Community Action Resources
for Inuit, Métis and First Nations

Assessing Needs

Planning

Evaluating

Toolbox

Finding Resources

Making it Happen

Finding Resources

Canada

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INTRODUCTION TO THE KIT

When asked "What is a community?", Aboriginal people often answer "A community is a group of people sharing and caring."

This series of manuals is about just that: sharing information and skills to empower people so they can better care for their communities.

Training in community development and program evaluation has been identified by Health Canada and by national Aboriginal organizations as a priority need.

In order to fulfil this need, training workshops were offered between 1993 and 1995 to approximately 300 Aboriginal people across Canada, most of them front-line health workers. The training was based on a generic package of resources on health promotion and community development called the *Community Action Pack*.

Experience and feedback received from the participants during the workshops and after they returned to their communities led to the development of this new kit.

Community Action Resources for Inuit, Métis and First Nations was developed specifically for Aboriginal people, taking into consideration their values, culture and way of life.

This kit is a self-help tool for Aboriginal people who want to get a community development project off the ground.

The series of six manuals contains information, tips, examples and ready-to-use charts that you can copy and use for yourself or to train others in your community. It is intended to be user-friendly, emphasizing questions such as what, why, when and how to accomplish the different steps of a community development project.

Community Action Resources for Inuit, Métis and First Nations uses a holistic approach, taking into consideration community development know-how and context as well as the human aspects that are part of the entire process.

Look for the following symbols.
They will help you apply your skills
and knowledge.

tips

examples
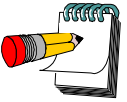
exercises

What is a community?

Let's take a moment to think about the word "community". Communities are not just a question of geography. People in a volley-ball league can be a community. A support group can be a community. Members of a church can be a community. Communities are people with something in common, something that is important to them. The members of a community depend on each other as they work together to accomplish challenging tasks. A community can be seen as a group of people:

- living in the same geographical area;
- sharing the same culture;
- with a common interest or concern; or
- with a shared sense of identity.

Add to or comment on this definition. What is a community to you?
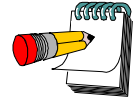
Community development: making communities healthier

The World Health Organization and Health Canada have defined health as more than the absence of illness and disease. Health is a sense or state of physical, emotional and psychological well-being. Health is an individual or group's ability to reach goals, to satisfy needs, and to cope with or change their environment. In a community context, it is the ability of a community to sustain itself in a caring and fulfilling way. In other words, health means looking after ourselves and others. It is promoted through having access to services appropriate to our needs. It is enhanced by living in a clean environment and by a spirit of community (feeling part of a group of people who care about each other).

This means that groups that are concerned with the kind of housing available in their community, reducing violence, developing the local economy or starting a self-help group for bereaved parents can be seen as improving and promoting the health of their community.

A step-by-step process

Is there a secret to turning a good idea into a successful project? Actually, there is no secret. Groups follow different paths to action, yet experience shows that successful efforts use some "tried and true" steps.

Most groups go through the steps of identifying needs, planning activities, finding volunteers and funding, evaluating and helping people work together through the normal ups and downs of an activity. *Community Action Resources for Inuit, Métis and First Nations* is built around these steps.

Starting a new activity is like planning a trip to a place you have never been.

Just as you need a map for your trip, you also need a map for your community activity. This map will help you figure out where you are, what has been accomplished, and point out what still needs to be done.

The following diagram is your map to the steps for community action that is described in *Community Action Resources for Inuit, Métis and First Nations*. Each circle represents a step in the process of developing an activity.

The interpersonal aspects of community action and the techniques needed to carry out a project, such as taking minutes in meetings, have been gathered together in the "Toolbox". This circle has been placed in the middle of the diagram because the "Toolbox" can be useful in all steps of the process.

ASSESSING
NEEDS

EVALUATING

TOOLBOX

PLANNING

MAKING IT
HAPPEN

FINDING
RESOURCES
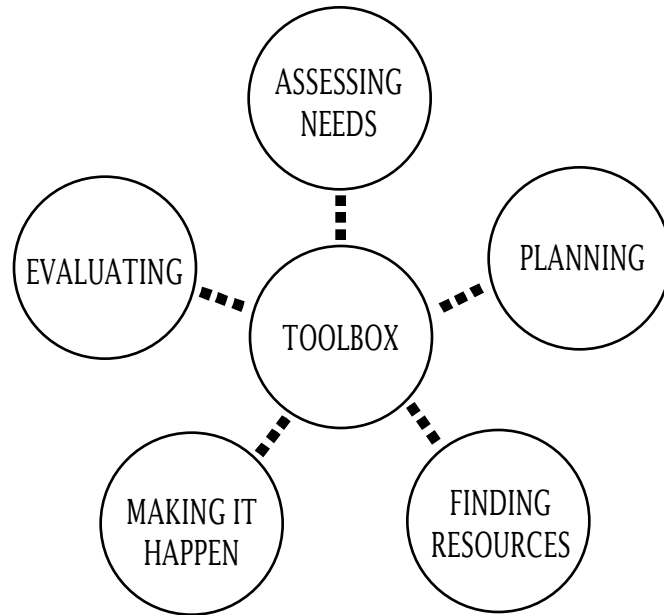
It is important to remember that every group follows its own path, which may be different from the one shown here. There is no absolute "right" way of doing things. You need to go with what works best for you.

The process described in *Community Action Resources for Inuit, Métis and First Nations* is intended to help you plan activities, not to tell you what to do. The diagram is like a map and you can take as many side trips as you like. There are no rules!

I. INTRODUCTION TO FINDING RESOURCES

Toward social change

You know what you want to accomplish. You have planned how to achieve your goals. Now you must face the challenge of finding the necessary resources to make your plan happen.

People are often reluctant to find the money or volunteers they need for their project. Yet they should be proud of their work because the money they find will finance social change. The volunteers constitute the very soul of this change.

The resources that you manage to find will help make this world a better place. They will improve the well-being of your community by giving you the means to take preventive action. Volunteer work is becoming a necessary complement to government action.

So do not be uncomfortable or timid. Prepare yourself to search for resources with pride and conviction because what you are doing is useful. Believe in yourself and in your group.

You have decided to become involved and to actively find solutions for the people in your community: well done. This manual can help you begin.

A holistic and structured process

If you have ever had to find money or volunteers before, you probably have only one idea about it: "I hate it! It's always the same people who answer our call for help and I'm tired of bothering them."

Most people react in the same way. Finding resources often requires a lot of tact, effort and perseverance. The results do not always meet your expectations. You can get discouraged when things do not go well.

An organization does not become dynamic spontaneously. It requires good planning and coordination of resources. Healthy organizations know how to create circumstances that facilitate the beneficial use of resources, both for its members and the organization as a whole.

This manual will therefore present a global and structured process for finding resources. It will focus on human resources such as volunteers, and material resources such as money, materials and services.

Training goals

With this section, you will learn tips and ways of doing things so you feel more comfortable when you look for resources, whether they be money or volunteers.

The training will also focus on responding to the needs of volunteers. This generally means they stay with the organization as long as possible for their own benefit and for the benefit of the organization and the community.

Training objectives

At the end of the training, you will be able to:

- understand the importance of planning how to find the resources you need for your project;

- plan and establish a volunteer program in your organization;

- take the needs of volunteers into account;

- assess your funding needs;

- plan how you will acquire the resources you need (money, materials and services);

- use appropriate techniques and tools to obtain these resources; and

- feel more comfortable in finding resources for your project.

This manual

This manual contains material that is easy to use and reproduce. The working tools can be easily adapted to your organization's needs. Do not hesitate to choose the most pertinent ones and to modify them to your own liking and to your specific circumstances.

II. WHAT DOES FINDING RESOURCES MEAN?

Finding resources is the process of identifying and obtaining resources in order for your organization to fulfil its mission and objectives according to an established action plan.

It consists of coordinating potential volunteers with the organization's tasks or, in other words, matching people with needs.

Various types of resources

When you mention finding resources, most people automatically think of large-scale fundraising or diverse grant applications associated with various ministries and foundations.

Yet organizations need other types of resources besides money to function properly. These include:

- time and effort invested by volunteers;

- volunteers' specific and unique skills;

- use of services, such as plane tickets donated by airline companies or free use of a hall to hold activities; and

- material, such as information pamphlets, guides or films produced by governments or private companies.

Can you think of other types of resources your organization may need to function properly?

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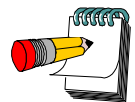
III. WHY FIND RESOURCES?

It is possible but unlikely that volunteers will come to you. Volunteers do not crowd your doorstep and money does not fall from the sky. That is why you need to establish an ongoing plan for finding resources that takes advantage of opportune situations: a favourable time of the year, a special event in the community, the announcement of a new funding program, etc.

Obstacles

Although finding resources is essential for running your organization, it presents some obstacles. Here are several reasons why people sometimes avoid activities that involve recruiting volunteers or finding money:

- the activities are not properly planned;

- volunteer organizations are underfunded;

- organizations are sometimes dependent on the willingness of sponsors;

- fear of being rejected; and

- feeling like you are bothering people.

JIVA is a community organization that aims to help young people start their own businesses. Based on volunteers with few resources, JIVA has trouble doing a good job. The volunteers do what they can, but they have to deal with a lack of equipment. As a result, precious volunteer time is wasted running errands instead of dealing with clients.

This means the organization is not very productive and the desired results cannot be obtained.

Since few businesses have been created, it is difficult to justify the importance of the organization when it's time to request funding. This weakens the funding request, and the organization does not obtain the grants it needs to buy equipment...and the vicious circle continues.

Examples to help you understand
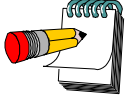
Are the people in your organization reluctant to recruit volunteers or collect money?

Why do you think they are reluctant?

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Do you think it is possible to change this situation in your organization? If yes, how?

The work you do is very important, so do not be discouraged by all of these obstacles. Finding resources is essential because your organization needs volunteers, services, skills, office, dollars, and all other resources to fulfil its mission and make a difference in your environment.

Being proud and convinced

Finding resources is difficult and usually doesn't work at the first try.

The public used to associate fundraising with what it considered panhandling non-profit organizations. This is not the reality.

People who have already tried know it is difficult to belong to non-profit organizations. They face a lot of uncertainty, complexity, differences and conflicts with very few resources. So people should feel proud to be doing this kind of work. They must be convinced that finding resources is not a personal desire to bother others, but an extremely important exercise for the whole community.

IV. HOW TO FIND HUMAN RESOURCES: VOLUNTEERS

Profile of volunteers and their needs

Despite what a lot of people think, money isn't everything. A group of responsible people putting their diverse talents to use constitutes an organization's most important resource.

Volunteers donate their time, energy and skills to a project, without being paid. They are the men and women who work within an organization. They have skills, interests and talents which benefit the organization. As a result, volunteer work can be the very heart of an organization.

