COST OF PROJECT $1,952.00

SUMMARY OF PROJECT
Support membership activities, particularly expansion of the
Willamette Pedestrian Coalition newsletter, for a period of one
year.

STARTING DATE
May 1, 1993

COMPLETION DATE
April 30, 1994

EVALUATION CRITERIA
(TARGETS/GOALS TO BE MET)

1. Produce six newsletters with reprintable inserts.
2. At least double Coalition membership.

PLEASE SUPPLY DETAILED INFORMATION -- INCLUDING COSTS AND A
TIMETABLE FOR IMPLEMENTATION -- ON ADDITIONAL PAGES.
NATIONAL BICYCLE AND PEDESTRIAN ADVOCACY CAMPAIGN
GRANT APPLICATION

SUMMARY OF PROJECT:
Support membership activities, particularly expansion of the Willamette Pedestrian Coalition newsletter.

PROJECT PROPOSAL:
Membership activities which would be supported by this grant include:

- Expansion of the scope and distribution of the WPC newsletter, *footnote ($1452.00 – see Appendices A and B)
- Reprinting of membership acquisition brochures ($200 – see Appendix C)
- Post-card notices of meetings to membership ($100.00)
- Copying and postage expenses for letters to prospective members ($100.00)
- Copying and postage expenses for letters to officials, boards, committees, etc. ($50.00)
- Copying of materials for volunteer training and development ($50.00)

Total cost of project: **$1952.00**

Minimum Support Grant Application amount: **$1000.00**.

Willamette Pedestrian Coalition will cover the difference of $952.00 out of membership dues and donations.
APPENDIX A

TO: NATIONAL BICYCLE AND PEDESTRIAN ADVOCACY CAMPAIGN

GRANT APPLICATION FROM WILLAMETTE PEDESTRIAN COALITION

Summary: This appendix briefly describes the past history of the WPC newsletter and lays out the specifics of the current proposal for newsletter expansion.

NEWSLETTER BACKGROUND

Since its inception in January, 1992, the Willamette Pedestrian Coalition has produced and mailed eight issues of its newsletter, *footnote*. For the first issue, 36 copies were printed and mailed. The latest issue had a press run of 350 copies, of which 164 copies were mailed to the membership and interested parties and approximately 175 copies were distributed by other means.

The newsletter has been the principal means for informing the membership about the activities of the Coalition and about ongoing issues of specific interest to pedestrian advocates in the greater Portland region. Copies of some past issues are included in Appendix B to serve as samples of the range of material covered.

The mailing list currently consists of all paying and honorary members of the Coalition, as well as numerous elected officials and transportation staff in the Portland region whose attention to pedestrian issues could be beneficial.

Production and layout of the newsletter is done by volunteers on an Apple Macintosh. Printing has been done to date using photocopy technology on recycled paper. Photographs have been printed directly, without screening. The newsletter has been mailed at first-class rates.

The total cost of producing eight issues of the newsletter, from January 1992 to March 1993, has been $485.96, not including the value of the typesetting donated in-kind. Of that, $333.62 was generated from general membership dues and donations, while $152.34 was direct out-of-pocket donations to the newsletter for printing and recycled paper expenses. The estimated value of the donated typesetting is $770.00.
PROPOSED NEWSLETTER EXPANSION

It is proposed to expand the scope of the newsletter by adding a "pull-out" section to each issue. Each pull-out would cover a "Pedestrian Essential", such as building orientation to the street, separation of sidewalks from the curb, and so on.

It is also proposed to expand the circulation of the Willamette Pedestrian Coalition newsletter to approximately 750. This figure has been selected as an average over the twelve month period of the project. The mailing list will be expanded to at least 300 through membership growth and through the addition of Neighborhood Associations in Portland and Community Planning Organizations through the rest of the metropolitan region. The remaining 450 copies will be distributed by hand to targeted locations where displays of such literature are permitted.

It is proposed to produce six issues of the newsletter in the next twelve month period. Three issues would be 4-page and three issues would be 6-page. Layout and design would continue to be done on a volunteer, in-kind donation basis.

The cost of producing 750 copies of each issue, using offset printing on recycled paper, and including some screening of photographs, would be approximately $180.00 for each six-page issue and $130.00 for each four-page issue. Total cost for the proposed six issues would be $930.00.

