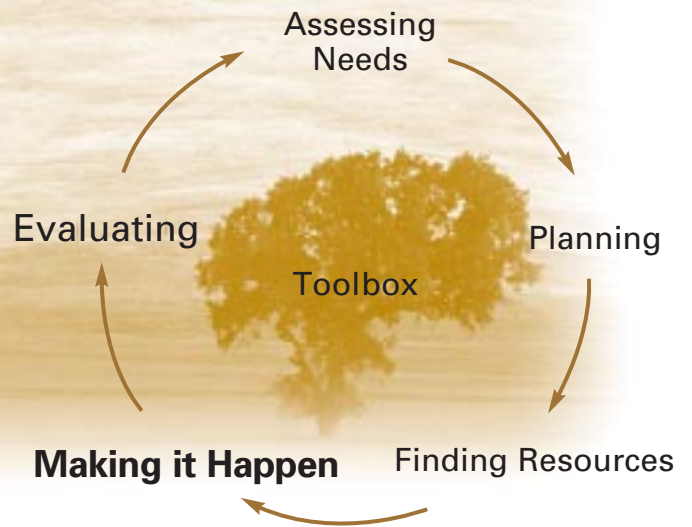




Community Action Resources for Inuit, Métis and First Nations



Making it Happen



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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.



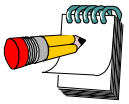
Look for the following symbols.
They will help you apply your skills
and knowledge.



tips



examples



exercises

What is a community?

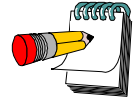
Let's take a moment to think about the word "community". Communities are not just a question of geography. People in a volley-ball league can be a community. A support group can be a community. Members of a church can be a community. Communities are people with something in common, something that is 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.

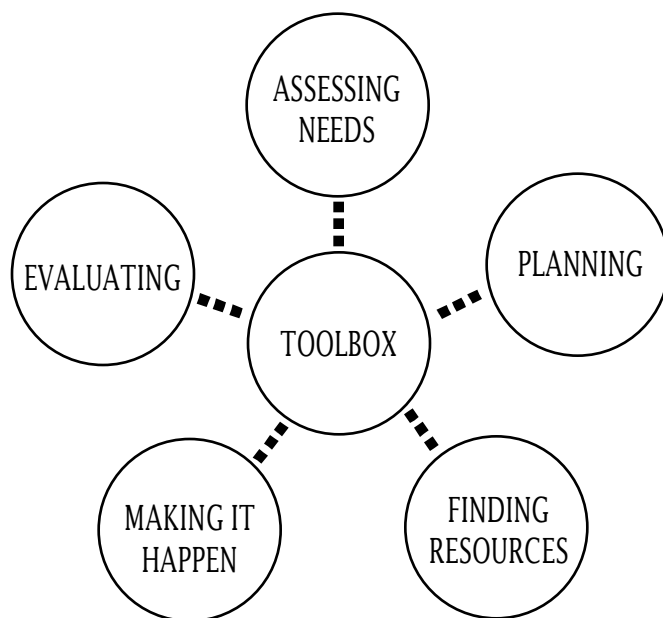
Starting a new activity is like planning a trip to a place you have never been.

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.



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 MAKING IT HAPPEN

Implementation

You are carrying out a community development project. You have assessed the community's needs, and now you know why and for whom your project is being developed.

You have set the project's goals and objectives during the planning phase. Your workplan has been established. Now you are ready to go ahead with activities. The manual on making it happen should help your project move forward by providing you with information on:

- teamwork
- budgeting
- accounting
- promotion.

Since these activities can be useful during all stages of the process, you may already have begun some of them.

This manual is yours and it is up to you to adapt it to your needs. You may choose to read it from cover to cover to get an overview, or you

may want to read only the pages that correspond to your current needs. If you find some parts hard to understand, you can come back to them later. It is up to you to decide how you want to use it!

Training goals

The training presents a systematic approach for carrying out your projects.

Its aim is to give you ideas about “how” to do things with the help of techniques and tools.

Objectives

At the end of this training, you should be able to apply the principles of:

- teamwork
- basic budgeting
- basic accounting
- project promotion.



II. TEAMWORK

Working groups

A working group is one of the most precious resources.

A group evolves from the initial contact between individuals to the point at which members are able to accomplish productive work, having established some ground rules for getting things done.

Making a project or activity happen gives members the opportunity to get to know each other and to learn

how to work together. The satisfaction and pleasure participants get from being together and organizing activities can be important sources of motivation. Working together also helps create ties that will be helpful for making it through the tough times that can arise in any project.



Associations with other groups

Different types of associations

There are many different ways for organizations to associate with each other in informal or official capacity. For example you could:

- form an official group with a head office made up of representatives of member organizations;
- open a new office with one or more organizations;
- become part of a network of collaborating organizations to get support for your organization's activities;
- set up an informal group that meets as needed; or
- establish a network of contacts for sharing information on a regular basis.

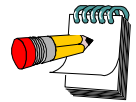
Associations and collaborations can be formed on a variety of bases, such as:

- where your organization is located;
- clientele; and
- type of activities.

The advantages of networks

Associating and creating networks has many advantages, especially in terms of savings (time, resources and money) and sharing information. For example, you could:

- take advantage of an existing group's secretarial services and office;
- hire staff and consultants who offer their services to more than one organization;
- make joint purchases to save money;
- keep each other informed of the dates of your respective activities so they do not overlap;
- get together for training sessions;
- share ideas on a variety of subjects (conducting meetings, fundraising, etc.);
- join forces on specific issues;
- publish a joint newsletter; and
- share offices and maintenance costs.



Are there other advantages in associating with other organizations?
List them here:

-
-
-
-

Are there any disadvantages for your organization in associating with
other groups or organizations in your community? List them below:

-
-
-

Associating with other organizations in your community can have some disadvantages. However, they are usually outweighed by the advantages of being part of a network.

Groups that are ready to make things happen can use several different strategies. In the next sections, we will discuss committees and task forces.



Committees

Types of committees

There are two types of committees:

- standing (or statutory) committees: They are created by the organization's statutes or regulations. They exist and function on a more or less permanent basis. For example, finance, education, volunteer recruitment, etc.; and
- ad hoc committees: They are created for a specific reason. Once their objectives have been reached, this type of committee is dissolved.

Committees' responsibilities

Committees can have several responsibilities. Some examples may include:

- reviewing expenses;
- elaborating programs and policies;
- finding and developing resources;
- administrating the association;
- recruiting and training volunteers;
- managing staff;
- managing communications, advertising and public relations; and
- managing government relations.