There are almost as many reasons to volunteer as there are people. Every person has needs to satisfy, and a volunteer is no exception. A well-known psychologist, Abraham Maslow, has determined different types of needs*:

• physiological needs, like drinking, eating and sleeping;

• the need for material and psychological security;

• the need to belong to a group, to interact with other people;

• the need for self-esteem, to love and be loved for what we are and what we do; and

• the need to self-actualize, to feel that we are capable of accomplishing something worthwhile.

The need for spirituality should not be omitted from this list.

People who manage volunteers recognize that volunteer work generally meets the following three needs:

• the need to belong;

• the need for self-esteem; and

• the need to achieve.

An organization seeking to recruit and keep volunteers would therefore benefit from taking these needs into account.

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* SOURCE: *Le recrutement et la motivation des bénévoles*, Conseil des loisirs - Région de Québec, 1984 (Reprinted 1991), Sainte-Foy, Québec.
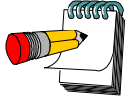
These needs can be expressed on a daily basis through volunteers' diverse types of expectations.

Consider, for example, the need to meet and exchange with other people.

Can you think of other reasons why people volunteer other than to meet the needs of belonging, self-esteem and fulfilment?

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Here are some examples of volunteers' needs:

- to identify with the organization's philosophy;

- to show appreciation for past services;

- to exercise a spirit of community involvement and mutual aid;

- to help others;

- to obtain status and recognition;

- to have responsibility and have influence;

- to put aptitudes and special knowledge to use;

- to feel useful during leisure time;

- to learn and contribute to personal development;

- to accomplish valuable tasks;

- to acquire experience in the job market;

- to meet challenges;

- to commit oneself to a cause;

- to give meaning to life; and

- to take part in community activities.

Even if they are not aware of it, people become volunteers because they believe it will be an interesting experience. The best way to ensure they remain committed is to understand their motivation and offer them a job that can fulfil their needs.

A motivated volunteer, for example, can drive people who do not have cars so they can participate in activities.
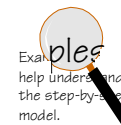
Do you think your organization is sensitive to the specific needs of each volunteer?
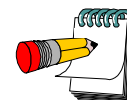
Do you think the volunteer program in your organization could be improved if it were given greater importance?

How could this be achieved?

Why recruit volunteers?

Recruiting

It is obvious that the volunteer and the organization are partners in action. This unity means mutual objectives can be obtained.

To succeed, partners must discuss their motives, expectations and needs. If a volunteer thinks he or she is being offered a stimulating and fulfilling opportunity, he or she will tend to accept the invitation and volunteer time.

Advantages of recruiting volunteers

There are many advantages to recruiting volunteers. They can be classified in three categories:

- advantages for the organization;
- advantages for the volunteer; and
- advantages for the community.

Advantages for the organization

Volunteers offer several advantages for your organization. Here are some of them:

- accomplishing work and meeting objectives;
- bringing a stronger community presence to each project;

- bringing their ideas and commitment to the community, allowing you to see things in their context and ensuring you don't forget the main objective of your project;
- bringing new ideas and talents, skills and willingness to the division of tasks;
- showing enthusiasm for what they are doing, thus making the central group feel refreshed and empowered; and
- gaining recognition – although it is not always recognized, happy volunteers are your most important promoters and publicity agents.

Advantages for the volunteer

Volunteers also benefit from working for an organization. As we have already discussed in this manual, volunteering fulfils personal needs.

Advantages for the whole community

As well as working for the well-being of the community, a volunteer allows you to build on the long term. The individual's personal development resulting from his or her participation in your project,

will be an asset for your community. The more volunteers are trained and experienced, the better they are able to contribute to the long-term well-being of the community.

As they acquire new skills, volunteers can move from one task to another, and even from one project to another. The projects can be increasingly complex and ambitious, in their aim to resolve increasingly difficult problems. The whole community becomes empowered and contributes to its own well-being.

On the other hand, if your volunteers abandon a project without having contributed or learned anything positive, your whole community loses out. Fewer and fewer people will display any confidence or enthusiasm.

How to manage a volunteer program

The literature on this topic emphasizes the difficulty of recruiting volunteers and keeping them within an organization. It maintains that there is a greater chance of success when a global and structured process is adopted that takes into account:

- the organization's preparation for volunteers;

- recruitment;

- welcome and integration into the organization;

- ongoing support; and

- attention paid to volunteers when they leave the organization.

These elements can be represented in a chart that demonstrates their dynamic and continuous process.

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         5.              1.
       Leaving        Preparing

   4.
 Providing                    2.
  ongoing                  Recruiting
  support
              3.
          Integrating
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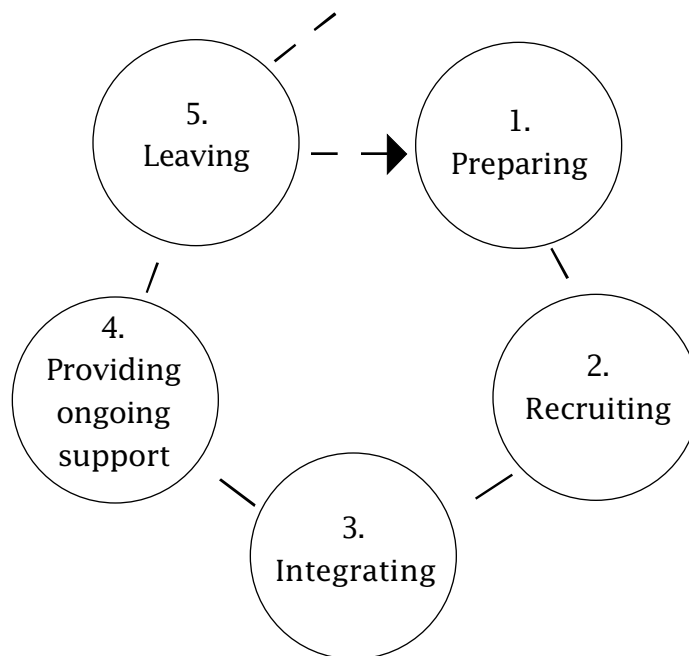
This chart also demonstrates how the steps of managing a volunteer program form a cycle.

Volunteers who leave still contribute to improving the program.

Preparing for volunteers

It is important that you prepare to welcome volunteers even before you start looking for them. It is the first step in the process.
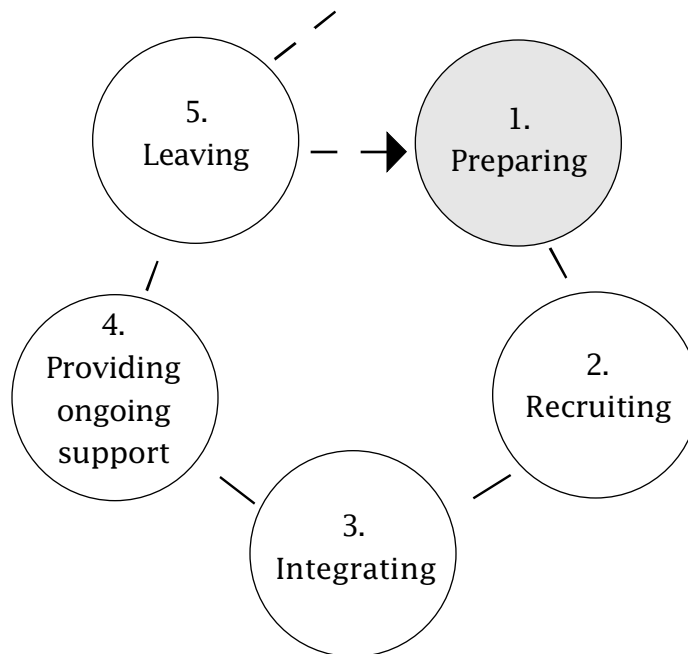
Here are some good ideas when you're preparing to welcome volunteers:

a) determine the organization's volunteer needs;

b) prepare a description of the job and its qualifications;

c) prepare a volunteer application form; and

d) know what your volunteers like and dislike doing.

a) Determining the organization's volunteer needs

Determining the organization's volunteer needs is subdivided into two areas:

- evaluating your organization's existing resources; and

- determining what you plan to do with the volunteers you are recruiting.

Evaluating existing resources

Identify the tasks you want carried out and check if you have the human resources, volunteer or paid staff to accomplish them. This means asking the following questions:

- What do we want to accomplish?
- How will we proceed?
- How many people do we need to accomplish our plans?
- What qualities and knowledge are we looking for in these people?
- What human resources do we already have?
- Do the talents of the available people fulfil our needs?
- Should we recruit?

Determining what you plan to do with the volunteers you're recruiting

Ask yourself why you want to recruit new volunteers:

- to increase the number of services offered?
- to reach a larger clientele?
- to increase the community's participation in your activities?

- to start training people who could eventually become paid employees in your organization?

You should clearly identify your intentions so you can begin planning the coordination of volunteer activities. The volunteer must be considered an important part of the whole global process.

Do you want volunteers to free up your paid employees? Do you want them to carry out tasks that no one else wants to do? If these are your only motivations in recruiting volunteers, there's a risk they will resign. You cannot hope they will do the same work for very long, if there are no other benefits for them.

If this is the context in which you view volunteers, it would be worthwhile reconsidering your organization's approach to future volunteers.

In summary, think about respecting your volunteers' needs and expectations, so that the work they do for your organization makes them happy.

This could lead you to asking questions such as:

- Who will recruit?
- Who will welcome and integrate volunteers?
- Who will train them?
- Who will supervise their work?
- How will we motivate them?
- How will we show our appreciation?

b) Preparing a description of the job and its qualifications

Advantages

One way to determine your needs precisely is to write a job description. You can also add the desired qualifications and advantages of the positions.

The majority of organizations do not have a job description for volunteers. Yet specialists say they are indispensable for the success of a volunteer program.

If there is no job description, certain problems may arise:

- unreasonable expectations and unrealistic demands;
- overburdened schedule; and
- overlapping responsibilities.

The result is that there is a risk that frustration will drive volunteers away from any kind of volunteer work in the future.

The advantages of a job description are numerous. Among other things, they:

- solve the mystery of what a volunteer should know before saying "yes, I want to work for you";
- help the volunteer find his or her place within the organization;
- clarify for everyone (both the potential volunteers and the recruiters) the job's characteristics (responsibilities, demands, advantages);
- assure a better follow-up after the person has been recruited;
- show the future volunteer that your organization is well organized; and
- show the future volunteer that you place enough importance in his or her job to take the time to specify what it involves.

A job description is a tool that puts the right key in the right lock: finding the volunteer that best suits the job and the job that best suits the volunteer.

How to prepare a job description

You might feel overwhelmed by the amount of work it takes to prepare a job description. Don't be. It doesn't need to be complicated, and it is worth devoting time to because it will faciliate everyone's work. A good description of the job and its qualifications could comprise the following elements:

- *Job title*

  An appealing name to identify the volunteer.

- *Purpose*

  A general overview of the work. How does it help the organization attain its objectives?