Mailing costs, continuing to use first-class rates, would be $522.00.

Total cost of the newsletter for one year: **$1452.00**
April 26, 1993

Ellen Vanderslice
Willamette Pedestrian Coalition
P.O. Box 2252
Portland, Ore. 97208

Dear Ellen:

I am pleased to inform you that we have decided to award the Willamette Pedestrian Coalition two grants totaling $6,000 as part of our National Bicycle and Pedestrian Advocacy Campaign.

Your two proposals, for a membership development campaign and newsletter support, are very much in line with the goals of the campaign.

The targets you have set for the membership development proposal are quite ambitious -- especially with such a high level of active members. We would encourage you to talk with Charlie Gandy at the Texas Bicycle Coalition to discuss membership acquisition efforts and volunteer recruitment -- (512) 476-7433.

You should also know that we are treating your membership drive as something of a model and experiment from which we hope to learn lessons for years two and three of our national campaign. There are very few active pedestrian advocacy groups in the U.S., as I am sure you know, and we are anxious to see what it will take to change that.

Please sign a copy of this letter and return it to us as soon as possible. We will then send a check to Conservation Resources for the appropriate amount.

Congratulations, and good luck with this important project.

Bill Wilkinson
Executive Director 4/26/93

Ellen Vanderslice
Willamette Ped. Coalition 5/1/93
National Bicycle and Pedestrian Advocacy Campaign
Interim Grant Report

Summary of Project: Growth Grant to conduct a membership drive

Amount: $5000.00

1. What goals stated in your proposal have been met with the grant?
   We have (within this month) hired a part-time outreach and volunteer coordinator. We have also increased our visibility in the community. One measure of this is that for a recent article in The Oregonian the reporter knew enough to contact our president for a quote.

2. What goals stated in your proposal have you made progress on?
   We have increased our membership so far by about 125%, and have maintained an active member ratio of about 20% of the current membership.

3. What elements have you not completed?
   We have not yet undertaken the bulk of this project. The project has been under the management of our Membership Growth Committee, and they have chosen to put the direct mail campaign and the advertising campaign on hold until we filled the position of part-time staff person. As we have just hired someone, we now hope to have a burst of activity on this project.

4. What results have you achieved that were unexpected or unplanned?
   We expected that there would be no shortage of people willing to work on spending this money, but it has turned out to be just as hard to get volunteers to work on the projects that have money to spend as on other projects.

5. Based on you original proposal, are there projects that are or will be considered failures?
   We are not quite sure that we'll be able to meet our ambitious membership goals, especially the goal of having so many active members. However, we are still optimistic about what can be done in the remaining eight months of the grant.

6. If you have money left over, how would you like to change your original grant proposal to take advantage of new opportunities?
   Now that we have a competent staff person, it would be great to be able to pay for more of his time.
National Bicycle and Pedestrian Advocacy Campaign Interim Grant Report

Summary of Project: Minimum Support Grant for expansion of newsletter and other membership activities

Amount: $1000.00

1. What goals stated in your proposal have been met with the grant?
   A new insert publication, a pedestrian issues paper, has been developed. The newsletter and issues paper are being printed rather than copied.

2. What goals stated in your proposal have you made progress on?
   To date two issues of the insert have been published, along with three issues of the regular newsletter. Both the scope and the distribution of the newsletter have been expanded. The circulation of the newsletter has been expanded to about 500 so far.

3. What elements have you not completed?
   We are still in the process of expanding the mailing list to the target 300; we are currently at about 260. We have four more Walk•Ways planned and No. 3 is now in process.

4. What results have you achieved that were unexpected or unplanned?
   After our most recent Walk•Ways, on Crossing the Street, we received some requests from other parts of the country for reproducibles so our paper could be reprinted.

5. Based on your original proposal, are there projects that are or will be considered failures?
   No. We have had the most difficulty with expanding the hand distribution of newsletters to targeted locations by volunteers, but that is partly because of the lag in retaining a part-time outreach and volunteer coordinator under our other grant.

6. If you have money left over, how would you like to change your original grant proposal to take advantage of new opportunities?
   We don't anticipate having any money left over from this grant, as the initial grant amount did not cover the costs of the project.
POWER AND DIVERSITY

by Regan McClure

Definitions

Census - information about the population that's collected by the government that can tell you the languages spoken in your area, age ranges, cultural background, income, race and much more about the people in your community.