The advantages of forming committees

Forming committees can have several advantages, such as:

- allowing participants to share responsibilities;
- making group work more efficient;
- involving a greater number of people;
- overseeing and training new members by pairing them with more experienced members; and
- examining issues in greater depth.

Creating committees

Committees are a good way of getting things done. However, you will have to invest some time in setting them up, and your time is precious. So you will have to determine the necessity of a committee.

If you are unable to put down in writing the reasons for forming a committee, it is probably not necessary.



Here are some questions that might help you define a new committee's mandate:

- What is the committee's goal?
- What are the main objectives?
- What are the responsibilities and limits?
- Does the group have authority over the issue entrusted to it?
- To whom is the group reporting? Is it accountable to the whole community?
- What are its specific tasks?
- When are the results expected?
- Will it need to produce a report? If so, what kind? When?
- How many people will be involved?
- Who will be involved? How are members appointed?
- How are responsibilities distributed?
- How will leaders be chosen? What will their responsibilities be?
- How long will the members' mandate last?
- What facilities, equipment, services, etc. can they use?
- Can they seek their own sources of funding?

- Will they be expected to have their own budget and accounts?
- Will there be sub-committees?
- How often will meetings be held?
- What situations or problems will require a meeting?
- How will decisions be made?

Your answers to these questions will help you decide if a committee needs to be formed. They will also help you establish how the committee will function.

It is a good idea to put this information in writing so that all committee members understand the purpose of the committee. A clear vision, shared by all members, will help the group reach its objectives harmoniously and will help prevent misunderstandings.

Signs of a healthy committee

Here are some signs that a committee is working well:

- Everyone understands the committee's purpose (and how it will help the organization reach its goals).



- It is made up of members who are recruited based on their abilities.
- Time is used efficiently, both in terms of the length of meetings and the committee's overall development plan.
- Members respect each other, take each other's needs into consideration and communicate well with each other.
- Training is provided to members who need it.
- The president and members prepare meetings carefully.
- Members are interested and feel committed.
- Minutes are thorough and concise.
- The committee evaluates its work periodically.
- The members' work efforts are acknowledged and appreciated.

Task forces

Task forces are a special kind of committee. As the name indicates, they are formed to tackle a specific task, for example, organizing a special activity as quickly as possible. They are characterized by

a major energy investment over a short period of time.

People who are part of such a group must be active, determined to take things into their own hands right away, well organized, focused on the work at hand and able to respect time constraints.

Conflicts

Conflicts are an inevitable part of living in a group and in society. In fact, when something changes, it inevitably creates tension somewhere. If change and conflict were avoided, nothing would happen.

Pressure due to deadlines, unexpected events, personality differences, limited budgets, unrewarding jobs can all lead to conflicts between people. This is normal! If you are facing such difficulties, you need to know that these are normal.

Groups that know in advance that conflicts may arise are better prepared to deal with them constructively when they do occur. However, whenever possible, nip conflicts in the bud. If they are left unresolved, they may become out of



control. The “Conflict Resolution” section in the “Toolbox” manual deals with the various types of conflicts and how they can be resolved so the group can evolve in a positive direction.

The “Stages of Group Development” section, also in the “Toolbox”, explains the stages most groups go through during their existence. This information can help you foresee difficulties and have more control over the situation.

Remember

Work groups are important parts of projects.

It is a good idea to clearly define what sort of networks your group intends to develop with other groups or projects in your community. Forming networks with other organizations usually has many advantages.

If you feel your group is becoming too diversified or that its structure seems cumbersome, you might want to think about forming committees. They can be of great help in dealing with specific tasks.

The best structure for starting up an activity or for making quick changes in a situation is a task force. It must be made up of people who want to take action quickly.

Conflicts within groups are inevitable, but they can usually be worked out to everyone’s satisfaction. Knowing the stages of group development can help you take appropriate action.



III. BUDGETING

What is a budget?

A budget is a tool for planning the revenue and expenses created by the activities. These are necessary for achieving your project's goals.

More specifically, it is a written plan, in dollar amounts, that estimates revenue and expenses over a given time period (usually one year).

There can be a budget for your organization's administrative activities and separate budgets for specific projects. An activity, for example, doing a survey or preparing a pamphlet, could have its own budget.

A bank budget is a special kind of budget. It charts revenue and expenses based on when you receive funds and when you make payments. It is a very convenient tool, since it helps you check whether or not funds are being deposited in time to pay expenses!

Why prepare a budget?

When a budget is prepared at the beginning of a financial exercise, it indicates how you want to allocate resources according to your priorities and objectives. It helps you save the most resources for the most important activities.

Once you have established the year's expenses (for example, paying salaries or purchasing computer equipment), the budget helps control the rate of spending and the maximum amount allotted for each item. In this way, a rapid increase in spending can be stopped by regular controls.

At the year's end, the amount allotted to each item can be compared with the actual amount spent. This exercise can help you plan whether more or less funds are needed for the next year.



How to prepare a budget?

Your organization’s short- and long-term plans have been set. You know your priorities, goals and objectives, as well as the activities that will enable you to fulfil them. Now you are ready to prepare your budget.

Usually, a budget is prepared by your organization’s secretary-treasurer, in consultation with the people responsible for the various

programs or activities. It is presented for approval to the appropriate authority, usually the administrative board.

To prepare a balanced budget, you will have to invest some time and plan for consultations. It is best to start planning the budget several weeks before it has to be submitted for approval.



Some organizations simply take their budget from the previous year and add to or subtract from the various items based on either inflation or variations in grant money.

This is not really effective, because it does not take into account actual income and spending. Also, it does not reflect changes in the organization’s priorities and objectives and can lead to expenditures on activities that have become useless or ineffective. It does not take into account the changing needs of the different activities.

It is a good idea to establish an activity calendar that indicates who is responsible for what and by what date. Deadlines can be established by working back from the date the budget will come into effect so that everything is done on time.

The process of budget preparation presented here may seem elaborate, but it will help ensure that your funds are spent in a way that will

give you the best chance of achieving your organization’s objectives.

The budget preparation process involves three main steps:

1. gathering the necessary information;
2. preparing a draft budget; and
3. adopting a final budget.