- *Tasks, duties and responsibilities*

  As precise a list as possible of the job's tasks, duties and responsibilities.

- *Qualifications*

  The desired skills, knowledge, experience and attitudes. Be careful not to be too demanding or you could lose excellent volunteers.

- *Relationships*

  The name of the supervisor and other people with whom volunteers will be working.

- *Help given*

  The help that will be given to the volunteer. The training and support, for example, that will be offered or the equipment that will be available.

- *Required availability*

  The amount of time the job requires. Be as precise as possible. The volunteer has other responsibilities and he or she needs to know clearly if this new job can be structured into his or her schedule. Specify the number of hours required each day, week or month, and how long the job will last. Indicate if the schedule is flexible, and whether it's determined by the organization or the volunteer.

- *Advantages*

  A description of how the volunteer will benefit from the work. This is the equivalent of his or her "salary". There are a variety of possible benefits, so consider which needs the volunteers would like to fill, and you will have your answer.

This job description will be very useful during recruiting, and it can be adapted, if necessary, when the person accepts the position.

c) Preparing a volunteer application form

What should be done if an organization does not have a specific position to fill when an individual offers his or her services as a volunteer?

You can explain the situation and accept his or her offer of service, saying you will be in contact as soon as there is a position that responds both to his or her needs and the needs of the organization.

You can proceed in two ways:

• Ask the person to fill out the appropriate form.

• Take some time to discuss the situation with him or her.

In both cases, it would be a good idea to write down some information to ensure there is an adequate follow-up.

You can find an example of a volunteer application form in Appendix A that you can copy and use to keep the information you have obtained.

d) Knowing what your volunteers like and dislike doing

The volunteer profile form presented in Appendix B can help you recognize the specific needs:

• of the people who offer to work as volunteers;

• of a new volunteer whom you are recruiting; and

• of volunteers who are already in your organization.

Do you know what your volunteers' hidden ambitions and talents are?
Are you sure each of your volunteers is doing the work that best suits him or her?
Do you want to help them take on new responsibilities?
You might want to ask your volunteers to fill out the volunteer profile form presented in Appendix B. The information could help you better manage these issues.

How to recruit volunteers

Now that your organization is prepared to accept volunteers, let's move to the second stage of the process: recruiting.
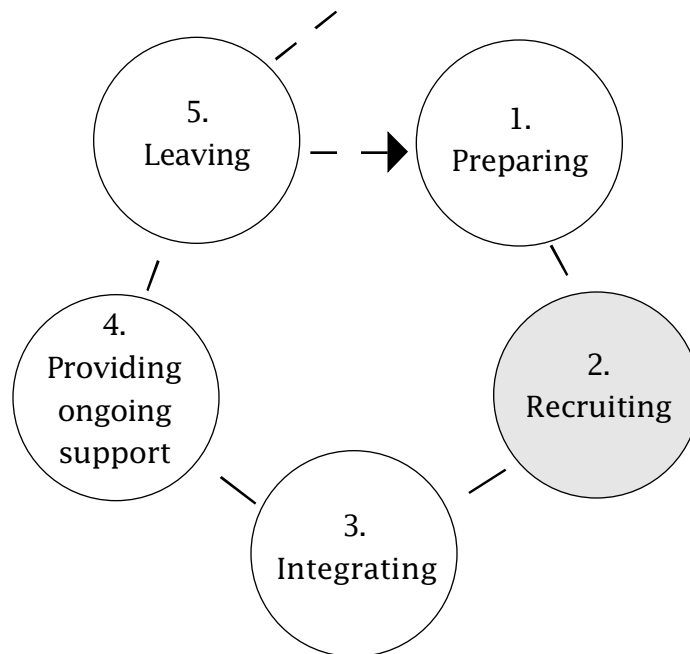
It is difficult to find volunteers.
There is a growing number of
volunteer organizations; therefore,
recruiting is competitive.

As the following diagram
demonstrates, you should seek to
accommodate the needs of the
individual, the organization and the
community.

In a global process, the recruiting
step is subdivided into three
elements:

a)   identifying candidates;
b)   meeting candidates; and
c)   assigning candidates.

a)   Identifying candidates

You have determined the kind of
person you are seeking for your
organization. Now you have to find
the candidates.

A continuous procedure

There is no miracle solution to
recruiting. It is an ongoing
operation and must be integrated
into the global functioning of
your organization.

Each and every member must feel
responsible for recruiting. You
could give the responsibility to a
volunteer coordinator or committee
that would ensure this interest is
kept alive to plan future action.

Where to look

There are potential volunteers
everywhere. The trick is not to be
afraid to ask. Yet your own
organization is still the best place
to recruit volunteers. It seems the
great majority of volunteers
recruited are directly linked to the
volunteers already working within
your organization: friends,
neighbours, relatives, colleagues.

Satisfied volunteers can easily communicate how they benefit from their involvement in your organization. They are your best spokespeople.

Here are some ideas on how to make sure everyone knows you're looking for volunteers. You can:

- post your job offers on your organization's bulletin board;

- make sure people who participate in your organization's activities understand your needs;

- consult the Elders. You will benefit from their experience in the community; and

- find out how other organizations recruit and organize their occasional and permanent volunteers.

Means of communication

Personal contact is the best way to recruit people. You feel motivated when you are visited by a friend, relative or neighbour. But if you can use a variety of techniques, you are more likely to reach a large number of people.

There are dozens of ways to publicize your organization and ensure that you will continually attract volunteers. Here are some examples:

- letters to groups, educational institutions, inactive volunteers;

- newspapers: articles, news, advertisements, pictures of your activities;

- radio and television: public (free) messages, interviews, open-line radio;

- conferences: presentations to other groups or associations, schools, etc;

- "open-door" operations and visits: individualized or small group meetings. Inviting people to information sessions who are likely to be interested in the kind of work you do; and

Did you know that 80 percent of people who do not volunteer say it is because no one has asked them to?*

- literature: pamphlets and small posters placed in busy spots such as stores, community centres, etc.

These methods are beneficial because they publicize your organization while advertising your need for volunteers.

However, there is one drawback. You do not know who will respond and whether they will fit into your group of volunteers.

Choosing the communication methods for a recruitment campaign requires innovation and creativity.

> Why not organize a fun meeting where all of the volunteers are invited to think of original recruiting methods?

b) Meeting candidates

Now you have to meet the people who are interested in working for your organization. Your first contact with the potential volunteers is crucial. You must be frank and represent the organization and its values with integrity. A positive and professional image reflects the profile of your organization.

You must ensure this meeting is more than a simple conversation. Both parties must find the information they need to decide on their future collaboration.

The interview aims to:

- explain the tasks you would like to accomplish;

- give the candidate a tour of your offices and describe ongoing activities;

- learn about the people and their motivations; and

- help decide in which activities they would like to work.

An interview is the best way to select and orient a volunteer. This stage can be delicate because candidates may fear rejection. On the other hand, most people feel flattered simply because they've been selected.

You should summarize the information that's been offered by both parties. The Volunteer Application Form (Appendix A) and

the "What I Like Doing" form (Appendix B) can help you make sure nothing has been forgotten and all of the important information has been recorded.

The volunteers will probably like to think about the issue and discuss it with people around them (family, colleagues and friends) before saying "yes". They might want to participate in some activities before making a commitment.

c) Assigning candidates

You now have all of the information you need to harmonize the needs of the organization with those of the volunteers. Now you can assign the volunteers or, in other words,

decide which position will be given to which person.

You should be flexible. You may not always find perfect, experienced, qualified and available candidates when you need them!

You then have two choices. Adapt the position to the individual or adapt the individual to the position by training.

Organizations concerned with adapting positions to individuals have a greater chance of success. You will find a Volunteer Placement Form in Appendix C that will help you summarize the results of your harmonization process.

Here are six rules for effective recruitment:

1. Recruit with a specific role in mind, rather than asking "anybody to do anything".

2. Actively seek the skills the position requires.

3. Be honest – do not cover up or downplay the task as unimportant, the "anybody can do it syndrome". (Why should I do it if just about anybody else could?)

4. Recruit year round – plant the seeds early.

5. Use many different recruitment techniques. Be sure to consider the entire community. Go to places where people congregrate.

6. Treat the job as an opportunity.

How to integrate volunteers

You have finally found good volunteers for your organization. Congratulations! But the process does not stop there. Now you are partners in action and you need to give the volunteer tools so he or she feels comfortable and starts working. Let's examine the third step in this process.

5.
Leaving

1.
Preparing

4.
Providing
ongoing
support

2.
Recruiting

3.
Integrating
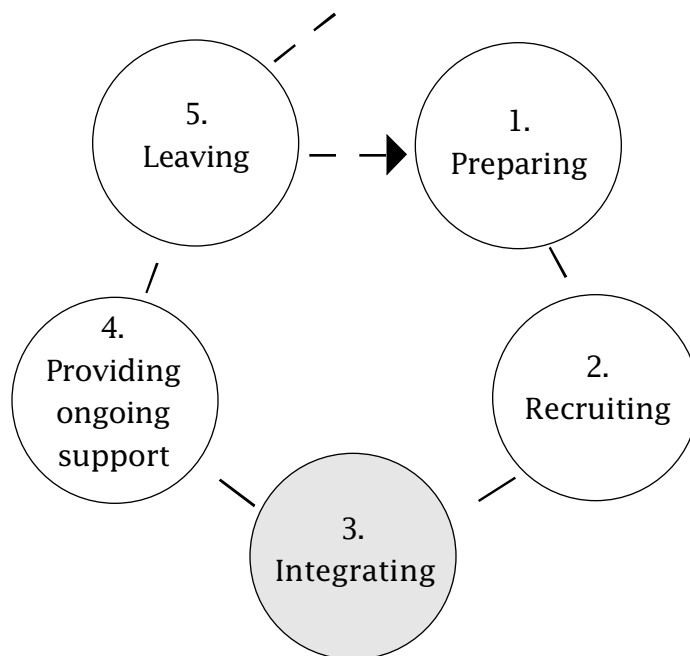
Volunteers tend to feel insecure and uncertain when they first arrive in a new situation. By integrating them, they become more familiar with the organization, its functioning and its members. The goal of integration is to give volunteers time to become self-reliant and competent.

Furthermore, the information volunteers receive about the organization allows them to verify if it responds to expectations. This makes volunteers feel comfortable and helps solidify the group's work.

Integration allows an individual to adapt and become part of a new environment. This is a holistic process. The individual becomes an integral part of the organization.
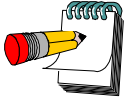
What do you think the benefits are of taking time to provide orientation to a new volunteer?

-

-

This integration process has several benefits. Here are some of them:

- It increases the volunteer's abilities, sense of belonging, motivation and self-confidence.

- The volunteer will fulfil his or her mandates more effectively and the organization will develop a credible image in the users' eyes. This perception might even encourage other people to become involved in your organization's activities.

- The people who participate in your organization's activities will receive better service.