Conflict of interest - when someone uses their power, officially or unofficially, to influence the group's activities in a way that will benefit them personally.

Focus group - a small group representing a particular community that will help provide information about your group's relationships to their community.

Needs assessment - a survey or series of interviews that assesses the needs of your group, your clients, members, volunteers, staff etc. It also identifies what needs are currently being met and what needs are not being met, and makes suggestions for improvement.

Outreach - another word for communication. It implies an awareness of an inner circle, the norm already established within the group. This inner group must learn to "reach out" to become more diverse.

The need for diversity

Ask yourself these questions:

- Does everyone who has (or could have) an interest in your group know about what you do?
- Do the people in your group represent the people that you serve or speak for?
- Does everyone who gets involved in your group participate equally?
- Do you meet the needs or provide services that are equally useful and needed by everyone you should be serving?
- Does everyone in your group feel comfortable with your group's structure, activities and policies?

It would be unusual for any group to say yes to all these questions. Many groups haven't even thought about asking them to begin with. It's important to consider these issues because small groups often repeat the same structures, assumptions and mistakes that are made in society at large.
We come together in groups because they're so powerful - we can accomplish more than if we worked on our own. However, our personal prejudices can take on new power as we enforce them by developing policy, claiming to speak on behalf of a community, developing hiring qualifications and creating an informal group culture.

Not having diversity in your group can limit your effectiveness and understanding of the issues you're working on. For example, if no one in your group is Portuguese, you may not know about the big Portuguese community centre just down the street. Even if you've seen it, you aren't as likely to develop any networks with it because it's unfamiliar to you.

We bring valuable personal experiences to a group - that's probably why we get involved. If everyone in the group shares those experiences, working in the group comes quickly and easily - we all agree on some basic things. This comfort comes from the power of getting together and sharing our experiences; but it also comes from our shared assumptions. What happens when those shared experiences don't reflect our community? What happens if our assumptions exclude people from our organization? The barriers we set up may be invisible to us from the inside - but they are very effective at keeping people out.

Working with power and diversity is an ongoing task because power structures are always being reinforced by society. There are a number of steps your group can go through to be more welcoming and fair, but it's important to remember that it isn't something you do once, get perfect and forget about! It's an ongoing process.

**Assessing where you stand**

**Defining your community**

Define your community by asking yourself, who are the people who share your issues, concerns and needs? For example, if your group is working on a bike lane on your street, your community might be the people on the street, local businesses and other groups who are working on bikes in their neighbourhood. There may are there people who might use your street but not live in your area. they could part of your community too.

Does your community expand beyond the city? The province? If you end up defining a whole city - try and look at the different sections of the city - what do you know about the people who live there? Is it possible that their concerns might be different? What would you like to learn about them?

Are there other groups that face the same problems? Are there potential allies that you could work with?
Does your community relate to a specific area? If so, get the census information about the people in that area. It will probably be quite eye-opening. You may even want to do some research yourself, for example, stand along your bike lane route and ask people who ride past where they're from and where they're going.

Looking for who's missing - how well does your group reflect your community?

Compare the representation of people already involved in your organization with what you might expect it to be statistically - based on your census survey or other forms of research. You can also compare it to your goals - for example, if you want to work on behalf of youth, you may want to have a higher-than-average proportion of youth in your organization.

Activity

Get a map of the city. Have all your volunteers dot where they live. Make dots of the other groups you have connections with - what's your "mental map" of familiar spots? What patterns do you see?

Assessing your resources

Take an inventory of:

1. Your physical space
   - is it wheelchair accessible?
   - is it an intimidating building?
   - if you have meetings at night, is it in a safe area?
   - is it in a prominent place in the community?
   - is it easy to find?
   - what kind of atmosphere does your office have?
   - what groups and people do you share your space and/or resources with? are there resources you could offer other community groups?
   - is it easy to find things in your office space?
   - is it in a private home?
   - look at the posters on the walls of your office? what races, genders and cultures are represented?