1. Gathering the necessary information

Getting the necessary information means placing the budget in context. The budget must always take your organization's goals and objectives into consideration. Several factors can influence your budget. They can be found by consulting:

- a) written documents
- b) people in your organization.

a) Written documents

You can study documents such as:

- annual reports
- past budgets
- accounting journals
- financial statements
- administrative guides
- documentation on your programs.

All these documents can provide you with essential indications as to your budget's orientation by

highlighting what your organization has accomplished, what members wish to accomplish and how it should be done.

b) People in your organization

The budget must be prepared in consultation with the people responsible for programs and activities, since they are in the best position to know about the activities being planned in their areas, clientele, prices, quantities of materials needed, etc.

There are different ways to get the necessary information for preparing the budget from those concerned.

You could:

- organize a group meeting to discuss the budget;
- meet with program or activity organizers individually or contact them by phone; or
- hand out a request form to fill out and return once they have thought about their needs for the coming year.

Try to involve those who will be using the material and financial resources throughout the entire process. If they have helped prepare the budget, they will likely be more careful to stick to it. In addition, they can help find solutions if resources are insufficient for everyone's needs.





In the Appendix, you will find a sheet that you can photocopy and use to get information on the needs of the different programs or activity sectors.

2. Preparing a draft budget

Now that you have all of your material, you can prepare a draft of your budget.

You will need to determine what kinds of revenue (donations, grants, sales, etc.) and expenses (salaries, telephone, rent, etc.) should appear in the budget. You need a realistic estimate for each type of revenue and expense, otherwise your budget will lack credibility. To help determine the amount you need for each budget item, here is a list of questions to ask:

- How much has been received so far this year?
- How much do you expect to have received by the end of the year?
- How much have you spent so far this year?
- How much do you expect to have spent by the end of the year?

- What needs have been expressed by the people involved?
- Have some needs decreased or are no longer needed?

If your preliminary calculations show a deficit, you need to work on balancing your budget. This can be done in several ways:

- by decreasing spending;
- by finding new resources or new sources of funding; and
- by borrowing funds.

This financial exercise needs to be closely examined, based on your objectives and what is possible.

3. Approving the final budget

Concerned parties will discuss and analyse the draft budget. Some adjustments and corrections may be necessary, such as:

- rethinking some activities;
- planning for more volunteers;
- finding new sources of funding; and
- reducing some expenses.

Once the adjustments have been made, you can submit the final version of the budget for approval.



Example of a budget

Here is an example of a simplified budget that might help you prepare a budget:

Organization title		
PROJECTED BUDGET FOR THE COMING YEAR		
Revenue		
Donations	\$ 500	
Grants	\$ 900	
Membership fees	\$ 200	
Sales	\$ 900	
Total revenue		\$ 2,500
Expenses		
Supplies	\$ 300	
Telephone	\$ 500	
Bank fees	\$ 50	
Travel expenses	\$ 700	
Articles for sale	\$ 400	
Professional fees	\$ 450	
Total expenditures		\$ 2,400
Net income (deficit)		\$ 100

Net income is the difference between revenue and expenses, when there is more revenue than expenses. When expenses are

greater than revenue, there is a deficit. It is standard procedure in budgeting and accounting to indicate deficits in brackets.

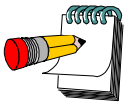


You can use the following exercise to prepare a fictional budget chart. It could be your budget estimate of a project you already know or a project you are planning.

List the revenue and the expenses in the left-hand column.

Attribute a dollar value to each item in the list (right-hand column).

Then, calculate whether revenue is greater than expenses (surplus budget) or, on the contrary, less than expenses (deficit budget).



Organization title	
PROJECTED BUDGET FOR THE YEAR _____ (\$)	
Revenue	
Types	Amounts
_____	_____
_____	_____
_____	_____
_____	_____
Total revenue	_____
Expenses	
Types	Amounts
_____	_____
_____	_____
_____	_____
_____	_____
Total expenditures	_____
Net income or (deficit)	_____



Do you have a good budget?

A budget can be very difficult to prepare, especially if you are not sure of your incoming funds. It can create a lot of uncertainty and tension for everyone in the organization. Having to budget very carefully in an atmosphere of uncertainty can force you to make difficult choices.

Also, a budget can be well thought out financially, but if no one understands it or is willing to accept it, it will not be very useful.

The following questions can help you evaluate your budget:

- Is it based on your organization's goals and objectives? Will it help you fulfil them?
- Was it prepared far enough in advance to have been sufficiently evaluated and discussed before being approved?

- Is it realistic? Does it leave room for unexpected expenses?
- Does it include everything you want to do during this period?
- Is it clear enough? Are you able to explain it well enough so people can understand it without too much difficulty?
- Is it well accepted by the people who participated in the process?

If the budget cannot meet everyone's expectations, it may create dissatisfaction. This is one of the hardest parts of preparing a budget. With the help of interested people, you should be able to find acceptable solutions.

If you are uncomfortable preparing your budget by yourself, try to get help.





IV. ACCOUNTING

While budgeting is an exercise in financial planning and forecasting, accounting involves regularly updating your financial activities.

What is accounting?

Accounting involves two main categories of activities:

- bookkeeping
- establishing financial statements.

Bookkeeping helps you keep track of your current operations. Financial statements are based on your books. They give you an overview of your financial situation at a given point in time.

The process presented below aims to better acquaint you with the accounting process. Only the most important notions are presented.

Why keep books?

Your accounting books are a part of your organization's memory. They can help you be up front, clear and credible in the eyes of your members, sponsors and donors.

All of these people are interested in knowing where your resources come from, and how they are being spent and/or invested. They also want to know if resources are wasted. Your organization's credibility among its supporters (both sponsors and the community) is important.

Accounting also helps ensure the budget and resources will remain at your disposal. It can help you avoid dropping all or part of the project because resources are no longer sufficient. Therefore, it too is a tool to help you fulfil your objectives.

Accounting answers some basic questions, such as:

- Where do resources come from?
- Where do they go?
- What do you have?
- How much do you have?
- How much have you spent?
- How much do you owe?
- Whom do you owe it to?

Accounting allows you to see if your resources are being used as planned in your budget. If they are not, accounting can help you correct the situation before it's too late.



How to start?

To start your books, we recommend you get the help of a professional. It is not essential, but it could save you time in the long run. Your bookkeeper should have the necessary knowledge.