There are five steps in the process of integrating volunteers:

a) welcome
b) information
c) commitment
d) training
e) assuming duties.

a) Welcome

The welcome is the first contact between the new resource and the people who are already in place. The atmosphere and the warmth communicated will greatly influence the new volunteer.

Start by congratulating the individual and handing him or her a letter of welcome.

Follow up with a tour of the premises, if this has not been done, and introduce the volunteer to the people with whom he or she will be working. This is a good chance to chat informally, ask questions and observe what's going on. The volunteer will thus gradually see how he or she can integrate into the organization.

A good approach is to pair new volunteers with more experienced

ones. It is often effective to ask volunteers who have been with you for a number of months to orient new volunteers. These "old-hands" give the newcomers confidence with their attitude of: "I was just as unfamiliar with all of this as you, but soon you will feel as comfortable as I do."

b) Information

Information should combine the volunteer's knowledge with your organization's projects and needs, and answer all of his or her questions.

The information could, for example, include:

- a profile of the organization's, history, main achievements, goals and objectives, etc.;
- the organization's policies and procedures (i.e., reimbursing expenses); and
- the volunteer's tasks and responsibilities.

c) Commitment

Now that the volunteer knows a bit more about the organization and has started to better understand what is expected of him or her, you can talk about his or her commitment.

This can be done by reviewing the job description that was prepared at the beginning of the process. Together, you can ask questions such as:

- Does this description still correspond to the organization's expectations?
- Does the volunteer feel comfortable with these duties?
- Are there ways to adapt to the volunteer's skills and particular needs?
- Does the volunteer need training to make him or her feel more comfortable and effective?
- Does the volunteer have the time to fulfil his or her duties without neglecting the other parts of his or her personal life?

The job description can be modified according to the needs of the two parties. Be sure your description coincides with that of the volunteer.

Add the rights and responsibilities the two parties agree to respect. Be as precise as possible.

Volunteers say their main reason for "leaving" was the difference between what was explained to them at the beginning and what was really expected.*

d) Training

Training allows new volunteers to acquire knowledge and practise skills so they feel more comfortable in their tasks. Volunteers will then feel more motivated to work and perform.

A good part of the training is accomplished naturally through contact with other volunteers. It can also occur in a more structured fashion. Here are some of the forms the training can take:

- on-the-job training by "old-hands"
- discussion workshops
- professional training
- symposiums
- study days
- role playing.

In the majority of cases, volunteers need to be trained in human relations, the psychology of people in crisis and the philosophy of volunteerism.

You can also consider additional training for tasks such as presiding over meetings, writing proposals, public speaking, active listening, etc.

Orientation and training create and maintain confidence and competence. Remember that the goal of training is to encourage effectiveness, not to overload volunteers with work or discourage them.

Volunteers should be exposed to practical situations that they can easily relate to their own experience. The training should be active and pertinent to the volunteer's duties.

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* **SOURCE:** *Volunteers Working Together, Skills Program for Management Volunteers*, Government of Canada, Fitness and Amateur Sport, 1986.

You could choose subjects you find interesting in this kit, and photocopy the pertinent information for the volunteer or provide a short training session.

e) Assuming duties

You can now let volunteers start working. But don't abandon them! It's a difficult period. They need a lot of support during this period, and want to feel needed and valued.

Let volunteers express their emotions about their new experience.

Always stay in contact with the new volunteers. Be sure that they assume their responsibilities, and try to detect problems as soon as possible. Be ready to help if a problem does arise.

How to offer ongoing support to volunteers

If the whole process has gone smoothly, volunteers can begin to work independently. They should now be able to ask for help when needed.

Volunteers need continuous support. Let your presence be felt. This is illustrated in Step 4 of this process.

5. Leaving

1. Preparing

4. Providing ongoing support

2. Recruiting

3. Integrating
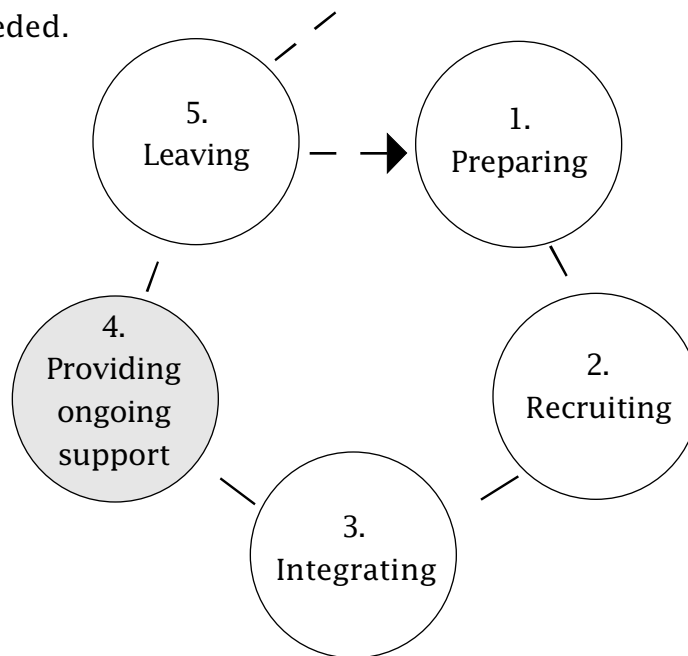
Now that the volunteers work independently, you might be tempted to concentrate all of your energy on the participants in your program. Yet volunteers also deserve a significant part of your attention.

The goal of ongoing support is to make sure volunteers are succeeding and are satisfied with their personal improvement and self-esteem.

This must occur within an equal and respectful relationship. An

encouraging supervisor is aware of volunteers' abilities, limits, personalities, needs and desires. The supervisor allows volunteers to assume responsibilities, make decisions and share encouragement and rewards.

Good support means:

a) supervising
b) motivating
c) evaluating
d) helping to evolve
e) showing appreciation.

a) Supervising

To do good work, volunteers need to be informed, know where they are going and what is expected of them. They need to be supervised. Keep them apprised of the overall situation and provide feedback on their efforts.

The volunteers' supervisor could meet with them periodically, telephone them from time to time and visit them on the job site to encourage them and to check that everything is going well.

Act quickly when problems arise, and never make negative remarks to volunteers in front of other people. Ask to meet them privately, explain the problem and try to work together to find a solution. If necessary, you can refer to the job description to clear up any misunderstandings.

If a volunteer does not like a job but still cares about the organization, see if he or she will try something else. Do not try to keep volunteers in jobs that they do not like. If the job does not work out for a volunteer, the volunteer cannot do the job well.

b) Motivating

Motivating is giving someone the desire to participate. It is closely linked to the way an organization is managed.

The organization must offer an encouraging environment that supports a volunteer's spirit. By creating circumstances that take advantage of resources, you encourage motivation, enthusiasm, skills and the drive of people who collaborate to achieve mutual goals and aspirations.

What do you think are the most important factors in motivating volunteers?

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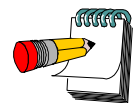
Several factors are at play when you motivate volunteers. Here are some examples:

- staying close to volunteers and attentive to their situation;

- regularly verifying how they feel;

- making sure their tasks are interesting;

- encouraging their creativity and commitment;

- always giving them responsibilities according to their abilities so they see their work as a challenge they are capable of accomplishing and not as an insurmountable task;

- allowing them to participate directly in planning and administering programs;

- giving responsibilities, delegating power, not making decisions for them; and

- being thoughtful – offering coffee, a parking spot, etc.

c) Evaluating

Evaluating helps show volunteers that their efforts are bearing fruit. It identifies difficulties so they are not repeated but it also stresses the good things that volunteers have done, thus motivating them.

It is important to evaluate volunteers regularly. If this is done

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Examples to help you understand

A volunteer named Marie is in charge of Saturday morning volleyball tournaments for 8- to 12-year-old children. During the match last week, Kevin, from the Ravens team, fell and broke his leg.

Marie managed to keep things under control. In no time at all, she had consoled Kevin, immobilized the broken leg, called his parents and reassured the rest of the children.

Soon after the accident, Kevin was at the doctor's and the match restarted.

Through the evaluation process, Marie's talents were highlighted. She demonstrated good judgment and knew how to react in an unusual situation. These qualities will be noted in her file and will be recognized if a new volunteer job requires similar qualities.

in an open and constructive manner, everyone benefits.

A periodic evaluation benefits both the organization and the volunteer. It is not a question of criticizing the work. On the contrary, it is taking time to explain the value and importance of the work that has been accomplished.

The evaluation must include two components: the volunteer's performance and the volunteer program itself. The evaluation must:

- help volunteers rectify, if needed, a problem situation. Have they understood what was expected of them? Do they need further explanations? How could the situation be corrected?;

- make sure the responsibilities that have been assigned do not surpass their capacities or aptitudes;

- adapt the tasks to volunteers' personalities;

- adjust the organization's activities by taking advantage of the volunteers' contacts with the organization's clients;

- keep volunteers informed about the evolution of projects and the team's good work;

- check how volunteers are doing in the organization. Do they feel useful? Accepted? Do they have enough or too many responsibilities? Are they satisfied with their participation in the group?; and

- verify if volunteers need more training.

Some organizations do not even compile the number of hours their volunteers work! These data are important for motivating volunteers and allow you to show the sponsors the scope of the work accomplished by your team.

It could be enriching to gather all your volunteers together once a year. They could:

- comment on their experiences;

- talk about their degree of satisfaction, the direction they are taking in their work, what they have liked and what they have not liked;

- say if their work has been recognized for its true value;

- suggest improvements; and

- raise all the problems that are bothering them.

You will find an evaluation guide in Appendix D. It contains examples of questions that can be adapted to your current situation. These questions can be used as the basis for a meeting with one or several volunteers.

This kit contains a manual that deals specifically with program evaluation. Please consult it for more information on the subject.

d) Helping to evolve

We explained at the beginning of this manual that people become volunteers because they have needs to be met. These needs can evolve and the organization should take this into account to try to ensure that volunteers remain satisfied and productive.

A constructive evaluation helps volunteers evolve by giving them feedback and inviting them to give their comments. And there are other ways to help volunteers evolve. Providing them with training, for example, or allowing them to assume new duties.

You provided basic training when the volunteer started his or her job. We recommend that you continue

to provide opportunities for improvement. The organization could offer a combination of informal and formal training, such as:

- circulating interesting magazine articles on a topic;

- offering information sessions; and

- registering for courses or symposiums held outside the organization.

If you are constantly interacting with volunteers, you'll be able to identify together when they are ready for new responsibilites. Specific training might be needed during these transitions. You must not parachute the volunteers into new positions without offering support.

Training offers tangible proof of ongoing support for volunteers. In return, it increases the volunteers' skills, satisfaction and commitment to your organization.

e) Showing appreciation

You should regularly show volunteers that you recognize and appreciate the work they have done, rather than waiting until they leave the organization.

Appreciation makes volunteers feel special. Most volunteers are stimulated and motivated into action by such gestures.