2. Your printed materials
   - who are they written for?
   - who would understand them best? who would identify with them best?
   - do they have a lot of difficult words, acronyms (eg. TCCC, TO, CBN) or jargon (eg. sustainable transportation, traffic calming) that need explanation?
   - what languages are they in?
   - what images are represented?
3. Group norms (that got established when no one was looking)
   - do you assume everyone who volunteers has a computer?
   - do you assume everyone knows how to facilitate a meeting?
   - do you meet at a time that's convenient for parents?
   - do you provide TTC tokens for people who can't afford travels costs to come to your meetings?
   - is everyone equally informed about what's happening in your organization?
   - can people take on a variety of roles and duties in your organization? do you provide training and opportunities for people to learn new skills and take on new roles?
   - where do you go for drinks or coffee after a meeting - an expensive restaurant, a heterosexual bar?

**Taking the next steps**

There are probably some obvious gaps in your group, most groups have them. If this happens, the next step is to figure out why your groups lacks diversity and how you can change.

1. **Identify what you want to learn**

Create a set of questions that you'd like to know. These may be questions like:

What concerns would a TTC user who lives in Scarborough have that would be different that a TTC user who lives in the Annex?

What proportion of the people in our area would be more comfortable reading our pamphlet in a language other than English?

How many youth in our area are unemployed and are they interested in our programs?

If one third of the people in our area are Chinese, why is there no one in our group who's Chinese?

2. **Get input and feedback**

You might think the next step would be to figure out answers to these questions. However, it's actually easier, and more accurate, to ask. Communicating with people who aren't involved in your organization is very important - especially if you want to be an open, dynamic group that represents your community.

The answers you get will often be surprising - that's why it's so important to ask these questions. For example, there was a university Women’s Centre where most of the volunteers were white. However, it was clear that over 45% of the population in the community were people of colour. Originally, the Centre felt that maybe feminism's reputation as a “white dyke" thing was keeping women of colour away. However, after surveying volunteers, they found out that they were recruiting volunteers through Women's Studies programs. This had seemed logical, but in fact, it was just convenience.
Although they sent a newsletter to many places, they only followed up with in-class talks for Women's Studies, where the classes were mostly white. These classes were chosen because volunteers already involved with the Centre were in Women's Studies, so it was easy to make a class presentation. This personal contact of talking in class was the most effective outreach. When the Centre made an effort to do this type of recruiting in a wider variety of faculties, the Centre and its programs began to represent the university population far more accurately.

Part of welcoming new people and being willing to share power is the realization that they will bring many skills and experiences with them that you aren't aware of. Diverse involvement will change your organization - you will be more responsive to your community. This can be unpleasant for people because it means giving up power in "your" organization. The priorities and energies of the group will change, and you might find yourself missing the comfortable feeling of being in the majority. However, being aware of the need for diversity and your responsibility to pursue it will make the process of outreach easier.

**Steps to reach out to a community**

Go to the source for your information - the community itself. Ask representatives of a community you want to reach to give you feedback and information about how your group looks from the outside.

Make a survey about your group (have people heard about you, what do they think you do, what would they like to see?) You can ask people on the street to fill out the survey, dropping off surveys at key locations and events or even do a door-to-door survey.

Have a meeting with members of other community organizations. They will have helpful knowledge. This may also be a good first step to working together on common issues.

Hold a small group meeting (often called a "focus group") where you ask people from that community about what they think about your group and how it can meet their needs. A focus group assumes that if you ask 10 people questions, you'll get similar answers to asking 100 people, but you'll get the answers faster. You can see if people in your group know anyone you could ask, or you could take an ad out in the paper. It's customary to at least provide free food and TTC tokens in exchange for the information. If you place an ad, paying about $20 to $40 for a two hour interview is standard. You need about 4 to 8 people for a focus group, and you can have several groups that represent different communities (for example, if you want to hear what young mothers, business people or students think about your organization, you could arrange a small group meeting for each of those groups).

**Steps for getting feedback from your members**

You can also get feedback about the experience of people within your organization. In particular, you may want to ask for their experience about:
1. Levels of power and divisions within the group

Quite often, there's a lot of diversity within the organization, but the people in power are all the same and the people who aren't in power are all the same. For example, all the men work on one aspect of the group, all the women are involved in something else. Another example is youth who work on events, but never get training in administration. Or perhaps, all your program trainees are working class, but all the trainers have university degrees.

2. People who don't stay involved with your group

It's very important to get the feedback from people who were interested but left fairly quickly?

Were they put off by your group or are they just busy?

3. The location of power

Is there a core group of people who make all the decisions and attend all the meetings?