Accounting will be easier if you:

- use a bank account in which all your revenue is deposited and from which all your payments are made (It is preferable to pre-number your cheques. You will receive a monthly bank statement of all deposits and withdrawals. The bank will return your cheques once they have been paid from your account.);
- save and record the cheques you have voided (You should be able to trace both voided and deposited cheques. This will avoid much uncertainty.);
- keep petty cash (Petty cash pays minor expenses, saving receipts for reimbursement by the bank account.); and
- have two signatures on cheques as protection for everyone (For the same reason, avoid signing blank cheques.).

Current operations and bookkeeping

Bookkeeping is done in journals with columns corresponding to different accounts. You write down information about your transactions in the relevant column. Examples are provided in the next pages.

There are different models of journals available in stores.

It is up to you to determine which accounts are most convenient for you. If you have almost no telephone or mailing costs, you could group the two together under office supplies. However, if they constitute your three main costs, you are probably better to keep them separate.

Your aim is to record enough detail to indicate what your resources are being used for.

You can base the accounts in your journals on those in your budget. In any case, it is helpful to be able to compare your journals to your budget.



Depending on the number and complexity of your transactions, you may decide to have one or more journals.

You could choose to have journals on the following subjects:

- petty cash
- expenditures
- revenue
- assets and equipment
- purchases
- sales.

If you have several journals, you will need one general journal in which all your information can be found. The details are in the specific journals and the sums are transferred into your general journal.

We will take a look at four types of journals:

- the petty cash journal
- the expenditures journal
- the revenues journal
- accounting with a general journal.

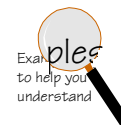
a) Petty cash

Petty cash is a sum of money to be used for paying small amounts that would be tedious to pay by cheque, (e.g., a box of pencils).

It can amount to \$25, \$50 or \$100, depending on your monthly needs. You should establish a maximum amount for purchases made with the petty cash (for example, \$15 for a \$100 petty cash).

Here is a simplified example of a petty cash journal:

date	transaction	Expenses			
		paid	pencils	photocopies	etc.
05-14	bill#pc1	2.50	2.50		
05-28	bill#pc2	12.00		12.00	
End-of-month balance		14.50	2.50	12.00	





In the above example, there is now \$14.50 less in the petty cash. This amount now needs to be either reimbursed to the petty cash or recorded in the petty cash journal. In that case, you record the bills that were directly paid in your expenditures journal or in your general journal (which we will see further ahead). The petty cash should usually be reimbursed before it is completely used up so there is always some cash readily available.

All invoices/receipts should be saved and the items purchased should be clearly indicated.

When the cash and invoices are added up, the petty cash always contains the same amount. The total sum of money should be

sufficient to cover all minor costs over a short period of time. One month is usually considered practical. In addition, it makes it easier to gather and check the invoices while the operations are still quite recent.

In the next few examples, there is no petty cash journal. This is usually the simplest method. If you do have such a journal, it has to be balanced just like a bank account. The only difference is that there are no cheques circulating (see "Bank reconciliation below").

b) The expenditures journal

In this journal you, record all transactions involving expenditures. Here is a simplified example:

			cash balance		expenditures	
date	transaction	ch.#	bank	petty cash	telephone	supplies
05-14	petty cash	23	(20.00)	20.00		
05-30	telephone	24	(18.60)		18.60	
05-30	bill pc1, pc2	25	(14.50)			14.50
	•					
	•					
End-of-month balance			(53.10)	20.00	18.60	14.50



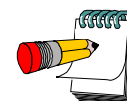


Unlike the petty cash journal above, “pencils” and “photocopies” are grouped together under “office supplies”. The amounts indicated in brackets are subtractions or deficits. The cash balance is made up of the cash at your disposal.

Here is a list of expenses likely to appear in your accounting:

- travel expenses;
- meals and accommodation;
- renting boardrooms;
- equipment rental;
- equipment maintenance;
- bank fees;
- service contracts (computers, etc.)
- professional fees (accountants, lawyers, etc.)
- salaries;
- telephone, including long distance costs;
- stamps and mailing costs;
- transportation;
- graphics;
- printing and reproduction of documents; and
- advertising and promotion.

If you want to practise, you can record transactions or add others to those already given.



			cash balance		expenditures	
date	transaction	ch.#	bank	petty cash	telephone	supplies
	•					
	•					
	•					
	•					
	•					
End-of-month balance						



c) The revenue journal

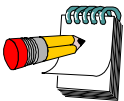
This is where you write down all transactions involving revenue.

Here is a simplified example:



		revenue			
date	transaction	bank	donations	sales	etc.
05-14	from Jean P.	50.00	50.00		
05-23	sale to Chantal D.	70.00		70.00	
	•				
	•				
End-of-month balance		120.00	50.00	70.00	

You can write down your own transactions in the space below:



		revenue			
date	transaction	bank			
	•				
	•				
	•				
	•				
End-of-month balance					



d) Accounting with a general journal

If your operations are fairly simple, you may choose to keep just one book. This would replace the

expenditures journal and the revenue journal presented above:

date	transaction	ch#	cash balance		revenue		expenditures	
			bank	p.c.	don.	sales	tel.	supp.
05-14	p.c. payment	23	(20.00)	20.00				
05-14	don. J.P.		50.00		50.00			
05-23	sale J.D.		70.00			70.00		
05-30	tel. payment	24	(18.60)				18.60	
05-30	pay. #pc1 pc2	25	(14.50)					14.50
End-of-month balance			66.90	20.00	50.00	70.00	18.60	14.50



Double accounting

You will have noticed that all the above amounts were written down twice: once to indicate where the money came from (for instance, a donation) and once to specify how it was used (for instance, a bank deposit). This is double accounting, the most commonly used method. The amounts recorded may not be equal: you could add together two or three invoices from a store and pay them all with a single cheque. In that case, you would indicate the items in the appropriate spaces in

your expenditures column. You just need to make sure the amount indicated for the cheque corresponds to the total expenditure you recorded.

Assets, liabilities, revenue and expenses

“Bank” and “petty cash” accounts are part of what you use to spend money, make investments, etc. That is why they are called **assets**.



The other accounts mentioned above are called, respectively, **revenue** and **expenditures**. They indicate where your money has come from without borrowing (in the above examples: donations and sales) and where money went (in the examples: telephone and supplies) during a given period of time.

A third category of accounts are debts, which can put you at a disadvantage, unlike your assets. They are referred to as **liabilities**.

When you compare your assets to your liabilities, the two are not necessarily equal. You can have \$1000.00 worth of assets and owe only \$600.00. The difference between the two amounts represents your **capital** which, in this case, would be \$400.00. This amount remains with the organization. This is the amount that would remain if all activities were shut down, assets sold or liquidated, and liabilities (debts) reimbursed.