There are many ways to recognize a volunteer's work. Here are some examples of personal recognition:

- a warm thank-you;

- a handshake;

- a Christmas or birthday card;

- words of congratulations;

- smiles, delighted expressions;

- a coffee;

- a letter offering support in a particular situation;

- a letter to the volunteer's employer or family, thanking them for the support they have provided;

- an encouraging remark;

- a request for advice or assistance; and

- free admission to upcoming activities.

Sometimes the simplest gesture can warm the heart the most.

How does your organization encourage personal recognition of volunteers?

How could you increase this practice among your volunteers?

Recognition can also be demonstrated publicly. Here are examples:

- publicizing work through the media;

- publishing a photo of the "volunteer of the month" or a text about the volunteer in the organization's monthly bulletin or local newspaper. Emphasize what the volunteer has achieved during a community radio or television program. Publish press releases in reports or on billboards;

- giving a plaque, pin, diploma or certificate during a special meeting; and

- organizing a volunteer appreciation evening or week.

You choose the method. What's important is to recognize volunteers in your organization's daily routine.

What to do when volunteers leave

Volunteers eventually leave. Stage 5 describes how the organization should respond when this happens.
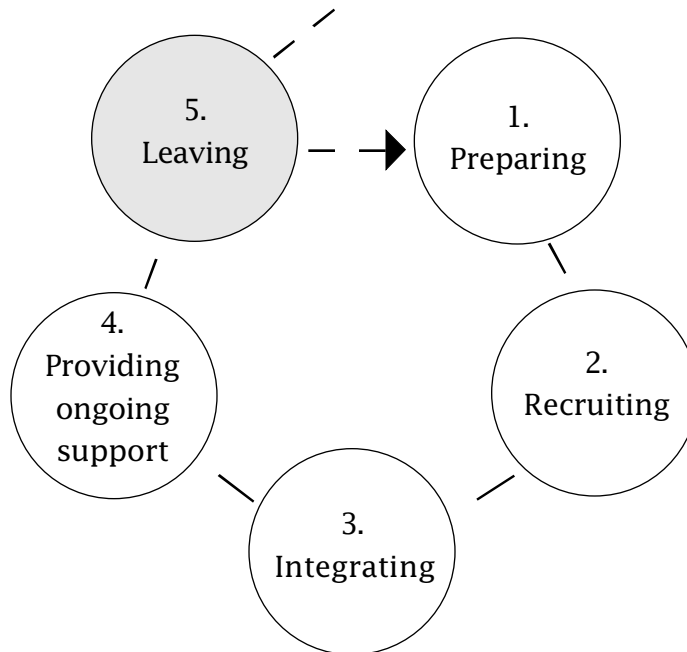
Let your volunteers retire gracefully, with thanks and recognition. Accept when they want to quit, and thank them.

In a well-planned volunteer program, the organization has time to fill the void by:

- gathering the departing volunteers' comments in order to improve the program;

- asking them to describe what they were doing and how they were doing it, in order to help the people who are picking up where they left off;

- asking them to help recruit the best person to replace them in the job; and

- inviting them to take the replacement under their wing for some time.

One way to recognize a volunteer's work is to give him or her a letter of reference. This could prove useful, for example, when he or she tries to find a paying job.

V. HOW TO FIND OTHER RESOURCES: MONEY, MATERIALS, SERVICES

The chapter on volunteers helped answer the following questions:

- Who do we need?
- Where can we find these people?
- How can we manage our volunteer program so we are able to find good human resources and keep them in our organization?

This chapter focuses on other types of resources: money, materials and services. We will use the term "funding" in the following sense:

> finding the resources (money, materials and services) you need to run your organization and carry out activities and projects that pursue your objectives.

The process involves three steps:

- assessing your funding needs (shopping list);
- planning how you will acquire resources; and
- using appropriate techniques and tools.

Assessing your funding needs

Some aspects of a needs assessment require special attention:

a) knowing the various kinds of needs;

b) knowing what you can get; and

c) preparing your "shopping list".

a) Knowing the various kinds of needs

Your organization's needs will influence the way you fundraise.

Core funding versus project funding

Core funding is the money you need to operate an office, such as pay for rent, office supplies, computers, telephones, secretarial services, advertising, bookkeeping and any other expenses.

This type of core funding is becoming more and more difficult to obtain from governments and foundations. Sponsors who fund your day-to-day operations find it difficult to justify your accomplishments.

On the other hand, projects have set beginning and end dates. This leads to tangible results, such as conducting an information tour, writing and publishing a pamphlet, preparing a slide show or video tape, or researching a specific topic.

Sponsors will fund specific short-term projects because they feel they are playing a measurable role in a tangible activity. They are not committing themselves to a long-term program that may be hard to evaluate and could become less effective over the years.

How can you cover your basic operating expenses? One way is to determine if your organization's permanent programs could be "packaged and sold" as distinct projects.

Fundraise for each specific project. Give each project a large enough budget to cover the overhead expenses of a permanent program. Overhead, which means expenses arising from general running costs, should not exceed 13 percent of the total project cost.

If all of this seems a bit complicated, don't forget that marketing is a big part of fundraising. A cleverly packaged project will be easier to sell.

The importance of core funding

If possible, you should try to obtain core funding. This will help you fundraise for specific projects. In fact, many foundation or government grant programs require that you already have other sources of funding before they will support your project.

You could try to get funding for overhead expenses from individual donations or your members. They may be less reluctant to provide this type of funding.

You could also make some aspects of your programs profit generating; for example, by selling publications or services or by charging for some of the services you provide. The money you collect could be used to cover some of your operating expenses that cannot be covered by project funding.

Diversified funding

Whatever the type of funding you are looking for, it is important to diversify your sources.

By developing a broader base, you remain independent of your supporters and maintain positive relations with them.

Single source

Diversified sources *

It can be
hazardous
to have
only one
funding
source!

Local administration	$
Provincial government	$
Territorial government	$
Federal government	$
Foundations	$
Companies	$
Individuals	$

Skills, services,
products and people
from a wide variety of
organizations

NO !

YES !
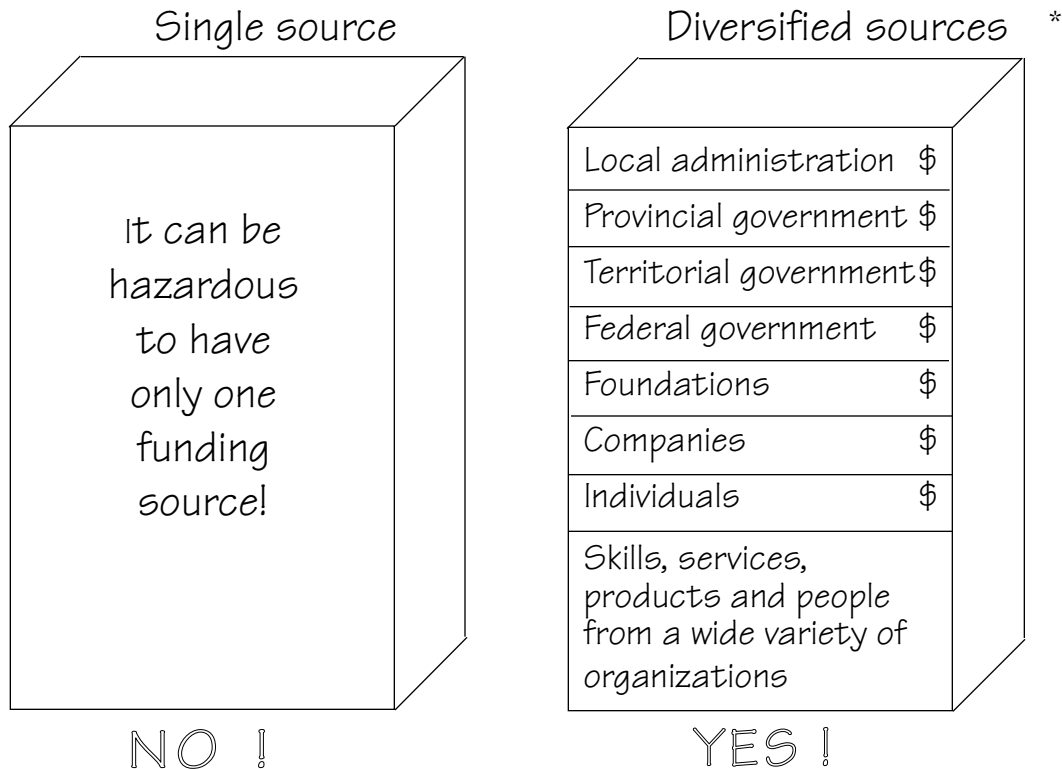
b) Knowing what you can get

The variety of financial resources available is impressive. Have you ever thought of these sources of funding?

- technical support: use of rooms, film rentals, photocopy services, etc.;

- professional support: assistance with project elaboration, training, help with budgeting, access to statistical data, etc.;

- grants: from municipal, provincial or federal sources and from foundations;

- charging: fees for registration, admission, memberships, renting equipment or materials, concession booths (e.g., snack bars or boutiques on your organization's premises) or services (e.g., secretary, expertise);

- donations: in money, services or products (e.g., free meals, plane tickets, office supplies);

- sponsoring: in money, goods or services; and

- banking operations: loans, credit margins, preferential interest rates.

c) Preparing your "shopping list"

To pinpoint your needs, you have to assess the situation. You have to compare the financial resources you need to those your organization already has.

This exercise will probably indicate that you do not have all of the necessary financial resources to carry out the activities that will enable you to achieve your objectives.

To be sure you have not forgotten anything, it is a good idea to prepare a "shopping list". When you have a clear idea of what you need, you can concentrate your energies on strategies to fulfil those needs. Every time you find an element from the list, you can cross it off.

The list can contain more than financial needs. It can also include material resources (equipment, products), human resources (time and skills), as well as technical and professional services. Since we have already dealt with volunteers in another chapter, we will not do so here. As you are preparing your "shopping list", try to be as specific as possible and not translate your needs into financial terms too quickly.

Examples
to help you
understand

For example, preparing a promotional pamphlet could cost:	
In financial terms	In other terms
• hundreds of dollars	• volunteer hours (to design it, write it and do the layout)
	• paper (that you might be able to get free of charge)
	• photocopy services (that you might be able to get free of charge)
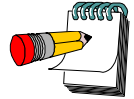
By working with the "Planning" manual, you have identified activities
and projects that will help you reach your organization's objectives.
Now, select one of these activities or projects and prepare your
shopping list.

Activity or project: _____

Shopping list:

- 　　　　　　　　　　　　　　　　　-
- 　　　　　　　　　　　　　　　　　-
- 　　　　　　　　　　　　　　　　　-

Planning how you will acquire financial resources

You have your shopping list. Now you have to find a way to get the various items on your list. Some things may be quite easy to find, while others may require a lot of time and energy.

To help you plan your strategy for acquiring resources, you need:

a) to know the various methods for acquiring resources;

b) to know the pros and cons of each method; and

c) to choose the most appropriate methods for your needs.

a) Knowing the various methods for acquiring resources

There are many methods for funding non-governmental organizations. The main ones are:

- government grants;

- grants from foundations;

- individual donations;

- business contributions;

- income generated by your programs; and

- special events and sales of articles or services.

Only you can decide which of these methods best suits your organization and its needs.

b) Knowing the pros and cons of each method

Before throwing yourself blindly into a fundraising activity that may look like fun at first, it is wise to be aware of the pros and cons of each method.

Grants from governments and foundations

METHODS	PROS	CONS
Many municipalities, provincial ministries and federal departments have funding programs. Many foundations give out money. Each one has a series of guidelines concerning the types of groups or projects it is willing to support. Some of the fields of interest targeted by foundations, and for which your organization may be eligible, include diabetes, violence toward women, alcoholism and drug addiction, Native issues, crisis services, volunteers, community development and health.	• They can be a major source of income. • Eligibility criteria are well explained (it is usually easy to determine whether or not your project is eligible for funding).	• It can be time consuming to obtain basic information about each program so you can decide which ones are relevant for your activities. • The grant application must be detailed and presented very carefully. You will need complete documentation on the project. As a result, it can require some expertise and a lot of preparation time. • It can take quite some time to receive an answer. • Grants are generally awarded for a specific project and are not renewable.

Individual donations		
METHODS	PROS	CONS
This method involves soliciting donations through personal contacts (e.g., door to door, telephone or letters). There are two approaches to soliciting individuals: 1. Find a target donor who will be solicited in person. 2. Solicit a large number of people, for instance, via mass mailing or telephoning.	• They are low cost. • They result in net, direct profits. • They encourage public relations: gives you the opportunity to talk about your organization and projects. • Contributions are tax deductible for the donor.	• They can require the help of a large number of volunteers. • Soliciting is not an easy task. • The time investment is large compared to the contributions that can be expected. • Door to door soliciting can be costly in both time and money.

Business contributions

METHODS	PROS	CONS
Many businesses set aside a certain sum of money, products or services in their annual budget for making donations. This method is similar to soliciting personal donations, except that it targets businesses.	• There is potential for larger donations. • They create good public relations for the business and organization. • They result in tax deductions for businesses. • There is potential for repeat donations (stable funding).	• The willingness to contribute depends on the business cycle. • It is difficult to identify the person who approves donations. • Large businesses require a professional presentation. • The lapse of time between commitment and donation may be considerable.

Income generated by your programs		
METHODS	PROS	CONS
Your programs and projects can themselves generate income. This was discussed previously under the heading "The importance of core funding".	• It can cover part of the organization's overhead expenses. • It can help you get funding from other sources. • The organization remains free to choose the type of projects it wants. • It ensures a certain stability if grants are cut back. • It creates a feeling of belonging among members and clients. • It indicates to what extent your organization is integrated into the community.	• Collecting money must become part of the staff's regular activities. • Renewing annual memberships may require a certain amount of work. • Rental equipment may need to be maintained and repaired if damaged. • Selling materials or products may involve down payments and managing stocks. • Selling expertise may require you to allow staff to work for other clients.

Special events

METHODS	PROS	CONS
This form of fundraising involves selling the event and not the cause. There are a multitude of special events that can be organized for fundraising purposes. For example: brunches, supper-time lectures, bake sales, raffle nights, Halloween parties, rock-a-thons. The main challenge is to choose them properly.	• They are enjoyable. • They often help reach a new clientele from which volunteers can be recruited. • They provide the opportunity for thanking or honouring certain people. • It is easier to solicit people in a relaxed atmosphere. • It gives the donor an opportunity to meet and exchange with others and have fun. • Participating in community activities creates solidarity. • It is a good opportunity for publicizing the organization. • You may be able to have the activity sponsored. • Income and expenses easy to administer. • Activities such as rock-a-thons require limited investments and generate immediate net profits.	• They can be rather expensive and down payments are required. • Organizing them can be quite complex, demanding a lot of preparation and the participation of many volunteers. • They may require a permit or tax remittances to the government. • They do not always bring in a lot of money and can even lose money. • People expect to get good value for their money (they forget that it is actually a donation and compare what they give to what they receive). • You may need to do a lot of advertising for the activity to be noticed.

Sales of articles or services		
METHODS	PROS	CONS
Selling is a means of fundraising. You are selling an article or a service, not the cause. Here are some examples of sales: auctions, flea markets, garage sales, crafts, chocolate, raffle tickets, car washes and empty bottle pick-ups.	• They require a minimal investment when objects for sale are donated. In this case, profits are direct and can be quite high. • The donor gets something for his or her money. • They help publicize the organization. • Selling of services gets the beneficiaries of the organization involved.	• They can require a lot of advertising. • Problems may be encountered when collecting, maintaining and storing objects. • They may require a permit or tax remittance to the government. • A lot of salespeople are needed. • Sums per item may be small. • If articles need to be bought, you may have to invest some money. • You may have to share profits (e.g., the chocolate distributor may ask for a percentage of sales). • Profits may be lower if all items are not sold.

c) Choosing the most appropriate methods for your needs

You need to take several elements into consideration when planning how you will acquire the financial resources on your shopping list:

a) the objectives of fundraising activities:

- Do you want to make your organization more visible?
- Do you want to involve the people who benefit from your services?
- Do you want to develop a sense of belonging?
- Will you create a fun activity for people in your community?
- Will you train leaders?
- Will this motivate staff and volunteers?
- Will this raise public awareness of your cause?

b) the type of needs:

- Are you seeking core funding or project funding?
- Are your programs grouped together as projects?
- Which project is most appealing to a sponsor?
- Do you need material, resources and services?
- Where can you obtain them?

c) the scope of the project:

- Is the project you want to set up a large-scale project?
- Do you need large sums of money? (specify exactly how much)

d) the urgency of the needs:

- Do you need the money immediately or can you wait a few months or even a year before receiving it?

e) your organization's past:

- What methods have been successful in the past and what sources of funding provided good results?

f) the information at your disposal:

- How much effort should you make to get the information you need (details on grant programs, addresses of the people responsible for approving business contributions in your region, lists of people who might donate to your organization, etc.)?

g) the kind of project you want to promote:

- do you fulfil the eligibility criteria for governmental and foundation grant programs?

h) the skills and resources at
your disposal:

- Do you have or can you recruit
enough people to carry out
your fundraising activities?
- Do they have the necessary
skills (e.g., writing proposals,
organizing an evening event)?
- Do they have enough time to
accomplish all the activities
before the final deadline?
- Do you have the necessary
financial resources to organize
a given fundraising activity?

i) your values:

- Is the activity in keeping with
your organization's values and
those of the people in your
community (e.g., contributions
from certain companies)?

j) your social environment:

- Are any other organizations
planning similar fundraising
activities?
- Would it be advantageous to
combine your efforts with
theirs?

Take each of these aspects into
consideration and try to see which
fundraising methods would be the
least costly for your organization in
terms of time, energy and money.
In light of the information you now
have, try to identify which methods
are most likely to give you access to
what you need.

Finally, select one activity or a series
of activities you feel would be most
appropriate, and make it happen!
The techniques and tools described
in the next chapter will help you
cross this bridge.
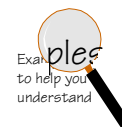
In a small community, a youth support group wants to organize an activity that would allow young people to experience a form of traditional spirituality.

The members have decided to take a group of 12 young people from the community into the forest for one week. The activity is scheduled to take place next summer.

Here is an idea of their funding strategy:

Objectives:	• to get the necessary resources;
	• to raise public awareness about the positive spiritual impact of spending time in the forest;
	• to organize fundraising activities that will bring people from the community together to enjoy themselves; and
	• to improve our fundraising skills.
Type of need:	Project funding.
Scope of project:	Small scale.
Necessary resources:	• $200.00 for travel expenses to and from the forest (gas) and other expenses;
	• basic foodstuffs;
	• Elders; and
	• drivers to transport young people and material.
Urgency of the need:	In the next six months.
What activities have been successful in the past?	Bingo, asking Elders to get involved, soliciting private businesses.

Examples to help you understand

Exam*ples*
to help you
understand

Fundraising knowledge and skills:	Fairly limited (have never applied for government grants, grants from foundations or big business contributions).
Selected funding methods:	After having asked about the activities planned by other organizations in the community, the members of the group decided on the following plan:

- Organizers will contact Elders to ask them if they will take the young people into the forest.

- They will ask a local radio station to interview an Elder, an organizer and two Young people. These people will raise community awareness about the importance of spirituality. They will publicize their resource needs (their "shopping list").

- They will organize a walk-a-thon and empty bottle pick-ups in the community. This will give young people the opportunity to talk about their project and its objectives.

- They will organize a raffle night to raise money for the project. The publicity will mention the project objectives.

- They will ask two community grocery stores to provide basic food supplies for one week.

- Over the next year they will examine the possibility of applying for funding from an appropriate foundation.

Respect of values:	The group feels these methods are in keeping with its values and those of the community.
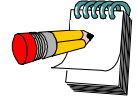
Using your shopping list, the information you now have, the example provided above and the following questions, plan how you will acquire resources.

Objectives:

•

•

•

Type of need: ———— Core funding

———— Project funding

Scope of project:

Necessary resources:

•

•

•

•

Urgency of the need:
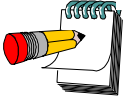
What activities have been successful in the past?

-

-

-

Fundraising knowledge and skills:

Selected funding methods:

_____ grant application

_____ request for individual donations

_____ request for business contributions

_____ income generated by programs

_____ special events

_____ other

Is it in keeping with group and community values?

Making it happen

You have already assessed your needs and planned how you will acquire financial resources. Now you need to make it happen. In this section, we will focus on the appropriate techniques and tools for doing so:

a) how to make your funding needs known;

b) how to apply for grants;

c) how to approach businesses;

d) how to successfully organize a special event; and

e) legal aspects to consider.

a) How to make your funding needs known

A request for financial resources that is properly presented will be easier to "sell". How can you successfully achieve this? By answering a simple question: "What will the funding be used for?" There are right and wrong answers to this question. Wrong answers focus on internal organizational needs.

Your job is to show donors how their donation will help someone. By converting the cost of a service into benefits, you present a different perspective to donors: they will focus on what their donation can do.

Here are some examples of right and wrong answers to the question "what will the money be used for?":

"Wrong" answers	"Right" answers
Money to buy books and furniture, and pay the salary of one employee who will take care of the information centre.	To set up an information centre which will respond to 50 people each month and help them find solutions to their problems.
Secretary ($15,000 per year)	To provide support each day to approximately 25 people who phone or come into the office for information ($2.40 per person).
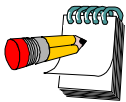
Look at your "shopping list" again.

Try to answer the question: "What will the money be used for?"

Are the elements presented in terms of costs rather than benefits? If such is the case, choose one of them and try to convert a "wrong answer" into a "right answer".

"Wrong" answer	"Right" answer

b) How to apply for grants

If you would like to obtain funding from a grant, you need to:

1) determine which foundations and government programs are relevant to your activities and might provide financial support to your organization; and

2) prepare a grant application.

1) *Select relevant foundations and government programs*

Foundations

For all relevant information on this topic, we recommend you consult the *Canadian Directory to Foundations*, published by the Canadian Center for Philanthropy. It gives the names and addresses of foundations, their fields of interests, their eligibility criteria, the time of year you must present your request and all the other details you might need.

The directory costs about $250.00, depending on whether your organization is affiliated with the centre and where your organization is located.

You can consult the directory, which is available in English only, in Toronto at the Canadian Centre for Philanthropy. Reference libraries

(for example, in ministries, colleges and universities) also provide copies. It should become available on the Internet.

The Canadian Centre for Philanthropy is a national charitable organization aiming to strengthen charitable and volunteer organizations through research, public relations, information material and professional development. It offers a variety of very interesting support services. For more information, phone 1-800-263-1178.

The Centre's address is:

1329 Bay Street, Suite 200
Toronto, Ontario
M5R 2C4

Most foundations require any organization they support financially to be registered as a charitable organization (number assigned by Revenue Canada). See the manual entitled "Toolbox" for more information.

Governments

Many government ministries and organizations give grants to community groups. It is a good idea to explore all of the funding possibilities offered by all government services on the municipal, provincial and federal levels.

Municipalities often set aside small amounts of grant money for non-profit community groups. You can contact city hall to find out more about these kinds of programs.

Also, to identify the ministries and organizations likely to be interested in your organization's activities, you can consult the blue pages in the phone book under Information on federal programs and services. These ministries and organizations can give you some idea of where to start searching on both levels of government.

Obtain information on the ministry's various grant programs and try to identify, based on your objectives, whether your organization fulfils their eligibility criteria. Also ask for relevant documentation and grant application forms.

The information you obtain will help you decide which foundation and government programs might grant you financial support.

Before you even begin writing your request for funding and filling out the required forms, you can refer to Appendix E to make sure you have all of the relevant information.

2) *Preparing a proposal for funding*

Goal

Why do you have to fill out a proposal for funding? Because sponsors want to be sure that you are filling a need and need to know exactly what you plan on doing to fill that need.

Your task is to prove that your team and your project are able to meet the eligibility requirements. If need be, adapt your vocabulary to what you find in their documentation. Some funding bodies provide forms to fill out, while others provide only a few guidelines. Be sure you follow them closely.

Presentation

Although presentation can vary, here is a description of the main points that should be included in your proposal, in order of appearance.

1. Title page

Prepare a title page highlighting the project title. Include your organization's name, address, telephone number, fax number and e-mail address, as well as its registration number. Include the

name of the resource person from your organization to contact for future inquiries.

2. Table of contents

List each section and sub-section of your proposal, including the summary and appendices. Indicate the page numbers beside each heading.

3. Summary

For the busy reader, this is the most important part of your proposal. Summarize each section carefully and in order. Be sure to specify the dollar amount you are requesting.

4. Introduction

Specify the social, religious, cultural, scientific or organizational context of your project.

5. Statement of need

Explain in concrete and meaningful terms the purpose of your project.

What need does it fulfil? What is the situation? **You** may know, but you have to convince other people of your project's usefulness. Provide proof (studies, statistics, etc.) of the undesirable situation and explain why it has to be changed.

6. Statement of purpose

Indicate what you intend to do to change the situation and state why. Give any relevant information: number of people, schools, families in the sector, etc.

7. Project description

a) Goal and objectives: describe the goal to be attained. State the short- and long-term objectives of your project.

b) Target groups: Who will benefit from the project (groups and individuals)? Why were they selected? In concrete terms, how do you intend to serve or involve them?

Be specific. For instance, if you want to produce a booklet, present the table of contents and how it will be reproduced (photocopy or offset printing). How many pages and illustrations will it contain? What will the page format be? You need to make these decisions in order to budget accurately, so include them in this section. It will show that you know what you're doing.

Examples
to help you
understand

c) Management: Describe who will be supervising the project. Who will be accountable to whom? How will project leaders be expected to report on the overall running of the project? How often will reports be requested and to whom will they be addressed? If necessary, provide an organizational chart of your group.

d) Staff: Describe the participants' background. Provide an appendix with their résumés. You have to convince the reader you have staff who can successfully carry the project to term.

e) Your organization's experience: Briefly describe the group's expertise and past accomplishments in the field. If need be, describe in an appendix some of the projects you have under way or have carried out in the past.

Examples
to help you
understand

For the booklet example, you could specify the required time for each phase: research, writing, layout, printing, promotion and distribution.

Determine how many days, weeks or months will be necessary for each phase.

---

8. Budget and workplan

The budget and workplan are probably the most important sections of the proposal.

Divide the project into steps or phases and indicate how long each one will take.

Mention if organizations have donated money, equipment, installations or services.

Also mention if part of the costs are to be covered by income generated by the project.

While the workplan indicates how and when the money will be spent and the kinds of activities that will be undertaken, the budget places the whole plan in perspective.

You could lose all credibility if you ask for too much or too little because it suggests you do not have the necessary skills to properly manage the money you are soliciting.

Make sure all of the project costs are covered. Postage, long-distance telephone calls, fax transmissions, etc., are often overlooked. Also, remember to budget salary time for project supervision and management.

If possible, ask for the assistance of an accountant to verify your budget and correct any errors.

Examples to help you understand

Here is a sample budget for writing, producing and distributing a booklet. It will be 7" by 9" (18 by 23 cm) and 30 pages long. It will be prepared on a word processor and 500 photocopies will be made.

NOTE: The costs in this sample are realistic, but not necessarily 100 percent accurate. It is intended to be a sample budget. Other approaches can be used.

1. Salaries

Research: 10 days @ $110/day:	$1,100
Writing and editing: 10 days @ $130/day:	$1,300
Secretary: 12 days @ $95/day:	$1,140
Graphic design:	$300
Promotion and distribution:	$300
Supervision: 3 days @ $100/day:	$300
	$4,440

2. Office

Office supplies:	$180
Photocopies:	$100
Telephone:	$95
	$375

3. Production

Photocopying: 500 copies of 30-page booklet:	$600
Binding: 500 copies @ $0.08:	$40
	$640

4. Other

Travel expenses:	$410
	$410

TOTAL BUDGET: **$5,865**

9. Anticipated results and evaluation

Describe the project's end product. How many people will benefit and how? What will you have to show for the time and money invested? What impacts in public awareness, data base, legislation or services can be expected? Quantify your results. Explain the evaluation plan for the project. You are showing the funder you are committed to producing tangible results.

Explain the method(s) you will use to evaluate the project. Decide who will be responsible.

10. Distribution and dissemination

Explain how the community will become familiar with your project's result.

Are you going to develop a pamphlet? Will it be distributed to families in your community by volunteers? Give a bulk quantity of the pamphlet to key organizations for them to distribute it among their peers? Are you planning on promoting your product through the local radio or give accessibility through the Internet? Are you planning on doing an official launch during a special event? Are you

holding meetings to heighten public awareness regarding the problem in order to find a solution?

Demonstrate clearly to sponsors that the money will be well spent and that community members will benefit from the results of the project. Demonstrate that your work will improve the health of community members.

11. Future funding

Funders want to know how you will continue your project once their contribution expires. It is important to be reassuring. For instance, you could demonstrate that the services you provide or sales of your products (book, video, lecture series, etc.) will enable your project to become self-supporting. It is also possible that a community organization may decide to support your project if it proves to be successful. Attach any letter of support or of future commitment from an organization.

12. Recommended appendices

You can attach the following to your proposal for funding:

- charts longer than one page;
- your group's organizational chart;
- team members' résumés;

- brief description of the team's relevant accomplishments;

- written commitment from other funders;

- brief history of your organization;

- list of the administrative board members, including their addresses and telephone numbers;

- letters of support from well-known and respected people or organizations;

- brochure, advertising material, relevant news items; and

- any other material you consider pertinent.

General comments

a) Present the proposal on your organization's letterhead or quality paper. Make sure your proposal is presented in an attractive and practical manner. If need be, place a separating sheet between each major section with a protruding tab to identify each section title.

b) Make sure you tailor your proposal to the specific requirements of the ministry, organization or foundation whose support you are requesting.

c) Have your proposal proofread by outside readers. The ideal people would be:
   - a competent writer;
   - a competent secretary to check spelling, layout, etc.;
   - an expert in the pertinent field; and
   - an accountant.

d) Include a cover letter in your proposal that:
   - outlines the content and refers the reader to the summary;
   - makes a specific request (for funds, materials, etc.);
   - is signed by the most senior person in your organization or a person interested in your cause.

e) Complete these documents and present your request as early as possible.

f) You can consult Appendix F before sending your proposal.

In conclusion

The work you have done in assessing your needs, formulating goals and objectives, and elaborating your action plan will give you a head start in preparing your proposal.

c) How to approach businesses

Here is some information that may be of help when approaching businesses:

In small communities

Small industries and local businesses are part of your community. Plant managers and independent owners may not be aware of how to give to charities, so you might have to work at raising their awareness on the importance of making charitable donations.

A good strategy might involve speaking to business groups and politicians on the importance of volunteer work and donations to charitable community organizations. The time investment will not produce immediate results, but it usually pays off in the long run and gives your organization greater visibility.

Consult your shopping list before meeting with small businesses or industries. Keep in mind you can ask for other forms of assistance such as technical and professional services, sponsoring, materials, industrial products, etc.

Large businesses

Large businesses are literally swamped with requests for donations. As a result, it is important to know exactly what your organization needs.

With business people, be business-like:

- Find out if there are guidelines for making a request or a form to fill out, and if there is a specific time period to submit a proposal. Try to find out what the average contribution is and if other forms of support are possible.

- When presenting your request, take time to explain:
  - the goal;
  - the need;
  - past successes;
  - anticipated results;
  - your specific request;
  - how you will ensure follow-up; and
  - your budget, in clear and precise terms.

- Provide all documents rapidly.

- If you have been granted money from other sources, do not hesitate to tell them. They will be encouraged to know that other organizations are supporting you.

• Send thank-you letters and short progress reports. This is an excellent way to keep the business informed of your work and show them how useful the money has been.

d) How to successfully organize a special event

If you live in a small community

Special events, such as auctions, swim-a-thons and benefit dinners, tend to be popular ways to raise money in small communities. In some places, special events may be the only method of fundraising people know.

Special events can be an effective vehicle for promoting your group or recruiting new volunteers.

These activities require a lot of work, they require money to get started and require a lot of energy from your volunteers. Therefore, it is important to be clear about your objectives and choose your fundraising activities to suit those objectives. If your main priority is raising money, it might be better to use your time to solicit individuals.

If you decide to hold a special activity, here are some tips for getting the most out of the event.

How to make more money during a special event

Here are seven tips taken from the following resources:

• *A Guidebook to Fundraising for Disabled Persons' Groups,* published by the Department of the Secretary of State of Canada;

• *Guide to Special Events Fundraising*, published by Multiculturalism and Citizenship Canada.

1. Provide blank cheques and pens to participants

Experience shows that distributing blank cheques increases the amount donated. It's a good idea to give a presentation on the importance of your activities in undertaking to resolve a community problem. Warmly thank your audience for their contribution.

Here is a model of a blank cheque you can modify to suit your purposes. It is recommended you check with a financial institution in

order to avoid high service fees for your donors for using cheques that were not issued by their usual institution. If there are fees, make sure you inform your donors.

THANK YOU!		☐ **YES I WANT TO HELP** (Write your organization's name)
Date _____	T	Name _____ Date _____ 19 ____
Amount $ _____	E	Address _____
	A	City _____ Prov _____ Postal code _____
Donation to	R	Phone ( ) _____
YOUR ORGANIZATION'S NAME		
123 Any Street Bigtown, Pro. A1A 1A1 Phone (123) 555-1234	O	Pay to the order of NAME OF YOUR ORGANIZATION AMOUNT $ _____ SUM OF _____ / 100 DOLLARS
A government registred charity #12-13-4567890	F F	Bank _____ Branch _____ ACCOUNT NUMBER _____ SIGNATURE _____

2. Get things free

Many organizations are willing to provide items or services for special events.

3. Hold an auction

People like to participate in auctions. They feel like it's an opportunity to help and to have fun, all at the same time.

Try to find items to sell that are fun. Services can also be sold quite easily: for instance, a dinner prepared by a talented volunteer, gardening with a "green thumb", etc.

Try to get a good auctioneer and, if possible, someone with a good sense of humour. Alternate between expensive objects and amusing items that can be sold for less.

Organize a silent auction! Display the objects and attach a piece of paper or cardboard to each one. Bidders write down the amount they are willing to pay and sign their name or a secret code number. People can bid as many times as they like for a given object by writing a higher bid than the previous one.

You can spice it up by setting a time limit for certain objects. By keeping this information secret, you

will encourage participants to raise the bid because they will not know when bidding will close on the item they want.

4. Find sponsors

Of course, gifts of goods and services will not eliminate all of your costs. Rather than paying such expenses out-of-pocket, find a sponsor that is willing to pay all or part of your costs in exchange for publicity.

5. Print a program

Print a program of the activity. This is very useful for a variety of purposes, especially if you manage to get it printed free of charge. You can use it to:

- thank donors and volunteers;
- sell it, quality permitting;
- provide information on your organization; and
- sell advertising to groups other than your donors.

6. Combine methods

Try to combine ideas and organize several profit-generating activities at once.

It takes a lot of work to attract people to an event, so while they are there, make sure you give them several different ways to fund your activities!

7. Recycle ideas

The first activity you organize is likely to raise a bit of money and to be a good opportunity to learn from your mistakes. Organizing a special event is similar to launching a business.

Too many organizations waste energy trying to come up with new ideas. It is true that some activities do get worn out from over use. However, this does not happen as often as people think.

It is better to succeed by repeating a proven method than to fail by inventing something new. In fundraising, it is **productivity**, not originality, that counts. So the best advice seems to be improving successful events, rather than coming up with new ones.

Stay at home!

If you prefer not to organize a special event, you can always raise

Here are some examples of combined activities:

- If you are showing a movie, sell popcorn, cookies or refreshments.

- If you are organizing a show, have a singing or dancing contest during intermission.

- Take souvenir photos. For $5, people could have their photo taken with a guest, for $20, it could be in the company of one of the stars, etc. Try to get the camera and film donated, or ask a photographer to work as a volunteer for the evening.

- Sell flowers that decorate the table or the room.

- During a special comedy show, arrange to have a public figure "jailed" (in a cardboard jail) for having done something silly or funny (for example, going to work on a holiday). Ask participants to put up bail to have him or her released. Some people may want to pay to have him or her **kept** in jail!

money by selling tickets in your community for a "stay-at-home!" activity.

People buy a ticket to a non-event, entitling them to stay home and relax. Explain how much money the charity is saving by not organizing anything special. Point out how much the donor saves by staying at home (no babysitter to pay, no parking fees, etc.). You could give donors a bag of tea to drink during this non-event.

e) Legal aspects to consider

Some funding activities require authorizations, permits or other legal documents issued by the municipality or government. It might be wise to make inquiries before organizing any activities.

When do you need to charge participants tax and reimburse it to the government? When can you issue a receipt for tax deduction when a donation is made? The Ministry of Revenue has the answers to such questions.

If you are organizing an athletic, social or cultural event, the organization can be held responsible for participants, spectators or the family of a victim in the case of an accident. So take all the necessary precautions!

APPENDIX A

VOLUNTEER APPLICATION FORM

We are happy to know you would like to work for us as a volunteer. To help us get to know you better, please answer the following questions.

Name _____

Address _____

_____

Telephone number at work _____

The best time to contact me there _____

Telephone number at home _____

The best time to contact me there _____

Birth date _____

Education _____

Spoken languages _____

1. How many hours can you volunteer?

    a) Number of hours a week _____

    b) Number of hours a month _____

    c) Please circle the days you are available

        M   T   W   T   F   S   S

    d) Please indicate the best time for you

        mornings _____   evenings _____

        afternoons _____   weekends _____

2. Please explain why you want to volunteer for our organization
    (e.g., to meet people, acquire experience, because this is an important
    cause).

    _____

    _____

    _____

3. Briefly describe the jobs you have held (paid or volunteer).

    _____

    _____

    _____

4. What kind of volunteer work would you like to do?

    _____

    _____

    _____

5. Are you a member of any social clubs or associations? If yes, which ones?

    _____

    _____

    _____

6. What are your hobbies and interests?

    _____

    _____

    _____

7. Please add any other information you think is important.

_____

_____

_____

To help us find a volunteer job that suits you, please fill out the form WHAT I LIKE DOING.

Thank you for taking the time to fill out this questionnaire.

_____   _____
Signature   Date

<div align="right">

APPENDIX B

</div>

WHAT I LIKE DOING

We want your participation in our organization to be as pleasant as possible. You can help us by indicating what YOU like to do.

Thank you!

NAME _____

ADDRESS _____

TELEPHONE NUMBER _____

THINGS I LIKE DOING	ALWAYS	SOMETIMES	NOT AT ALL	COMMENTS
Addressing groups				
Administrative tasks				
Advertising				
Bookkeeping				
Building or repairing objects				
Cooking				
Dancing and singing				
Decorating				
Defining group orientations				
Distributing information				
Doing research				
Drawing				
Driving people				
Facilitating meetings				
Filing documents				
Fundraising				
Having responsibilities				
Initiating projects				

THINGS YOU LIKE TO DO	ALWAYS	SOMETIMES	NOT AT ALL	COMMENTS
Leading sweetgrass ceremonies				
Making decisions				
Managing human resources				
Meeting new people				
Organizing nature walks with Elders				
Organizing sweatlodges				
Organizing volleyball games				
Outdoor activities				
Playing musical instruments				
Problem solving				
Public speaking				
Reading				
Researching				
Selling things				
Sports				
Taking care of children				
Taking charge of a healing circle				
Taking charge of a self-help group				
Teaching				
Typing				
Welcoming people				
Working with adolescents				
Working with adults				
Working with computers				
Writing texts				
Others (specify)				

Thank you for filling in the form.

Please return to: _____

APPENDIX C

VOLUNTEER PLACEMENT FORM

Name: _____

Preferences (needs, expectations, skills):

_____

_____

_____

Proposed placement: _____

_____

_____

Comments: _____

_____

_____

Follow-up:

Date	Carried out by	Comments
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

_____   _____
Signature   Date

APPENDIX D

EVALUATION GUIDE

Here are examples of evaluation questions. You can use them to make an individual or group evaluation.

They can also help you prepare a written questionnaire for your annual evaluation.

Do not hesitate to adapt them to your context and needs.

1. Are you satisfied with the work you have accomplished for our organization?

2. Do you like the work you have done?

3. Are you satisfied with the direction of the work you have done for us?

4. What have your greatest successes been?

5. What have your weak points been?

6. Have you faced obstacles that have put you at a disadvantage in your work? What have they been?

7. How could these obstacles be eliminated?

8. How do you feel as a member of our organization? Do you feel people listen to you? Do you feel respected? Do you feel useful?

9. Do you have any suggestions for making improvements?

10. Are there problems which concern you?

<div align="right">**APPENDIX E**</div>

CHECKLIST OF INFORMATION NEEDED
BEFORE WRITING A FUNDING PROPOSAL

Preparing a funding proposal requires a lot of work. Before starting, you should have the answers to the following questions.

❑ Does the project meet the funder's eligibility criteria?

❑ What categories of expenses are eligible (e.g., travel, salaries, equipment, conference participation)?

❑ How about overhead costs? Can they be included in the budget?
If so, in what category, how much, and what is the proper terminology?

❑ How detailed should the proposal be? What is the generally accepted length? Should any special information be included? Are letters of support useful?

❑ How many copies of the proposal should be sent?

❑ Is there a set date and time for submitting the proposal?

❑ What are the evaluation criteria for proposals? How are projects selected for funding? How long will it take to get an answer?

❑ If the proposal is approved, how will the funds be transferred? How soon can they be expected after the decision?

❑ Who will own the copyright for any material produced (if applicable)?

❑ Is the grant renewable? How should it be negotiated?

If the project is rejected by the organization, ask why.

APPENDIX F

CHECKLIST TO CONSULT BEFORE SENDING
A FUNDING PROPOSAL

Here are the questions we suggest you try to answer before sending in your funding proposal.

❑ Did you use the most up-to-date application guidelines?

❑ Does the proposal reflect the importance of the project?

❑ Do the various sections and categories in the text follow each other logically?

❑ Is the problem clearly defined?

❑ Are the project goals and objectives stated?

❑ Is the methodology presented in sufficient detail?

❑ Are the expected results described?

❑ Are the team members' responsibilities clearly defined?

❑ Can your organization realistically accomplish this project?

❑ Can you accomplish the proposed work with this budget?

❑ Has the budget been double-checked?

❑ Do you have all of the necessary signatures?

❑ Have you included all of the support information (e.g., charitable organization registration number, letters of support, résumés, all appendices)?

❑ Are all of the required forms completed and included in the proposal?

❑ Does the presentation reflect the high quality of work expected for the project?

❑ Are the pages numbered and in correct sequence?

❑ Do you have the right number of copies for the funding agency?

❑ Is the proposal properly addressed?

❑ Does the proposal respect postmark or receipt deadlines?

❑ Do you have receipts as proof of the mailing date?