Are your meetings in a public space at regular times?

How easy is it to find out where a meeting is being held? Do you need to be invited (this doesn't refer to policy, but casual practices, for example, only some people are reminded about the meeting)?

Who does the inviting?

Who gets invited?

You can use a survey, focus group, volunteer meeting or other way to find out the answer to these and other questions you might have. If you suspect that people might want to make negative comments, you may want to provide an opportunity for people to respond privately, such as using a survey with no names attached to the responses.

3. Working in Partnerships

Partnerships with other community organizations lets you share your networks to help you market joint-produced material, accurately identify the concerns of your communities and establish credibility for your groups.

Sometimes that partnership takes the form of one person who is a member of both groups. However, the partnership is likely to last longer and have a bigger impact on both groups if it's a more formalized arrangement, that involves several people in both groups meeting with each other and working together on joint programs.

It's good to begin outreach with another community group because it makes you think:

- what do we want?
- what can we offer?
• what do they want?
• what can they offer?

Two groups working in partnership have a better balance of power than a single individual working from inside a group. Your partnerships can also help you recruit more diverse members as you establish credibility in diverse communities, and give new volunteers from those communities an indication that your group is open to dealing with these issues.

It is important that every group participates equally in your partnership. Sometimes one group will dominate a "partnership" because they have staff or resources and other groups don't, or because they really just want other groups to support their programs and don't listen to their partner groups. Make sure that the goals of the partnership are clear and that each participant has an opportunity to give ideas, make decisions and share control of the partnership.

4. Staff

Staff are a core element in creating the culture and personality of an organization. Having diversity among your staff will help your efforts for outreach on a daily basis. Having an open hiring policy is essential for bringing new people into your organization - even for short term work, many people will get involved through paid work and stay to volunteer. To maximize diversity on your staff:

a) eliminate unnecessary barriers from the requirements for job openings (for example, instead of asking for a university degree ask for related experience in a given field, either through formal education, paid work or volunteer work).

b) add your outreach goals as part of the criteria for all jobs. For example, you can ask for familiarity and experience working with the Caribbean community, or Spanish as a second language. These skills are newly identified assets to your organization. Don't just make a single, short-term job to deal with these issues, change the priorities throughout your organization.

c) make sure all positions are widely advertised, including several community papers.

d) don't hire in a rush. Leave plenty of time to advertise, interview and make a decision. Ideally, if you don't find a suitable candidate, you should have time to re-open the hiring process and try again.

However, being a staff person is not always a position of power. It is also important that:

a) staff people's skills and contributions in creating diversity is an important aspect of their job description. Don't ask them to take on work that you benefit from (i.e. involvement with other community groups) for free. For example, if they attend meetings to network for you, that should be part of their work time.

b) staff expertise, opinions and ideas for programming, policies and other changes are solicited, respected and (in most cases) followed.
c) include your staff people in meetings and decisions.

d) don't ask your staff to represent everyone in "their" community or establish credibility for your group. Your staff person is just one aspect of your overall strategy.

5. Consultants

Don't rely on your own skills to figure out how you're doing. This is new territory for you, and it's hard to see what's happening when you're on the inside. Invite outsiders to come and do workshops, interview people or analyze your group and make a report. This will give you some objective feedback about your group and help focus and sustain your efforts over the long term.

6. Education

Often, affirmative action programs have run into problems because the management decides that they will hire a quota of people, and then leave them to deal with the negative reactions of their co-workers. Making a single change to promote diversity without providing support to sustain it will create a stressful atmosphere for everyone involved.

It's important that people in your group understand why it's important to become more diverse and are open to having changes suggested without becoming defensive.

Try to:

- prepare people for change and ask them participate in it. From redecorating the office to mailing out your first newsletter, everyone can be involved in helping your organization grow.
- promote the changes as positive. Explain what you're trying to accomplish and why.
- provide opportunities for people to express their doubts and concerns about the changes taking place. Try and identify if there are steps you can take to respond to their needs.

7. Changing your membership

By changing your programming, your reputation and your publicity, you will:

a) attract more diverse members
b) keep members involved
c) have more diverse representation at all levels of your organization

It's important to not put a lot of pressure on new members to represent "their" community, take on complex tasks or work on things they aren't really interested in. For example, even if your group if working on outreach to lesbian communities, don't pressure your sole lesbian member to take on this work if she actually wants to do the finances. It's unfair to force your priorities on someone this way. Have faith that there will be other people who are interested in doing this work.
Newsflash from the other side - being the only one in the room.

The other sections of this article are largely written for people in a position of power. However, there are some useful strategies for people who are in a minority position.

Set some goals. What would you like to see out of your work? What's your time limit? Are there people who would be willing to help you achieve your goals?

Go in with backup. The easiest position is if you are a representative from another group which will back you up. If you aren't perhaps you'd like to join one. It can be hard to try and get two groups to work together when you don't feel membership in either of them. Try and make a place for yourself in one group before you agree to be a bridge to the other.

Make sure you have allies. Make sure that some people in the group want you there, or bring your friends. Don't try to do everything by yourself.

Assess how willing you are to work in this difficult position. Even if everyone in the group has great intentions, the odds are high that you'll be offended, hurt, frightened or angry. Do you have the support you need to be happy in the group? If you think you'll always be miserable there, leave - let someone else do the work. Your own health and happiness are important.

Try to avoid speaking "on behalf of" your community. You will undoubtedly be asked to at times; but you do not, and can not, represent your entire community. The role may be tempting, because it offers a fragile power; and/or offensive, because it will remind you of how alone you are in the group. Speak for yourself, or the organizing you represent and encourage the group to continue with outreach if they want to know more.

Bring in outside expertise. Some information is best heard when it comes from outside sources. People might not listen to some comments when they come from you, or you might not like the role that you take on when you do this. Make sure the group is willing to hire outside facilitators for visioning meetings, mediators to settle ongoing disputes and workshop leaders to educate about issues of diversity and power. This lets you participate in the group without trying to be the "watchdog" who initiates the process of self-evaluation and change.

8. Changing the way your group does things

Public image

Think about your strategies for communicating with people within and outside your group. If your group isn't reaching a wide diversity of people, it may be your public image. Think about all the ways you reach the public - newspaper listings, flyers, newsletters, public speaks, events, personal contact. Personal contact and appearances are more effective that mass media strategies. If possible, find out what methods are working best for you right now. You can ask, for example:

- Where do your volunteers find out about you?
• What groups have heard about you?
• Who do you define as an ally?

Do people in your group attend the meetings of other groups? Which ones? This is a powerful form of networking. Are there other groups you might want to set up this relationship with?

What's your reputation in different communities? (Some groups might work closely with you, others might never have heard of you).

Are there existing opportunities for outreach that are underused?

Are your materials translated? However, there isn't much point in translating your brochure into different languages unless you have people who can answer phone calls and questions in those languages. Work in coalition with other multi-lingual community groups to starting working in different languages.

**Changing policies and priorities**

Your policies will come to reflect the more diverse needs of the communities you serve or represent. This change will come through:
  a) sharing decision-making power
  b) asking for community input into your activities and goals
  c) listening to criticisms and praise about your group
  d) following through on your commitments

**Common problems**

1. Power struggles

Some of things you discover in this process may make you angry, or feel stupid or ashamed of your past mistakes. It can be difficult to be criticized about a group that you've spent a lot of time on. It can be hard to watch a group change when you were comfortable with it the way it was. It can even be difficult to recognize that these feelings are part of losing control when you believe that you weren't in a position of power anyway.

Power struggles often come up when people are trying to protect their position of power. There can be many forms of power - employment, a position of status, respect from their peers, or control over the group itself. People often don't recognize that they actually engaging in a power struggle, instead they think "...that new person don't know what they're doing. I'm not going to let them destroy everything I've worked to build" or "...I've put years into this program, I don't see why i'm being forced out now." These feelings will come out someplace, make sure that you have some way to watch for and deal with them.

Try to:
  • identify this process as a power struggle.
• identify the issues and fears that the changes in the group have raised.
• recognize and be honest about the challenges you face.
• acknowledge what your power was and what you're losing. Make plans to deal with this loss that help you make the transition.
• express your doubts without letting them simmer.
• identify any conflicts of interest and make plans to avoid them.
• have a meeting once a year to evaluate the diversity and power relations in your group.
• have regular workshops or training programs that address these issues.

2. Credibility of your efforts

Having a good reputation in many diverse communities can be a real asset in your work. Unfortunately, some groups end up using their members or coalitions to enhance their credibility and give nothing in return. Sometimes, this happens in coalitions where one group controls all the staff and resources, and makes all the decisions, and the other groups are just expected to put their name on the poster. Sometimes, individual volunteers within a group are asked to be a token representative, taking on media work, networking or other roles that they aren't comfortable with or interested in doing. Be honest when you are looking for credibility. Then think about what you're going to offer in exchange for that (training, access to resources, real decision-making power).

3. Working in isolation

Meeting people is an important aspects of paid work and volunteering. It can be hard to be working in isolation in a group. For example, you may be working closely with people with disabilities on transportation issues. However, if 10% of the population is disabled and you have ten people in your group, it would be hard for just one person to represent the needs and issues of all disabled people. It's a lot of pressure to be asked to speak on behalf of a very large and diverse group of people. In these cases, the group would want to have several people with disabilities in your group giving input, regardless of the proportion of people with disabilities in the general population.

4. Neutral is not the same as friendly

Some groups try to be neutral. They put a lot of work into removing signs of their identity, for example, they use cartoons instead of photos on their pamphlets that are meant to be gender and racially neutral or they have a gender neutral language policy. Unfortunately, being neutral or generic is not the same as deliberately welcoming diversity. As pamphlet that is designed to not be offensive to First Nations communities will not get the same positive response as a pamphlet that directly speaks to First Nations people.

5. Factional fighting

Organizational change is often a chaotic process. What many new members in a group encounter is an internal battle in process -one group of people within the organization are
fighting for change while another group likes things the way they are. This kind of fighting drives away new people, can be very disruptive to your group. It's important to make sure that everyone understands the need for change, is educated about the process and has a chance to express their concerns about it. Try and heal these divisions as you make changes; this will lay the groundwork for further positive growth.

6. Increased workload

Doing things for the first time is very time consuming - there's a lot to learn. If you make a lot of changes in your group, you will find yourself experiencing a rapid increase in work. Much of this is the initial effort of learning new ways of doing things. Over time, welcoming and sustaining diversity will become second nature. In the short term, it can be useful to:

a) hire consultants or grant staff to undertake new projects, but don't isolate them in the organization!
b) recruit more members
c) share the workload by working in partnerships with other groups
d) be patient if the results of your work seem to come more slowly than you would like.e) don't take on more than you can handle. Take a long term perspective and pace yourself.

Bibliography

Bolton, R. People Skills: How to Assert Yourself, Listen to Others and Resolve Conflicts, Toronto (Simon and Schuster). Clear and practical guide to topics listed in title.

Bush and Folger. The Promise of Mediation: Responding to Conflict Through Empowerment and Recognition (Jossey-Bass). Outlines an approach to mediation that de-emphasizes simple achievement of a settlement and emphasizes disputant self-determination and the development of their capacity to relate to one another.


Macbeth, Fiona and Nic Fine. *Playing with Fire: Creative Conflict Resolution for Young Adults* (New Society Publishing). Excellent guide for anyone working in groups (with adults too), useful exercises.


Fundraising Internet Links & Resources of Interest to Nonprofits:

http://www.nonprofits.org/npofaq/misc/990804olfr.html
This FAQ's long list of websites that offer fundraising support and services of various kinds -- charity malls, donations processors, special event and membership processing, etc., etc. There's also list of other websites with discussions and analysis of this rapidly growing category of resources.

http://www.cof.org
Council on Foundations with links to many foundations and general information on foundations and giving.

http://fdncenter.org/
The Foundation Center which links to foundation and corporate sites of interest to fund raisers, general information on foundations and giving.

http://www.tgci.com/
The Grantsmanship Center which links to foundation and corporate sites of interest to fund raisers, and has general information on fund raising. (1099)

http://www.fund-online.com/
This Online Fundraising Resources Center is the work of Adam Corson-Finnerty and Laura Blanchard, Department of Development and External Affairs, University of Pennsylvania Library. It contains excerpts from their book, Fundraising and Friend-Raising on the Web, now available from ALA Editions. It also includes teaching materials from classes and presentations.

http://www.charityweb.net/
CharityWeb is an e-commerce ASP for charities. Charities using the service can accept donations, sell their own items, and offer event registration from their Website without having to install, maintain, and customize all the software on their own servers.