Therefore:

$$\text{assets} = \text{liabilities} + \text{capital}$$

Knowing your financial situation

Your books can provide you with a picture of your financial situation. They are updated on a regular basis. Your financial statements reflect your situation for a given date or for a given period of time.

We will discuss three elements:

- the statement of income and expenditures;
- bank reconciliation; and
- balance sheet.

a) *Statement of income and expenditures*

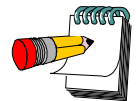
This first financial statement updates your income and expenditures. This can be established either for the whole year to date or for a period of time (usually one month). Follow the examples on the next page.

These figures correspond to numbers in the monthly balance, in the example of the general journal. The surplus of - \$86.90 - corresponds to the increase in the amount of cash on hand during the month.



Statement of income and expenditures for the month of May		
Income:		
Donations	50.00	
Sales	70.00	
Total:		120.00
Expenditures:		
Pencils	2.50	
Photocopies	12.00	
Telephone	18.60	
Total:		33.10
Balance remaining (deficit):		86.90

<p>You can do your own statement of income and expenditures based on the operations you recorded above.</p>
<p>Statement of income and expenditures for the month of _____</p>
<p>Income:</p> <ul style="list-style-type: none"> • • <p style="text-align: right;">Total:</p>
<p>Expenditures:</p> <ul style="list-style-type: none"> • • • <p style="text-align: right;">Total:</p>
<p>Balance remaining (deficit):</p>





b) Bank reconciliation

This operation shows you how much money remains in your bank account. To do this, you have to take into account any cheques that have been issued but not yet cashed.

Example:

Suppose that your bank account contained \$40.00 at the beginning of the period. The example below gives you the amount according to your books.



	Bank account
balance at the beginning of the period	40.00
plus: deposits	+ 120.00
minus: withdrawals	- 33.10
	126.90
= balance at the end of the period	



Suppose your bank statement is \$140.00 at the end of the period. Here is the reconciliation that takes into account cheques in circulation (issued but not cashed):

balance on the bank statement at the end of the period	140.00
minus: cheques in circulation	- 23.60
	116.40
= true balance of your bank account (the same as the balance in your books)	



c) Balance sheet

The balance sheet presents the financial situation as of a specific date. If we continue the examples

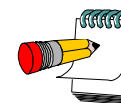
given above, and there are \$20.00 worth of bills to be paid, the balance sheet would be as follows:

Organization title Balance sheet to May 31, _____			
Assets		Liabilities and capital	
Bank account	96.40	Outstanding bills	20.00
Petty cash	20.00	Total liabilities	20.00
Cash balance	116.40	Total capital	96.40
Total assets	116.40	Total liabilities and capital	116.40



Using the exercises you have done so far, you can complete your own balance sheet:

Your organization Balance sheet to _____			
Assets		Liabilities and capital	
Bank account	_____	Outstanding bills	_____
Petty cash	_____	Total liabilities	_____
Cash balance	_____	Total capital	_____
Total assets	_____	Total liabilities and capital	_____





Debit and credit

The balance sheet involves two main categories of accounts: assets, liabilities and capital. Assets are always presented on the left-hand side of the column and liabilities on the right-hand side of the column.

Debit is recorded on the left-hand side of the column and **credit** on the right of the column.

Assets, on the left, normally have a debit balance. Liabilities and capital, on the right, normally have a credit balance.

Now, let's divide our left-hand column into two new columns:

the one on the left for debit and the one on the right for credit. The two columns can be used to record the increases and decreases in the value of each of our accounts.

Since the assets accounts have a debit balance, their sum increases by debiting them or, in other words, by writing them in the left-hand column. The liabilities and capital accounts have a credit balance, so they can be increased by crediting them. This can be done by recording them in the right-hand column.

This chart summarizes the situation:

Assets		Liabilities and capital	
(debit balance)		(credit balance)	
Debit (Increase)	Credit (Decrease)	Debit (Decrease)	Credit (Increase)
Total "Assets"		=	Total "Liabilities and capital"

For each transaction in the assets, liabilities and capital accounts, all records on the left (debit) should

always be equal to the total on the right (credit).



V. PROMOTION

Depending on the nature of your project, its success may depend on how you promote it and the support you are able to get.

In this section, the information is presented in two main sections:

- What is a promotion program?
- Using a variety of promotional tools.

What is a promotion program?

By planning promotional activities, you are more likely to get more visibility. Publicity is a planned exercise and cannot be done at the last minute.

Your promotion program can include several components in order to reach different consumers. For example, you can:

- use community television and pamphlets to reach the public;
- have announcements on the radio every week to gain the support of the community, to get the information out and to attract volunteers;

- publish a newsletter to maintain close contact with your participants;
- use a telephone chain to encourage members to participate in important activities; and
- use an advertising committee to organize regular activities in order to remain visible.

Unless you have an unlimited budget and available time, you will have to make choices regarding advertising. If you live in a small community where resources are limited, you will have to be creative in finding ways to advertise.

A promotional campaign attempts to reach people as individuals.

From the outset, you should ask yourself the following questions:

- To whom is our message addressed?
- What do we want to say to them?
- Why might our project interest and affect them?
- How can we communicate our feelings and interests to them?



Social marketing

Social marketing is a long-term approach. It aims to establish solid ties between your organization and its community.

It is about selling good ideas. These ideas must take into account the needs and interests of the people you are targeting. They must also take into account your objectives and community welfare.

Promoting ideas is about changing attitudes and practices. You need a clear understanding of the trends and concerns of your community.

Think about some of the following questions:

- Does your community place an importance on
 - social status?
 - prestige?
 - devoting time to volunteer work?
 - community organizations?
- How does your group or project fit in with your community's values?
- How does it make a positive contribution to your community?

- How can your group be presented as an extension of your community's values?

Using a variety of promotional tools

Promotional tools are essential for furthering a cause. Remember that it is better to produce one good document than two poor ones.

Do not wait until you need publicity to make contacts. Instead, you should try to keep people, especially journalists, regularly informed of your activities (nominations, celebrations, volunteer work, etc.) and achievements.

To be effective, each promotion activity should have a main theme. It should also use vocabulary that is familiar to your audience.

When addressing people outside your organization, ask yourself if the information presented would interest you if you were not already a member.



Here is a list of some promotional tools:

1. Printed material

- a) annual reports
- b) newsletters
- c) pamphlets and bulletins.

2. Tools for communicating with journalists

- a) press kits
- b) press releases
- c) press conferences.

3. Television

4. Radio

5. Audio-visual documents

6. Advertising

7. Sponsors

8. Lobby and pressure groups

9. Briefs

- a) preparing and writing a brief
- b) presenting a brief.

10. Public activities

- a) information meetings and lunch-time lectures
- b) panels
- c) public lectures
- d) information booths and display boxes
- e) promotional material.

Information on how you can use each of these means of promotion is presented below.

1. Printed material

Printed documents can be a very effective promotional tool because they communicate a lot of information to a large number of people.

You can use different kinds of printed documents as promotional material :

- posters
- flyers
- pamphlets and
- brochures, etc.

Even your annual report can be a promotional tool.

Before contacting anyone to print your documents, you should have a fairly good idea of:

- your publication's goals
- the budget you want to allocate to it
- the people you wish to reach and
- the number of copies you need.

Photocopying gives acceptable results and is inexpensive when you need to reproduce only a few copies.



Black and white photographs add extra appeal to your documents, but having them printed may increase the overall cost. Colour photographs will increase the price even more, even if you have them photocopied.

There are a variety of ways to prepare your originals (what you want to copy). Some people can produce originals themselves, but often such work is given to a graphics firm or printer. It all depends on your situation; you are in the best position to judge your options and make a decision.

It is very important to know what you want. You have to choose suppliers you will be comfortable working with so you can communicate your needs and wishes.

Here are some things that should be decided before your work can be printed:

- number of pages
- format
- number and position of photos
- number of colours and
- type of paper.

If your printer has not been chosen during the preparation stage, you can ask for at least two quotes, including cost as well as time frame, from printers.

Now we will take a closer look at these promotional tools:

- annual reports
- newsletters and
- pamphlets and bulletins.

a) Annual reports

Your annual report may simply be an account of your yearly activities that your president will read at an assembly. It may also be published and distributed to publicize your activities and make your group known. It does not necessarily need to be lavishly presented. It just needs to be well laid out, informative and easy to read.

To get ideas, consult reports from similar organizations. When you have a good idea of which themes you want to present, you can start writing. You may want to add illustrations, charts, etc.

You can distribute your report to your members and to politicians and journalists. You may want to



include press kits. You can also make it available to the members of your community.

b) Newsletters

Simple and short newsletters aim to communicate essential and reliable information. They usually target people who are already aware of your work and therefore do not necessarily require an elaborate presentation. Newsletters are often an inexpensive way to contact people who may otherwise be difficult to reach.

To decide what your newsletter should contain, consider your budget, the time you have to devote to it and your objectives. Your newsletter should have objectives. These may include:

- announcing upcoming events;
- teaching and informing;
- communicating information that is important either to your organization or to those who will receive your newsletter;
- publicizing your decisions and future goals, products and services, and accomplishments;

- promoting your cause and ideas;
- maintaining contact with people;
- acting as a promotional tool among people who are not direct participants in the project;
- informing people of how events and projects are going;
- soliciting volunteer resources and attracting funding; and
- motivating your members and participants.

Your newsletter should target specific groups of people, such as:

- your members;
- potential recruits;
- your supporters;
- members of groups with similar concerns;
- government officials;
- media representatives; and
- political and industrial leaders.

You can also add journalists, book stores, libraries, schools and others to your mailing list.

Now, we will see how to produce, write and present a newsletter.



1. Producing a newsletter

You can select a few collaborators for occasional consultation. They could give you ideas, feedback and information on what people think and expect of your newsletter.

If you wish to include advertising, be careful not to crowd the pages and to maintain the newsletter's independence.

You can make up a list of contacts which can provide you with information on subjects that interest you. Then, you can consult your various contacts before finalizing each edition.

You can also subscribe to magazines, newspapers and newsletters from other groups, etc. They might give you ideas and provide you with articles which may be relevant to your mandate. If you are well informed, you can get some good ideas for presenting your newsletter.

2. Writing and presenting a newsletter

If you wish to publish material sent by your readers, you may have to remind them from time to time to write to you.

Do not be afraid to write in a direct and personal style. It is best to use action verbs and shorter sentences. Try to be specific. Your readers will prefer knowing there were 60 people at an assembly rather than reading that there were "a lot of people".

Your first paragraph should introduce your article's most important or interesting elements. In this way, the reader knows right away what the article is about and can decide whether or not to read it or go on to the next one.

Readers look first at the top left-hand corner of the page. This is the best place to put the most important titles.

Pages should not be over-crowded. You might want to think about framing some items to make them more appealing.

If you have a choice, serif characters are best for the text. The character used here is an example of serif letters. They tend to be easier to read.

Serif characters are best for the text.
--



For titles, however, sanserif characters are better. Here is an example:

Character for a title

You can draw up a model and list of things to check for each edition. This will give a sense of stability and continuity to your newsletter. If you prepare a basic presentation model that goes well with the content of the newsletter, you can use it for each issue.

Someone else should proofread the final version before it goes off to the printer or photocopier.

c) Pamphlets and bulletins

These are documents that present your group or project, and can be widely distributed. They contain concise information about who you are, what you do, who your clients are and why you offer the service.

2. Tools for communicating with journalists

Journalists can be good collaborators in your efforts to promote your project. However, you have to supply them with appropriate tools for

producing their reports or writing their articles.

Three of these tools are described below:

- a) press kits;
- b) press releases; and
- c) press conferences.

a) Press kits

Your press kit could include a letter of introduction, information on your program and projects, a description of your results from the past year, your priorities for the current year, press releases, photos, etc.

You can have this kind of kit ready, but usually it is prepared for a special occasion. You can include all documents that will be presented and discussed during the special activity.

b) Press releases

A press release is a short document that provides journalists with information of public interest that they can broadcast. Journalists usually receive press releases on a daily basis, so it is important that yours catches their attention.



There are several tips for making press releases easier to use. They should:

- have wide margins (This is so journalists can take notes or make changes.);
- be printed on a letterhead (Otherwise, clearly indicate your group's name, address and telephone number at the top or bottom of each page.);
- be limited to two typed double-spaced pages (One page is preferable.);
- have the date with "immediate release" written on it (If the news can be announced immediately.);
- contain the word "Source" at the bottom of each page, with the name and phone number of the person to contact for further information (This could also be used to give your organization's address and telephone number.); and
- mention "end" at the very end of your release in the centre of the page.

The first paragraph should present the main points. The most

important point should be mentioned in the first sentence.

The first two sentences should answer five questions: "who", "what", "when", "where" and "why".

The paragraphs should be in descending order of importance. If people want to broadcast or publish your release, but do not have space for all of it, they will shorten it from the bottom upwards.

It is best to use simple words in relatively short, active sentences. The style should be positive but objective. Mention specifics such as "Saturday, May 10" rather than "next Saturday". In other words, try to use a similar style to what journalists themselves would use.

Use plain language. If your text contains words that are difficult to pronounce, it might be a good idea to include pronunciation notes. This is especially important for the names of people or places. If your information is related to current affairs, you may be able to get interviews and articles. This is most likely in local and community media.



You must be sure the data in your release are accurate. Journalists are responsible for the information they use.

c) Press conferences

You might want to hold a press conference if the information in your press release is too lengthy and the subject is of great interest.

It is best to send a written invitation, by mail or courier service. Outline the main reason for the conference and provide a few facts to raise curiosity. You can use the telephone to follow up on the invitations.

This is a good opportunity for distributing your press kits. If possible, include a copy of the speeches that will be made.

Journalists are often very busy. Therefore, you should avoid stretching out the press conference beyond what is strictly necessary.

A conference should take into account media deadlines. Try not to hold the conference at the same time as other events.

Before the conference, it is a good idea to check if everything is working properly: microphones, plugs, lighting, etc.

Do your speakers have all the necessary information? Do the participants have a good grasp of their roles?

After the conference, you may want to deliver your press kit to journalists who were unable to attend.

3. Television

The various television stations, even commercial ones, sometimes broadcast public service announcements. You can send them short texts (in the style of a press release) for broadcasting.

Television is an expensive medium. If your subject is visually appealing, you may be able to convince a producer to do a report on your organization. Otherwise, you are better to focus on written media or the radio, unless you have a community television station.



Community television stations may allow you to broadcast television shows, documentaries, interviews and short messages. Messages are often broadcast simply by scrolling words across the screen. You may be able to get help and resources for producing your own episode. It is often difficult to do a quality live report on an activity. However, because of its special interest, people are much more tolerant of its imperfections!

4. Radio

In addition to interviews and shows that are produced at the radio station, you may be able to broadcast short messages on the radio. If there are shows that deal with subjects connected to yours, you should be able to get some air time.

If you have access to a community radio station, you may be able to use it for:

- broadcasting shows;
- broadcasting news bulletins;
- doing interviews;
- organizing panel discussions;
- organizing open-line shows; and
- broadcasting excerpts from conferences, meetings, etc.

People listen to the radio in their car, at work or at home. It is a popular medium that is very flexible. It can reach people in all sorts of situations.

5. Audio-visual tools

Slide shows and videos are two kinds of affordable audio-visual tools. The medium should be chosen to fit the message you want to get across.

Inexpensive but professional-looking results can be obtained by putting together your own slide shows. These can contain a lot of information to be used in public contexts.

Choose your means in accordance with how you want it to be circulated. For instance, it might be more appropriate to produce a video cassette. They can be easily distributed and used either individually or in small groups.

6. Advertisements

A paid advertisement may be the best way to ensure that your message is broadcast in the way you want it to be. Newspapers and radio stations are a fairly inexpensive form of media.



Choose your advertisement according to your budget and based on the group you wish to reach. For example, to advertise a series of workshops, details can be advertised in a newspaper and a few announcements can be broadcast over the radio on the day of each activity.

7. Sponsors

Sponsors are individuals or businesses who will help pay part or all of the costs of advertisements for your project in newspapers, over the radio or on TV. In exchange, they will ask that you mention their names in the advertisements. Some businesses prefer this kind of publicity, since they often do not have anything to sell directly to the people who live near their offices or factories.

Sponsors may also be willing to pay for other things you need. They can provide equipment, installations, food supplies and gift certificates. These articles may be used directly for running your organization or they can be offered as door prizes, rewards, thank-you gifts for your volunteers, etc.

You may be able to act as a sponsor yourself. You could sponsor activities that reach the same clientele as yours or that are in keeping with your objectives. This can be an inexpensive way of advertising that is highly specific and often more effective than an overly general one.

8. Lobby and pressure groups

Lobbying is promoting and publicizing your cause. Its aim is to influence the opinions and actions of people who are influential and powerful in a given area. The word “lobby” is often used to refer to attempts to influence public powers. Lobbies and pressure groups also aim to sway public opinion in their favour.

Lobbying involves identifying the influential or powerful people in the cause that interests you.

Once you have determined who the contacts are, you have to decide how you are going to influence them or gain their support. You can also think about approaching the people close to the person you wish to reach.



You can reach these people by directly contacting them yourself. You can appoint a spokesperson or an official representative who can clearly present your cause. Your representative should know your organization well and have a good understanding of your project and your demands.

There may be people in your surroundings and among your supporters who have influence over the decision makers you wish to reach. There also may be organized groups that can be of help.

The people you contact are interested in information and arguments for making decisions. If your information is reliable, they will use it. So, it is in your best interest to be well informed. In addition, you will be able to take action as soon as issues arise. This is often easier and more effective than reacting after the fact.

You should study the issue carefully. This will help you see where your strengths and weaknesses lie. Then, you can determine how you want to present your arguments and defend your cause. It is preferable to do so

before going public or starting to lobby. In fact, you should be prepared to present not only the issue that concerns you, but also the solution you would propose.

You can consult resource people and ask your members to provide information and arguments. You can make alliances with other groups.

Be clear and specific in your speeches and presentations. Your arguments may seem obvious to you, but that is not necessarily the case for others. Take the time to explain yourself well.

If you do not know the answer to a question or are unsure of it, say so, and arrange to get the information as soon as possible. This will project a professional image.

Try to find some supporters! They could write letters or sign petitions.

Take notes on people interested in your cause, people you have contacted or met with, meetings, events, etc. Such information could be useful in answering questions and explaining your goals and approach.



You can also use various promotional tools (telephone, letters, flyers, pamphlets, posters, reports, TV, radio, etc.). The aim is to rally interest in your cause and help move it ahead.

9. Briefs

A brief is a written document that informs and supports your position on an issue. Briefs are often solicited by commissions organizing public consultations.

In this section we will focus on:

- preparing and writing a brief; and
- presenting a brief.

a) Preparing and writing a brief

A brief can be a way to present your opinions and give them greater visibility. A brief either deals with a problem you would like to see resolved or takes advantage of an opportunity you would like to see developed.

As with any promotional activity, a brief should be articulated around a central theme. It should have a well defined subject.

The people who read your brief can be viewed as your clients. So treat them as you would any client you wish to reach through promotion. Two particularly relevant aspects include:

- Are there any specific requirements for presenting a brief?
- Have they already received briefs that present the same viewpoint as yours? If so, what were the results? Can you obtain copies of these briefs?

The next stage consists of gathering relevant information. Possible sources of information vary according to the subject of your brief. It is worth taking the time to make a list of these information sources.

Examples might include:

- notes you have taken yourself;
- information from members of your community;
- newspaper articles;
- libraries;
- professional associations; and
- governments ministries and departments.



You do not necessarily need to find a lot of information. Instead, search for high quality, relevant information. Some information might be interesting, but not sufficiently relevant for you to include in your brief. Keep it close at hand in case you need details when making your presentation.

Here are the main divisions for briefs:

- title page;
- summary;
- table of contents;
- introduction;
- body of the text; and
- conclusion.

The title page should include:

- the title or subject of the brief;
- the name of the person or organization presenting it;
- the date; and
- the name of the person or organization to whom it is destined.

The summary, which is usually just one page, highlights the main points. If you are making only a few recommendations, put them with the summary. Otherwise, you

should also add a page that summarizes your recommendations. People usually start reading a brief here. If you do not include a summary, someone may be asked to do one for you.

A table of contents should be included if the document has chapters or is quite long.

The introduction contains information on:

- your organization;
- your objectives;
- the subject of your brief;
- your reasons for taking an interest in the subject; and
- the various issues you will deal with.

The body of the text includes a description of the situation, a discussion of the obstacles it implies and a presentation of realistic options. It is best to present the information concisely.

b) Presenting a brief

It is best to print or type the documents in double space to make it easier to read. They should also be bound in some way.



You may have to hand in several copies of your brief. You should also check the date it should be sent, and the name and address of the person to whom you are sending it. If an oral presentation is planned, you will be advised of the time and place.

You need to choose someone who will be comfortable presenting your brief. It could also be presented by several people. However, there should be one clearly identified person in charge of it. Questions should be addressed to that person. If you are not familiar with this type of presentation, you can observe others as they present their brief.

During the presentation, do not simply read your brief. The people holding the hearing will have at least read the summary. The presentation can be fairly short, leaving ample time for questions. You may even decide to support your presentation by using audio-visual material.

If there are media representatives, you can give them a copy of your brief. You can also use your summary as a press release. Both your press release and your brief can be sent to a variety of media.

10. Public activities

When planning a public activity, there are several points to keep in mind:

- It should receive adequate publicity.
- It should be well organized.
- It should not be longer than necessary.

We will look at:

- information meetings and lunch-time lectures;
- panels;
- public lectures and presentations;
- information booths and display cases; and
- promotional material.

a) Information meetings and lunch-time lectures

The aim of an information meeting is to inform the participants. The information may be about your group or project. It could, for example, deal with preventing dental health problems.

It is important to make people feel welcome at such meetings. Take care in choosing the atmosphere,



arranging the room and planning the agenda. It is also a good idea to check that the equipment is working properly before the meeting.

The stages are usually as follows:

- greeting;
- introducing the speaker;
- lecture;
- question period;
- thanks; and
- informal activity.

If it is a lunch-time lecture, everything should take place while people are at their tables, except for the first and last stages. This affects the way you set up the room, serve the food, etc. It is also a good idea to give people some time to chat before the lecture. For all these reasons, the lecture often is given toward the end of the meal.

An informal activity used to close the meeting gives people a chance to exchange. It can give people an opportunity to get to know each other better, consult documents, ask very specific questions, etc.

To make the lecture more appealing, you can use charts, videos, slide shows, etc.

b) Panels

A panel involves sitting a few people down and having them discuss a subject in order to better inform the public. It takes place with a moderator who helps maintain an even tone.

This kind of discussion is held in front of an audience, in a room, on radio or on TV.

A panel can be used when you want to present a variety of opinions. It allows the public to form its own opinion on a controversial subject. It can also attract attention to an important but little known subject.

It often allows for some form of audience participation. This can take the form of a question period. On radio and TV, the audience can be represented by a small group of people in the studio. People can call in their questions to the panel.

c) Public lectures and presentations

If you are going to speak in public, you have to prepare your lecture well, especially if you feel you need more confidence.



You can simply and logically divide your speech into three parts: introduction, development and conclusion.

In the introduction, present the topic of your lecture as well as the specific points you plan to discuss. You might also want to mention why this subject is important for your listeners.

In the development, your ideas should flow naturally. Use a style and vocabulary that suits your audience. If you think the public probably won't agree with you, you may want to present the various viewpoints of the situation. If the subject is of a sensitive nature and may affect people personally, try to be cautious of people's feelings.

In the conclusion, summarize your lecture. You could simply go over your main idea or tell a short story that illustrates the most important points in your lecture.

Once you have finished preparing your text, put it aside for a while, and then reread it. Do you still think it is well adapted to your listeners? If so, read it over and over so you almost know it by heart.

Breathe deeply, and give your lecture as if you were having a conversation. But be careful to speak clearly, loudly enough and slower than usual. Use a tone that accentuates your topic, but let your personality show through. That is what will give life to your speech!

It will help you relax if you move around and make gestures from time to time. Look at your audience, both at the back and front of the room.

d) Information booths and display cases

You may want to build a portable booth to use in shows, stores or even at the exit of workplaces and offices.

If your booth is going to be moved often, it will have to be solid and protected. It also should not be too difficult to set up and take down.

Make it attractive, using photos and drawings. It is not useful to include too much text, because most people will not take the time to read it anyway.



Display cases can be more practical because you can place them in a variety of places. Most of the time they are placed on tables, but bigger models can be made to be placed directly on the ground.

e) Promotional material

Stickers, pens, calendars, coasters, buttons, pins, bookmarks, caps, etc. all can be popular and make your message or name visible for a long time!



APPENDIX

REQUEST FORM FOR THE UPCOMING YEAR'S BUDGET

Program/Activity: _____

Name of person responsible: _____

Date: _____

1. What needs to be done this year?

2. How much money do you expect to need to carry out these activities?

3. How much was set aside in last year's budget for this?



4. How much was actually spent?

5. What sources of income do you foresee in your activity sector?

a) Source: _____

b) Expected amount: _____

6. Other comments:
