AROUND FOR A WHILE

MORE TOOLS FOR SUSTAINING YOUTH-LED PROJECTS AND PROGRAMS

November 2005

ABOUT THE YOUTH LEADERSHIP INSTITUTE

The **Youth Leadership Institute** (YLI) builds communities where young people and their adult allies come together to create positive social change. It designs and implements community-based programs that provide youth with leadership skills in the areas of community health promotion, philanthropy, and policy and civic engagement. Building on these real-world program experiences, YLI creates research-based curricula and training programs to engage in social change efforts across the nation, while promoting best practices in the field of youth development. The organization was founded in 1991 and supports 30 employees.

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ABOUT THIS TOOLKIT

In 2004, with a grant from the W. Clement and Jessie V. Stone Foundation, The Youth Leadership Institute produced a toolkit we titled: *Staying Power: Sustaining Youth-led Projects for the Long Haul*. The purpose of that document was to give adults who support youth-led programs a set of basic tools to help youth sustain their work over time. This toolkit continues our organization's commitment to help youth-led groups sustain their work.

Staying Power had a general approach and covered six different areas of relevance. In this new toolkit, we deliberately choose to focus on three areas that are particularly important to long-term success: fundraising; leadership transitions, and evaluation. We based our decision to select these three subjects on the feedback and suggestions from youth and adults involved in the review and testing of the previous toolkit, along with our many years of experience working with youth-led groups.

This toolkit is designed to be used! Each topical area (fundraising; leadership transitions, and evaluation) has its own CHAPTER. Within each CHAPTER, there are two or more sections. Each section overview describes its specific purpose and its contents. The reader will see that within each section, there is a range of different components that both facilitators and youth leaders can use.

✏ Each Chapter starts with a **CHAPTER OVERVIEW**, where readers learn about the major purpose of that chapter.

✏ Within each chapter, there are one or more **READINGS**, **PARTICIPANT HANDOUTS**, **PARTICIPANT TOOLS**, **ACTIVITIES**, or **RESOURCES.**

- ✔ **READINGS** are longer pieces (a page or more) that provide background content for the young leaders or adult allies. Readings they are specifically labeled "Participant" or Adult Ally," designating that some are for adult allies, other for youth. All readings are also very helpful and appropriate for facilitators who are charged with leading activities we've developed for the toolkit.
- ✔ **PARTICIPANT HANDOUTS** are brief pieces that youth leaders and adult allies can use as reference when they are carrying out specific work in that area.
- ✔ **PARTICIPANT TOOLS** are materials that youth leaders or adult allies can actually fill out to create their own plans, decisions, or actions related to the three content areas.
- ✔ **ACTIVITIES** are structured sessions designed to be led by a youth, adult or young adult facilitator.
- ✔ **RESOURCES** cover websites, organizations, books, etc. where participants and allies can get additional information about topics covered or touched on in this toolkit.

<u>A note about the words PARTICIPANT and FACILITATOR</u>: In the context of this toolkit, participant refers to the young leaders (volunteers or staff) who lead up the work. Facilitator refers to the person leading that activity. This could be an adult ally, or a young person.

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RAISING FUNDS: WHAT YOUTH-LED GROUPS SHOULD KNOW

OVERVIEW OF THIS CHAPTER

Is fundraising important for sustaining youth led projects and programs? The answer is obvious. Of all the areas that youth-led groups have sought assistance from YLI, "Raising more money for their projects" is always the top request. Money keeps the stipends coming, programs operating, and participants fed. But fundraising is powerful for other reasons. For those responsible for seeking funds, it builds important skills, increases their ownership, strengthens their connections to community stakeholders, and gives them a sense of power and control.

This is an area that many young people will have some familiarity. Many have already received grants from youth grantmaking groups to start up their programs; others have done some fundraising for their schools, sports teams, or congregations. Consequently, the tools, materials, and activities in this chapter are oriented towards aspects of fund development that young people have less familiarity with, and which have the potential to generate significant funds over time.

In this chapter, we start with some background information and theory, and use an activity format along with readings and handouts to reinforce the learnings. Next, this chapter turns to individual donor fundraising. The facilitator-led activities, handouts and participant tools are designed to help youth group members develop their confidence, skills and plans for seeking funds from their personal networks. In the grantseeking section, facilitators can access activities and tools to help participants prepare for writing grants and meeting foundation funders. The final section of this chapter offers a reading and tool that participants can use to create their own action plan for raising funds—one that incorporates the lessons from earlier sections.

INTRODUCTORY CONCEPTS: FUNDRAISING AND YOUNG PEOPLE

THE GOAL OF THIS SECTION is to provide context for fundraising approaches. Because most adults and youth have found this toolkit after their successful experience getting a grant from a youth-to-youth grantmaking program, the opening section helps new fundraisers understand the importance of not only considering grantwriting when thinking about next steps for raising funds. In particular, it encourages participants and their allies to also look closely at raising funds from individuals to sustain their youth-led project or organization.

ACTIVITY: FUNDRAISING BASICS

Purpose: To introduce basic fundraising concepts and confront myths about young people as fundraisers.

Method: presentation by trainer

Time: 15 minutes

Materials: Flip chart and markers

1. **Start by providing definitions of Grant and Foundation if participants are not familiar with these terms**

   ✏ See page 96 for definitions of these and other important terms

2. **Review the different ways to raise money. Use this list below on a flip chart as a guide.**

   ✏ Writing grants to foundations, governments or other organizations

   ✏ Asking for money from corporations or individuals

   ✏ Holding events like house parties, banquets, and dances

   ✏ Selling goods or services (T-shirts, stickers, car washes, bake sales)

3. **Ask for a show of hands about participants' experience in any of these methods.**

Note that most youth have had experience with the last, but less experience with the first three—is this the case with this group?

4. **Explain the advantages and disadvantages of raising money through individuals or seeking grants from foundations or the government**

   ✏ Here is a suggested script you can use: *It seems like it's a lot easier to write a grant and get a lot of cash all at once then asking lots of people for a little amount of money, right? But there's a catch. By focusing all your money raising efforts on one foundation, you loose opportunities to connect lots of people in the community, even if they aren't giving you money. With a grant, there are lots of "strings attached" to the money. You usually have to do something really specific, as opposed to when you get small donations, where that money is a lot more flexible.*

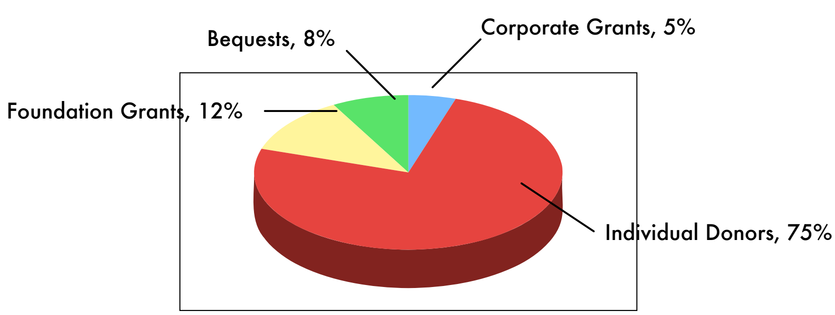
   ✏ Use a chart like one below to help illustrate the advantages and disadvantages.

RAISING MONEY FROM INDIVIDUALS	RAISING MONEY FROM FOUNDATIONS
Advantage: you meet lots of people and get a chance to talk to them about your group	Advantage: Get a lot of money at once
Advantage: there are few "strings attached"	Advantage: Writing the proposal forces you to clarify your program or project idea clearly in writing
Advantage: frequent verbal requests help you sharpen your "pitch"	Disadvantage: foundations are not likely to keep giving you money year after year
Advantage: Once people make a donation, they are likely to keep giving year after year.	Disadvantage: writing a grant is very time consuming
Advantage: donors usually don't require lengthy reports, only acknowledgment and a sincere thanks,	Disadvantage: foundations often require lengthy reports
Advantage: Verbally asking for money from an individual is not very time-consuming.	
Disadvantage: each donor generally gives only a small amount–you need to hit up a lot of folks	

3. Review how overall giving in the US is divided:

✏ Replicate the chart below to illustrate. [Note that this pie chart doesn't include government grants.] Ask if anyone is surprised about how giving is distributed. Conclude by saying that while getting grants from foundations is great, it's important to realize that most money comes from individuals, so we can't forget about this important source when we try to raise funds for our project.

✏



Source: Giving USA Foundation–AAFRC Trust for Philanthropy/Giving USA 2005

4. **Review TRUTHS AND LIES about asking individuals for money.** Ask members whether they think the following statements are true or false.

- ✏ Poor people give a greater percentage of their income to social causes than rich people do. *[True. While rich people might give a greater absolute figure, low-income people tend to give a greater percentage of the income they earn.[1]]*
- ✏ Professionals are the best fundraisers. *[False. Professionals can be great fundraisers, but the most effective are volunteers who are passionate about their cause.[2]]*
- ✏ Young people don't give money to good causes. *[False. a late 90's study of youth giving found that 41% of youth made contributions to good causes, and that the AVERAGE yearly contribution of these young donors was almost $90.[3]]*
- ✏ Once donors give once, they never give again. *[False. If people have given to you once, don't hesitate to ask them again the next year! They are even more likely to give than if you had never gotten $$ from them.]*
- ✏ Asking for money is begging. *[False. Begging could be described as getting something for nothing. When you raise money for your project, you are also giving back in the form of the impact that your project has for individuals and the community.][4]*

5. **Conclude the presentation by asking the participants the following questions:**

- ✏ What did people learn from this presentation?
- ✏ How did their understanding about fundraising change?
- ✏ What was surprising to you?

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[1] Independent Sector. *Giving and Volunteering in the United States.* 2001.
[2] Andy Robinson. In Praise of Amateurs: Why Volunteers Make the Best Fundraisers. *Grassroots Fundraising Journal*. November/December 2004. pages 12-14.
[3] Independent Sector. *Volunteering and Giving among American Teens.* 1996
[4] Kim Klein. The Ten Most Important Things You Can Know about Fundraising. *Grassroots Fundraising Journal*. January/February 2004. pages 11-14.

PARTICIPANT HANDOUT: WHY SHOULD YOUNG PEOPLE BE FUNDRAISERS?

- ✏ Because they must to start-up and sustain their own ideas
- ✏ Because it fosters ownership and deepens their investment in their projects and organizations
- ✏ With money comes power
- ✏ Because fundraising offers rich skill development opportunities
- ✏ Because it deepens understanding of reality of community work
- ✏ Because it helps youth establishes long term relationships with important actors in their community
- ✏ Because it deepens their understanding of their own project—communicating what they want to do verbally or in writing is a powerful intellectual exercise
- ✏ Because young people have important contacts and networks that are typically untapped sources of funding
- ✏ Because young people can offer energy, excitement and creativity to fund development—essential ingredients for success
- ✏ Because it's compelling for donors to see youth as leaders or partners in fundraising—it strengthens the pitch

HOW TO ASK FOR MONEY FROM INDIVIDUALS

THE GOAL OF THIS SECTION is to help prepare participants to ask individuals and businesses for individual donations. Central to this section is the work that participants do to create talking points and practice their fundraising pitch.

Activity: Fundraising—Can We Really Do This?

Purpose: To convince participants that soliciting individuals for funds is within their reach and will produce good results.

Method: presentation, discussion, and brainstorming

Time: 30 minutes

Materials: Flip chart and markers

1. Pose some initial questions to participants

Participants might not think that they can raise a lot of money. Use these questions below to show the group how...

- Who here can think of one person that might give $10 for what we are doing if we really made a strong case?
- How about $50?
- $100?
- $500?

Keep track of numbers of people raising hands and calculate how much the group would raise at $10, $50 and at $100 levels. Use the total to demonstrate to them how their collective efforts add up to a lot of money.

2. Review positive things about asking lots of people for money.

Use the following statements, or add your own, to show how asking for funds, even if a donation is NOT received, is a worthwhile activity.

- Even if the person you ask doesn't give, they learn more about what you do
- You get a chance to educate people in your community about what you are trying to do
- You get a chance to build a relationship with people who otherwise might not know about you or trust you or your group. This becomes helpful if you are trying to mobilize folks around a community issue, get people to go to a rally or show up at a meeting.
- Conclude by asking participants if there are other good reasons to add.

3. Review reasons people might be afraid of asking for money

If you are like the many people, asking for money doesn't come naturally. It can be uncomfortable and embarrassing. Using flip chart paper, brainstorm what people's fears or anxieties are in relation to asking for money, and address them one by one. Below are some obvious fears, and ways to respond.

- They don't know anyone who they think would give (there are more than they think)
- They don't want to sound like they are begging (begging is getting something for nothing—very different from the important work that their donation will fund)
- They are uncomfortable with "adult" language (practice and experience help with this)
- They are afraid of being rejected (Refocus on the number of people you ask, not how much money you get). Reminder: people are wary about "solicitors." But you are different. You are a volunteer and part of the group that you are asking money for (which makes you be taken a lot more seriously). Potential donors are going to have a much different reaction to you than a paid telemarketer who calls your house at dinnertime to ask you to contribute to some random charity that you may or may not have heard of.

ACTIVITY: WHAT SHOULD WE SAY?

Purpose: To help participants create and initial "script" and practice the "pitch" to a donor.

Method: role-play and discussion

Time: 45 minutes

Materials: Flip chart and markers for the facilitator; paper and pens for participants; and the tool and handout on the following pages

1. Explain to participants that they will be writing down on paper an outline of what they could say to encourage people to give them money. You may also want to explain the following terms:

- ✏ Another term for this outline is a "script" or "talking points". You use this script to make a "pitch" to a potential donor.
- ✏ A "pitch" is the actual face-to-face request a person makes to a potential donor.

2. Pass around a handout like that on page 21 and state that as individuals, they will be using the questions on the handout to help them prepare their script.

- ✏ NOTE: Your group needs to be able to first define its group's mission, goals, activities and accomplishments. This is critical, because fundraisers need to be confident about what they do and be prepared to answer lots of kinds of questions. If the group as a whole is unclear about these key areas, however, you may need to help them take a step back and spell them out. Page 21 provides an example of these elements.

3. Suggest some introductory and closing statements

- ✏ Explain that these statements are the most important, so make sure they are included. Below are suggestions for wording—encourage participants to use their own words when creating their intros and closings.

  <u>INTRO</u>: Ms. B—I'm with [x group] and we're trying to raise money for our work. Got a few minutes for me to tell you what we are doing?

  <u>CLOSING</u>: Can you give us $20 to help us with this project?

4. Have participants get into pairs, but work alone to come up with their pitch

- Give participants up to 10 minutes to answer these questions and prepare their pitch. After people have completed the writing portion, have them practice their pitch with their partner. Conclude by seeking one or more volunteers to present their pitch in front of the group.

5. Conclude the activity with questions about their experience with the role-play.

Consider the following questions:

- Did this change your perception of how hard it was to ask for money?
- Do people feel more comfortable now?
- What are the areas or your "pitch" that need the most work?
- Are their things that you think need to be added to your pitch to make it more effective?
- What else do we need to know to ask for money?

PARTICIPANT HANDOUT: SAMPLE FUNDRAISING PITCH

Joe: Hey Mr. Williams, it's Joe from down the street. I am a volunteer with _____ and we are trying to raise cash to keep an important program going. Do you have a few minutes for me to tell you what we are doing?

Mr. Williams: Make it quick—I've got dinner in the oven!

Joe: Thanks. I've been working with some youth at the boys and girls club to set up a tutoring program for younger youth. We've managed to raise $2000 for this program already, and need ___ more. This program is important to me because I really could have used a mentor when I was younger and I know it could be really helpful. There are lots of youth around who need some direction and guidance, don't you think?

Mr. Williams: You are right about that!

Joe: Here's some history about us. We are located in the boys and girls club, and we get help from adult staff there. Our group is totally youth-led though, and we've been around since 2003. We work on this project at least twice a week. There 6 of us leaders, 10 older youth who are mentors, and we finding ten youth to be mentored. We already have commitments from parents of 6 of these youth.

I've been asking people I know in this neighborhood to give $20 to help us run this program. We need the money to help pay for supplies, snacks, and a bus rental for a mentor-mentee outing. Can you help us out with $20?

Mr. Williams: Well, is it tax-deductible?

Joe: Yes it is. You make the check out the boys and girls club, and I will give you a receipt for your tax records.

Mr. Williams: Ok. Here's $15 bucks—its all I can do right now.

Joe: Thanks so much, Mr. Williams. We'll keep you posted on how things are going with the project.

PARTICIPANT TOOL: FUNDRAISING PITCH WORKSHEET

WHAT YOU WILL SAY IN YOUR OPENING STATEMENT:

YOUR GROUP'S GOALS:

THE REASONS YOUR GROUP GOT TOGETHER:

ACTIVITIES OR ACTIONS YOU ARE DOING WITH YOUR GROUP AT THIS TIME

WHAT YOU HAVE ACCOMPLISHED SINCE YOU STARTED

YOUR STORY (what this work means to you, how it has helped you, etc.)

YOUR CLOSING STATEMENT (when you ask for the amount of money)

PARTICIPANT READING: GETTING CLEAR ON YOUR PURPOSE

To be able to make your fundrasing pitch, your group needs to first be able to define its mission, goals, activities and accomplishments. This is critical, because fundraisers need to be confident about what they do and be prepared to answer lots of kinds of questions. IF YOU HAVEN'T DONE THIS IN YOUR GROUP, OR PEOPLE ARE GIVING DIFFERENT ANSWERS, ITS TIME TO GET IT CLEAR. HERE'S AN EXAMPLE!

Your group's mission:

Our mission is to help beautify our community using graffiti art murals

Your group's goals:

Educate community residents about the positive qualities of graffiti art

Beautify the community

Give youth graffiti artists a positive outlet for using and developing their artistic skills

The reasons your group got together

We saw a lot of youth interested in graffiti as an art form. We also saw that adults had a bad impression about graffiti. We understand that lots of youth tag, but know that if they had a positive way to do graffiti, they'd be more interested in this than in tagging.

What activities or actions you group is doing at this time

There are ten of us working with a neighborhood storeowner to create a graffiti art mural on the outside of her building

What you have accomplished since you started

We've done 3 murals and put on a few workshops that educated youth about the history and techniques of graffiti art.

Activity: Whom Do We Ask?

Purpose: To help participants generate a list of possible individual donors

Method: brainstorming

Time: 15 minutes

Materials: Flip chart & markers for facilitator; copies of tools from the next page

1. Start the activity with a statement about how its time to start thinking about who its time to start thinking about who you want to reach.

Review categories of people your participants might be thinking about already. Here is a suggested list to use.

- ✏ Your parents or guardians
- ✏ Your relatives
- ✏ Your parents' or guardians friends
- ✏ Your teachers
- ✏ The parents or guardians of your friends
- ✏ Your neighbors

2. Next, turn to less obvious categories.

Start by asking "who else" and writing their suggestions on flip chart paper. Add the list below if participants don't suggest them on their own. Deliberately discourage them at this junction from thinking about these possibilities according to how much money participants think these people might have.

- ✏ People who own or work at businesses that you and your family frequent (restaurants, hair salons, the local convenience store, etc)
- ✏ Your priest, minister, imam or rabbi
- ✏ Members of your congregation of your church, mosque, or synagogue.
- ✏ Members of service organizations (Kiwanis, Lions Club, etc) that your parent, guardian, relative or close family friend is also a member of.
- ✏ Work colleagues of your parents
- ✏ Your current or former employer
- ✏ Your teachers
- ✏ Your friends and classmates

3. Next, have participants brainstorm actual individuals they could approach.

Encourage them to consider people according to the categories just developed. Use the worksheet on the next page to do this.

Give participants up to 10 minutes to build out their potential list.

PARTICIPANT TOOL: YOUR LIST OF POTENTIAL DONORS

NAME: ____

POTENTIAL DONOR	HOW YOU KNOW THEM
Example: David K.	Example: Close family friend who has know me since I was born.

ACTIVITY: FILLING IN THE GAPS

Purpose: To help participants prepare for questions, requests and other less obvious responses by potential donors

Method: visualizing, brainstorming and small group work

Time: 45 minutes

Materials: Flip chart and markers for the facilitator; paper and pens for participants

1. Ask participants to take 30 seconds to visualize making a pitch to someone they don't know well at all (like a parent of a friend).

What kinds of questions or comments do you think might get asked? Give participants sticky notes to write these questions down. After they have written them down, have them place these notes on flip chart paper.

2. Next, have the facilitator cluster the questions by theme and then see if people can think of additional ones that weren't already stated.

See the list below for important additional questions that participants should be sure to address.

- I can only give a small amount (less than you asked). Is that OK?
- How do you want the money (cash, check, etc.)?
- Can I get a receipt?
- Now's not a good time for me to donate. Can you ask me in a few months?
- I'll make a donation, but I don't have the money on me right now.
- Can I get more information about your group?
- Can I talk to the adult in charge?
- Can I see some proof that you are legitimate?
- How is the money actually going to be used?
- Will my contribution be tax-deductible?
- I can't help you but I know people who you might want to talk with.
- I can't give money but have some office supplies (or any other in-kind donation) that you night need.

3. Organize participants into teams to try to address each question or comment.

After teams have completed this step, have them present their answers to the large group. The facilitator should capture the statements, and ask other participants if there are things that need to be changed or added to complete the answer.

4. Finally, after all questions have been answered, develop a list of things that need to be done to make sure that all participants can respond well to these type of questions.

Some obvious products or things that might need to be prepared include:

- ✏ A Q&A sheet that fundraisers can refer to in order to help them be prepared for these types of questions
- ✏ A brochure, fact sheet, or packet that has information about the project and sponsoring organization
- ✏ A way to record commitments that people make (especially if the donors needs to pay at a later date)
- ✏ A special sheet to write down who, how and when to follow-up with people who want you to come back to them later for a donation

Activity: Personalizing the Pitch

Purpose: To help participants alter their pitch to fit the interests and perspectives of the potential donor

Method: small group discussions, individual writing, and a fishbowl

Time: 45 minutes

Materials: Flip chart and markers for the facilitator; paper and pens for participants, scripts that participants previously developed, signs for "speed dating" portion of the activity

1. Start by explain how important it is to take into consideration the person's needs, interests, desires, situation, etc., when you ask him or her for money.

Give your own examples or use some of the following situations and potential responses.

- You want to ask your friend for a donation, but you know he just lost his job. [Response: maybe wait until he's got a new one.]
- You want to ask your uncle for a donation, but you know he's always talking about how kids these days are so negative and selfish. [Response: highlight how what you are doing is so positive, and how many young people are involved in planning this positive project.]
- You want to ask your teacher for a donation, and you know how she's always talking about how kids need life skills to "make it" in this world. [Response: highlight the kinds of "life skills" that planners get in carrying out the project, and how your project is also helping to build skills of the youth we serve.]

2. Ask for volunteers to give their own examples of people who they might want to ask for donations and how they might customize their pitches to take into consideration any special factors or considerations.

3. Use a "speed-dating" technique to give participants opportunities to change his or her pitch to address the potential donor's specific interests or needs.

- Select 2 or more volunteers to be potential donors, and 2 or more volunteers to be fundraisers.
- Position donors along a line in the room 8-10 feet apart.
- Have these donors attach signs to their chests that describe characteristics that the donor needs to consider when making his or her pitch. Each sign should be different. Here are suggestions for signs for the prospective donors:

- ♣ I care about how this project is helping you, because I love you and want to see you succeed.
- ♣ I like to hear myself talk, so ask me questions, too!
- ♣ I want to see evidence that my money is going to be put to good use.
- ♣ I am really passionate about the issue you are trying to address through your project.
- ♣ You and I are good friends. However, I generally only give to animal-related charities, like the Humane Society, but know a few people that might like to support your specific project idea.

- ✏ Have three fundraisers line up in front of the three donors. Tell the fundraisers they have exactly 1 minute to make their pitch, and then move to their left and repeat. Fundraisers must take the specific characteristics of the donors in to account each time they try their pitch.
- ✏ Repeat for the number of pairs, switch roles and retry.

6. Debrief the activity.

Here are some questions the facilitator may use for discussion:

- ✏ Can anyone share how he or she altered their pitch to address the particular interests of the donor?
- ✏ What did people like about this activity? What was challenging about it?
- ✏ What were the main things people learned from doing this activity? How can people apply these lessons? What does this say about the importance of knowing a potential donor's interests beforehand?
- ✏ How did people handle their pitches to the potential donor that generally only gives to "animal related charities?" What can we learn from this particular interchange? [Here is an opportunity to discuss the importance of exploring how you might be use an interaction to find others from whom to seek donations].

ACTIVITY: ARE WE READY?

Purpose: To help participants make sure that the group and individual donors are ready to begin the process of seeking donations

Method: large group discussion and brainstorming

Time: 20 minutes

Materials: Flip chart and markers for the facilitator; paper and pens for participants, scripts that participants previously developed

1. Go over each item on the list below to help you make sure that you have the pieces in place to start individual fundraising.

- ✏ Having brochures or other materials for potential donors
- ✏ Sending thank you notes for donors
- ✏ Making sure that two fundraisers aren't asking the same person (coordinating who we ask)
- ✏ Ensuring that we follow-up with people who want us to come back to them at a later date.
- ✏ How we plan to support members of your team who are nervous to make their pitches on their own
- ✏ Agreements about how many people each group member will ask
- ✏ Agreements about what members do when they get cash, checks, or credit card numbers from donors

2. Create a plan to address each one as appropriate.

SEEKING GRANTS

The goal of this section is to help participants anticipate and prepare for an important component of grantseeking—meeting with a funder. The introductory section also introduces the many different resources that allies and youth participants can use to identify funding sources and develop proposals.

Participant Resource: Writing Proposals

There are lots of different resources on how to write proposals. Here are some suggestions for resources and books on the topic:

- ✏ See The **Foundation Center's** short course on grant writing at *fdncenter.org/learn/shortcourse/prop1.html*
- ✏ See **YouthActionNet's** guide to granting writing at *www.youthactionnet.org/toolkit/fundraise.cfm*
- ✏ **Winning Grants Step by Step**, By Mim Carlson. San Francisco: Jossey Bass Publishers, 1995. 115 pages.
- ✏ **Proposal Writing**, By Soraya M. Coley and Cynthia A. Scheinberg. 2d. ed. Thousand Oaks, CA: Sage Publications, 2000. 101 p. (GIC: HV41 C548 2000)

PARTICIPANT RESOURCE: SOURCES OF FUNDING FOR YOUTH-LED PROJECTS

- **Abelard Foundation West.** Grants of $6,000-$12,000 for social change organizations, including those led by young people. www.commoncounsel.org/pages/foundation.html#abelard
- **Active Element Foundation.** Grants for grassroots youth organizers. Available for applicants across the US. www.activeelement.org
- **Co/Motion Matching Challenge Grant.** Program of the Alliance for Justice. Matching grants of up to $10,000 to youth-driven initiatives focused on gun violence. Available for applicants across the US. www.comotionmakers.org/grants.html
- **Do Something.** The Do Something BRICK Awards honor and fund change-makers age 25 and under who identify problems in their communities, and then get up off the sofa and do something to change their world. http://www.dosomething.org/awards/brick/
- **Freechild Project.** A really good clearinghouse on sources of funding for youth-led projects and programs. http://www.freechild.org/funds4progress.htm
- **Funders Collaborative on Youth Organizing.** Grants of $15,000 to $25,000 to support emerging and established youth organizing efforts across the country. Available for applicants across the US.
- **Grantee Exchange.** A small grants program for community organizations, including youth-led organizations, which need funds for training and travel assistance. www.commoncounsel.org/pages/foundation.html#grantee
- **Marin Youth Grants Board.** Program of the Youth Leadership Institute. Grants of up to $7500 for youth led, youth driven projects in Marin County. www.yli.org
- **Resist, Inc.** Grants of up to $3,000 to groups and organizations, including those that are led by youth. Grants must be for activist organizing or political and educational work that support movements for social change. Available for applicants across the US. www.resistinc.org
- **SHiNE Youth Venture Challenge Grant.** Small grants to young people to support projects that make a difference in their communities. Available for applicants across the US. www.shine.org
- **Sisterhood Fund.** Program of The Women's Foundation of California. Grants of up to $7,500 for organizations that support young women's and girl's leadership and well being, and for those programs where young women and girls are involved in the design. Funds are restricted to California. www.twfusa.org

- **Third Wave Foundation.** Grants of up to $5,000 for young women activists and their organizations, in areas or reproductive health, training, and education. Available for applicants across the US. www.thirdwavefoundation.org
- **Vanguard Public Foundation Social Justice General Fund.** Grants of $10,000 or less to organizing and leadership development projects especially by new and start-up organizations. Groups must be located in Northern California. www.vanguardsf.org
- **Women's Funds.** If you are a group of young women or girls, definitely check out your local Women's Fund. Many are interested in supporting emerging women's projects. See the Women's Funding Network (www.wfnet.org) to identify a Women's Fund near you.
- **Your local community foundation.** Some community foundations will be receptive to proposals from youth or young adult led organizations in their own community. They also might have their own youth-grantmaking programs that you could apply directly to. See www.communityfoundationlocator.org to find your community foundation.
- **Youth As Resources.** Occurring in more than 50 locations around the US, these youth grantmaking programs offer small grants to youth led projects and programs. See www.cyar.org for a list of local YAR programs.
- **Youth Funding Youth Ideas.** Program of CHALK. Grants of up to $40,000 for youth-led projects, programs, campaigns and organizations in San Francisco. www.yfyi.org
- **Youth Grantmakers Database.** The Michigan Community Foundation lists youth grantmaking programs across the US and Canada. Many of these youth grantmaking programs are designed specifically to give out grants to youth-led projects. See http://www.youthgrantmakers.org/YACSearch.aspx
- **Youth in Action Awards.** Program of Youth in Action. Grants of $1,000 to youth-led projects and programs that fulfills a specific community need. www.youthlink.org/us/awards.php
- **Youth Venture.** Grants of up to $1,000 for youth and youth-led groups to carry out project ideas that meet needs of their communities or schools. Available for applicants across the US. www.youthventure.org
- **YouthActionNet**. Program of the International Youth Foundation. Grants of up to $500 to youth leaders and their projects that promote social change and connect youth with their communities. Available for applicants across US. www.youthactionnet.org

Activity: Meeting with a Funder

Purpose: To help participants prepare to visit a funder at his or her office and speak about themselves and/or their proposal

Method: presentation and role-play

Time: 45 minutes

Materials: Flip chart and markers for the facilitator, role-play handouts, "Meeting with a Funder" Fact Sheets.

1. Begin by reviewing some key reasons for meeting with funders.

Place these key points on flip chart paper.

- ✏ Your chances of getting money from a foundation are higher if you get a face-to-face meeting than if you are just relying on a written proposal.
- ✏ You start a real relationship with them. Relationships with funders are incredibly important to actually getting the grant.
- ✏ A face-to-face can take advantage of your youth group's strengths. While younger grantseekers might not have lots of experience writing slick grants, most have incredible passion and commitment to what they are trying to do. A visit helps bring this out in a way that the written word might not.

2. Next, explain some issues and concerns that might come up for young people (also place on flip chart paper).

- ✏ The foundation office might be much fancier than you are used to.
- ✏ You'll be doing most of the talking.
- ✏ Younger members might get targeted for lots of questions by funders. [Funders often don't get chances to interact with young people—because of this, they might put you on the spot because they really want to hear from you.]
- ✏ The funder might not take younger members seriously. [They might ask you how your involvement "helps you grow as a person" but target adults for questions about the details of the project and the impact on the larger community. Adult members of the group might need to say something like "I think Tom can best speak to that question."]

3. Select up to 5 young people to play grant seekers. Remaining participants should be asked to observe the interaction using a fishbowl. Identify one or more adults (including the facilitator) to play funders. Remaining participants should be asked to observe the interaction using a fishbowl. If there are three or more adults, you may wish to have two concurrent role-plays.

- Describe the "setting" of the meeting in this way: "Your meeting is taking place in a very business-like office, similar to what one might find at a law or other corporate office. This is typical of many foundation offices. You wait on comfortable couches in the reception area until a receptionist tells you its time to meet the program officer. Everything looks and feels formal—really different from any nonprofit offices you've ever been to."
- Ask participants playing both roles to go with their respective groups. Give them instructions (at the end of this activity) to help them prepare.
- Allow for participants to prep for 5-10 minutes.
- Have participants go through the role-play. Begin by restating the setting of meeting and let them know that they have 10 minutes to play it out.

4. Debrief the role-play.

Below are some suggested questions:

- How comfortable were the grantseekers in their role?
- What was the experience compared to asking for contributions from individual donors?
- What lessons can be glean from the role-play that we might want to take into account when we meet our first real funder?

PARTICIPANT HANDOUT: ROLE PLAY FOR "MEETING WITH A FUNDER" ACTIVITY

Directions for Grantseekers

1. GET READY

Your role is to talk about the project idea you are seeking money for. Take a few minutes with your group to decide what you will say and who will say it. Here a few ideas for things you could talk about:

- ✏ What is your project, program or campaign idea?
- ✏ Why is it important?
- ✏ How much funding do you need to make it successful?

2. MEET THE FUNDER

They will start by explaining the kinds of interest areas and organizations they fund and the size of the grants they give. This will take about 2 minutes

Now it's your turn. You have about 2 minutes to talk about your project idea. We encourage you to use the questions listed above. Since you've already heard the foundation, you can try to fit your own mini-presentation to address some of the interests of the funder.

- - ----------------------------–cut here ---

Directions for Funders

1. GET READY

Your role is to talk about what you fund and the size of the grants. If you fund projects related to youth services youth engagement, grassroots organizing, or start-up funds for emerging groups, focus on these. Here's what you are working with: You are the sole program officer at the Funkly Family Foundation. The Foundation has been around for about 10 years, since Francine Funkly passed away and left her funds to the foundation.

- ✏ What you like to fund: Innovative, creative projects; projects with lots of risk and lots of return involved; projects where residents and community members of all ages are involved in shaping the design; projects that address root causes of community problems; Your average grant is between $10K and $20K.
- ✏ What you don't like to fund: Basic services; Large organizations (budgets of $500K or more)

2. MEET THE GRANTSEEKER

After introductions, start by describing the foundation's history and kinds of projects they are interested in. Then, wait for the grantseeker to speak. Be sure to ask the grantseeker good follow-up questions. Maintain a stern facial expression if possible.

PARTICIPANT HANDOUT: MEETING WITH A FUNDER—IDEAS FOR YOUTH-LED GROUPS

Community groups often try to meet directly with funders as a way to increase their chances of getting funded. However, it can be really a really intimidating experience for young grant seekers like you. A funder's job is to evaluate your idea closely, which isn't always fun when you are the one under the spotlight. Because they have the money, and you need their money, it feels like they have a lot of power over you. Nonetheless, we strongly encourage you and your adult allies to meet with funders. This handout offers tips on why it's important and how you should prepare.

WHY YOU SHOULD TRY TO MEET WITH A FUNDER

- ✏ **Your chances of getting money from a foundation are higher if you get a face-to-face meeting than if you are just relying on a written proposal**. This is case for younger and older grantseekers alike.
- ✏ **You start a real relationship with them**. Relationships with funders are incredibly important to actually getting the grant. Relationships don't get built through proposals, but they do through meetings.
- ✏ **A face-to-face can take advantage of your youth group's strengths**. We all struggle to convey spirit, idealism, creativity and brains on paper. While younger grantseekers might not have lots of experience writing slick grants, most have incredible passion and commitment to what they are trying to do. A visit helps bring this out in a way that the written word might not.
- ✏ **They might be able to help you.** Funders are in a position to suggest ways you could improve your project, or offer ideas for other places to seek funding.

WHAT CAN YOU USE THE VISIT FOR

- ✏ **To see if they might be interested in a very specific idea you have**
- ✏ **To talk about one or a few more general ideas you have**
- ✏ **To follow-up on a proposal you sent them**

HOW TO PREPARE FOR A MEETING WITH A FUNDER

- ✏ **Make sure you have done the research about the foundation and their funding interests**. Also, find out what you can about the foundation staffer you are visiting.
- ✏ **Work on your tone and message**. Recall the lessons you have learned in peer education, youth outreach, organizing, job interviewing or other tasks when you developed a message to connect with specific young people or adults.[5] These lessons apply here too–sometimes you have to use different approaches to when you pitch ideas to different kinds of people.
- ✏ **Get clear within your group exactly what you are seeking funding for**. It won't look good if you are not clear, or if different members are saying different things about what you are seeking funding for.
- ✏ **Practice what you will say in advance.** Role-playing is really worthwhile here.
- ✏ **Be open and honest.** It's OK to talk about what you think are going to be your challenges and struggles.
- ✏ **Show them how your ideas fit with what they like to fund.** This is a tough one. One approach is to highlight aspects of your project that is particularly good fit with the funder's interests. To use this approach, however, you really need to understand a funder's interests. Talking to someone who has gotten a grant from this funder before will be helpful in this case.

OTHER THINGS TO BE READY FOR

- ✏ **The foundation office might be much fancier than you are used to.** This might be intimidating to some members of your youth group.
- ✏ **You'll be doing most of the talking.** You'll have opportunities to ask questions, too.
- ✏ **Younger members might get targeted for lots of questions by funders**. Funders often don't get chances to interact with young people–because of this, they might put you on the spot because they really want to hear from you.
- ✏ **The funder might not take younger members seriously**. They might ask you how your involvement "helps you grow as a person" but target adults for questions about the details of the project and the impact on the larger community. Adult members of the group might need to say something like "I think Tom can best speak to that question."
- ✏ **Come up with questions you want to ask the funder**. Having more information about what a funder's interests are will increase your chances of getting funded.

5 Thanks to Sergio at C-Beyond, a youth organizing group in the SF Bay Area, for this idea.

Creating Your Fundraising Plan

The Goal of this section is to help participants develop a plan for raising funds from grants and individual donors. If you've been reading since the beginning, you've learned about two types of fundraising that young leaders can engage in. By completing these sections first, the group is in a much better position for this one: creating a fundraising plan. The materials in this section are in the form of tools and readings—facilitators are encouraged to work with participants to first become familiar with the reading, and then turn to the tool to build out their own plan. A sample plan is provided as a guide.

PARTICIPANT READING: MAKING YOUR FUNDRAISING PLAN

FIRST STEP—HOW MUCH MONEY DO YOU NEED TO RAISE?

Go through A, B and C to figure out how to do this.

A. Decide as a group how much the total costs are for your project.[6]

Example: it's going to cost $18,000 to build a BMX dirt-Jump course at the local Park.

B. Get clear about how much money you have raised so far.

Example: We have received $10,000 from the local Youth Grantmaking Board to pay for the fence and the rental of dirt moving equipment.

C. Finally subtract the money you have raised so far (B) from your total costs (A). This is how much money you need to raise.

Example: We have $8,000 to raise to meet our $18,000 goal.

HERE'S A SAMPLE WORKSHEET!
SEE PAGE 40 FOR A BLANK ONE FOR YOU TO USE!

A. TOTAL COSTS	B. MONEY YOU HAVE	C. WHAT YOU NEED TO RAISE
$18,000	*$10,000*	*$8,000*

[6] See pages 34-35 in YLI's *Planning for Action: A workbook for youth*, for help on building a budget. (http://yli.org/philanthropy/resources.php)

SECOND STEP: WHICH SOURCES OF FUNDING SHOULD WE TARGET?

Once you've completed these basic steps, you are ready to start answering the next really important question of your fundraising plan:

Which funding sources are you going to target?

In other words, in what ways will you fundraise? Are you going to focus on asking for money from individuals, or are you going to mainly go after foundation grants? Or are you going to try for a balance of both? Use the following questions below to help your group get clearer about the answer to the question above:

- ✏ Are there youth-grantmaking groups in your community that you can apply to? (Youth grantmaking programs usually make it easy for youth to apply for funds. In general, your group has good chance of getting a grant from a youth-grantmaking group if you apply.)
- ✏ Do you have adult staff or youth who have experience writing grants to adult-led foundations? (Those with some experience are critical if you want to apply to adult-led foundations. This is really going to increase your chances of getting new grants)
- ✏ Are there any adult staff or youth members of your group who have relationships with staff or trustees of adult-led foundations in your area? (Having relationships with possible funders is even more important than having good grantwriting skills.)
- ✏ Are group members willing to commit to asking a certain number of individuals or businesses for funds? (If group members can make this kind of commitment, you might want to consider an emphasis on seeking funds from individual donors.)
- ✏ Do any members of the group have "connections" with individuals or businesses that they think might contribute nice-size donations? (If this is true, raising funds through individuals is strongly recommended).
- ✏ Are there at least a few very "bubbly" or outgoing types in your group who truly like selling things or ideas? (Everyone can raise money, but those that are really outgoing might find the process of asking individuals for money more fun and easier than grant writing. They'd be more likely do a lot of it than those who need more time to practice and get prepared for meeting with possible donors.)

Out of the $ 8,000 **we need to raise, we are going to focus on the following fundraising areas: check all that apply.**	
X	Fundraising from individuals
X	Seeking grants
	Other ways of raising funds: ________

HERE'S A SAMPLE WORKSHEET! SEE PAGE 40 FOR A BLANK ONE FOR YOU TO USE!

THIRD STEP: HOW MUCH MONEY CAN WE RAISE FROM EACH SOURCE?

You're right if you think this is a really tough question. There's a lot you can't control when you are trying to get funds, but it helps to have a figure to work for, especially if you've done some thinking about what's realistic for you and your group. If we go back to the example in the first step, we know that we need to raise $8000. Let's say we went through questions in step two and decided that we wanted to focus on both grantseeking and seeking funds from individuals. Now, we need to figure about how much we need to raise from each of the categories. Should it be 80% grantmaking, and 20% individual donations, or the reverse? Remember, these are initial targets, and they are likely to change.

As you did in step two, use the following questions you can get a better sense of how much money you think you are able to raise from the sources you have chosen to focus on. Below are some questions that you can ask yourselves to get clearer about how much you can raise from the different sources you decided to target in the previous step.

- ✏ Are group members willing to commit to asking a certain number of individuals or businesses (e.g.: everyone agrees to ask 20 people that they know)?
- ✏ How many youth in your group can be involved in asking for money directly from individuals or businesses? (If you have only a few members, you are likely to raise less money than if you have a whole bunch of folks trying to help raise funds).
- ✏ If you do apply for grants, are you likely to get as much as you need, or are the funder(s) typical grant awards much less than you need? (Example: Say you need $4000 for your project. If the local youth grant making group you are seeking a grant from says that its average grant award is $5000, and you know that they fund most requests, then it makes sense to try and get most or all of this $4000 from the grantmaking group.)

<u>HERE'S A SAMPLE WORKSHEET!</u> SEE PAGE 40 FOR A BLANK ONE FOR YOU TO USE!

FUNDS FROM FOUNDATIONS, AND OTHER GRANTMAKING GROUPS	**DONATIONS FROM INDIVIDUALS**	**OTHER SOURCES OF FUNDING**	**TOTAL FUNDS**
$4,000 from the local youth grant making group *$2,000 from another foundation in our community*	*$2,000 from 50 individual donors*	*N/A*	*$8,000*

FOURTH STEP: WHAT NEEDS TO HAPPEN AND WHEN?

Now that you have identified the general amounts you are seeking from the different sources, you need to figure out the steps and timeframes to make this happen. Here are questions you need to ask yourself:

1. What things do we need to do as a group to prepare for and carry out fundraising in each of the areas we chosen to focus on?
2. How long will it take for us to see some results?

The earlier sections of this chapter can help you think about these questions.

HERE'S A SAMPLE WORKSHEET! SEE PAGE 40 FOR A BLANK ONE FOR YOU TO USE!

Our Funding Sources	*$4,000 from the local youth grant making group* *$2,000 from another foundation in our community*	*$2,000 from 50 individual donors*
Key Activities	*1. Get the youth grantmaking proposal in by the deadline* *2. Identify other foundations that fit with our ideas* *3. Meet with your potential funders (includes planning for that meeting)* *4. Write the proposal*	*1. Members identify people to ask and make commitments to raise certain amounts* *2. Flyers and other materials for donors are developed* *3. Members are comfortable with their "pitches."* *4. Participants take three months to raise their funds*
Time it's going to take	*10 months starting in November*	*6 months starting in November*

PARTICIPANT TOOL: YOUR FUNDRAISING TARGETS WORKSHEET

STEP ONE: DETERMINE WHAT YOU NEED TO RAISE.

A. TOTAL COSTS	B. MONEY WE HAVE	C. WHAT WE NEED TO RAISE

STEP TWO: FIGURE OUT WHICH SOURCES YOU ARE GOING TO TARGET.

Out of the $________ we need to raise, we are going to focus on the following fundraising areas: check all that apply.	
	Fundraising from individuals
	Seeking grants
	Other ways of raising funds: ____________________
	Other ways of raising funds: ____________________

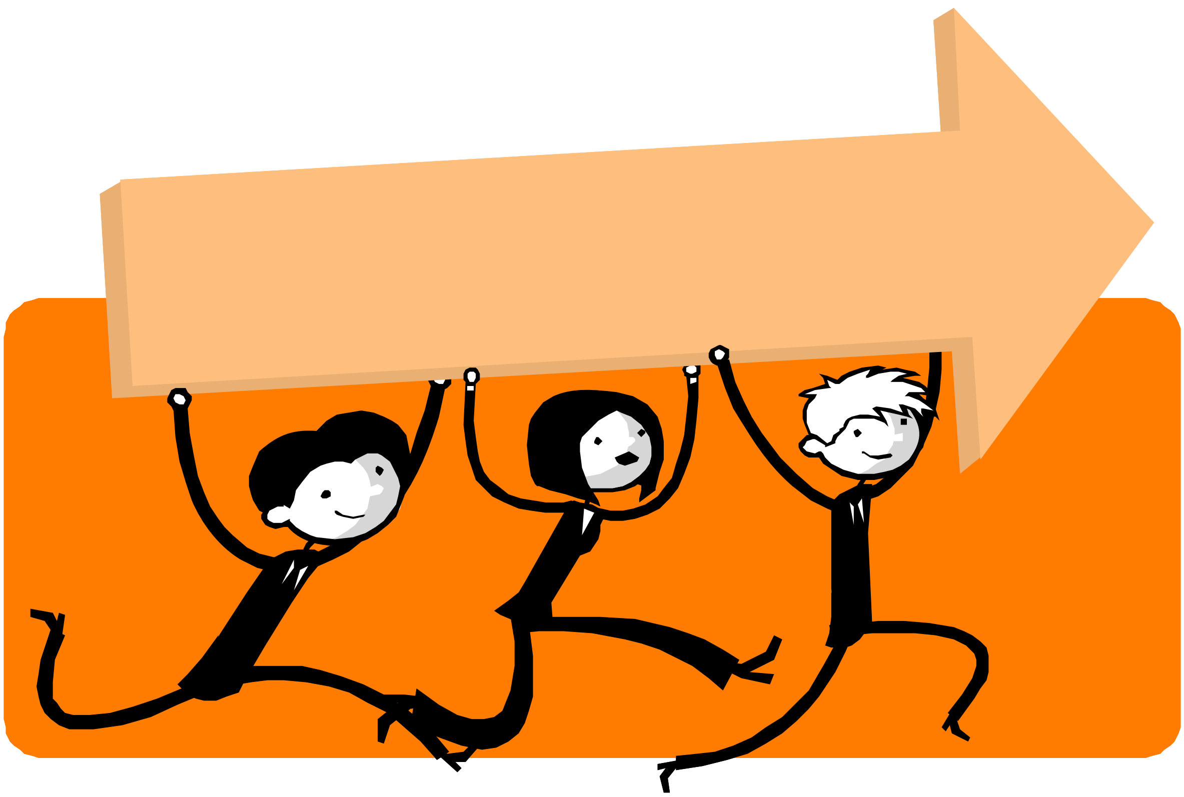
STEP THREE: FIGURE OUT HOW MUCH YOU HOPE TO RAISE FROM EACH SOURCE.

FUNDS FROM FOUNDATIONS, AND OTHER GRANTMAKING GROUPS	DONATIONS FROM INDIVIDUALS	OTHER SOURCES OF FUNDING	TOTAL FUNDS
$4,000 from the local youth grant making group *$2,000 from another foundation in our community*			

STEP FOUR: COME UP WITH YOUR IMPLEMENTATION PLAN AND TIMEFRAME.

	FUNDS FROM FOUNDATIONS & OTHER GRANTMAKING GROUPS	DONATIONS FROM INDIVIDUALS	OTHER SOURCES OF FUNDING
FUNDRAISING TARGET	$ ____________________	$ ____________________	$ ____________________
KEY ACTIVITIES	1. 2. 3. 4.	1. 2. 3. 4.	1. 2. 3. 4.
TIME IT WILL TAKE			

SUSTAINABILITY IN THE FACE OF TRANSITION



Overview of This Chapter

As an adult ally to youth-led projects, you are well aware of one of the main challenges of working with young people: they keep getting older! As youth move into young adulthood, their lives – and often their addresses – change dramatically, perhaps more now than at any other time in their lives. This means that every year, young people with whom you have worked, sometimes for several years, transfer to other schools, get involved in other interests, graduate and move on to college or the working world, and "transition out" of the group. The time and energy put into training them, helping them develop into leaders, building their skills, and giving them opportunities to shine culminate in watching them take their skills and talents into other arenas. Ideally, when this happens, the new and remaining members are positioned to take on new roles and move along the continuum of leadership. This means that youth leadership development is a **constant process** of teaching, coaching, learning, and passing on skills. Continually developing young people's skills and experience as leaders is good for both the **young people** and for **the project** itself:

- It ensures that youth are adequately prepared to make decisions about their project.
- It ensures the sustainability of the project.

The high turnover rate in youth-led groups presents a challenge: how can adult allies and youth leaders alike develop new leaders to take the place of those that move on, and how can they "manage" the leadership transition in order to ensure the project's strength and viability as the names and faces change?

Often, groups don't take the time to answer those questions, which means that they don't prepare well for transition or change. They wait until aging out youth leaders are on the verge of leaving – usually too late to begin any real transfer of skills and knowledge. In order to prepare for the departure of your youth leaders, we have collected some ideas and tools for you to use in your project, including:

- ✏ A discussion of the difference between change and transition
- ✏ A tools and activities for recognizing characteristics of the most difficult stage of transition, the Neutral Zone
- ✏ Mentoring
- ✏ Tools for preparing for the transfer of skills and knowledge and for setting up mentoring relationships.
- ✏ Tips for establishing a Group Historian, and an activity designed to generate a historical archive

UNDERSTANDING THE PROCESS OF TRANSITION

THE PURPOSE OF THIS SECTION is to introduce some theory and concepts around transition, to normalize it, and encourage leaders and participants to anticipate it. It uses readings and tools to engage participants in discussion about transition, and help them understand which stage of transition they are in.

Adult Ally Reading: Understanding the Process of Transition

One doesn't discover new lands without consenting to lose sight of the shore for a very long time.

– Andre Gide, French Novelist

When your youth leaders transition out of the group and move on to another phase of their lives, things change for everyone involved. This can be both disorienting – we can lose sight of the "shores" we are familiar with – and exciting –we can discover new things in the process. In order to make the most of the leadership transitions the group will experience, it's useful to understand the dynamics of a group that is changing. The ideas here are based on one theory of change and transition, as presented by William Bridges in his book *Managing Transitions: Making the Most of Change* (1991). According to Bridges, it's important to recognize the difference between change and transition. **Change** refers to the specifics of what will be different and **transition** is the process that living, breathing people go through – either *actively* or *passively* – as a result of the change.

In other words, change is just change until you add **human beings** to the equation; then change becomes the process of transition! It looks like this:

change	+	human beings	=	transition

The starting point for any transition is saying goodbye: to the way things used to be, to the people who will be leaving, and to life as you have known it up until now.   Here's an example:

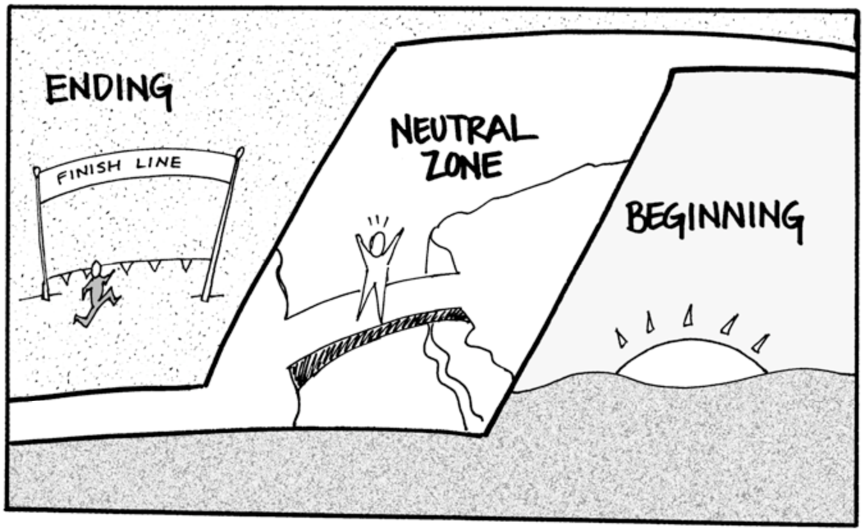
SCENARIO: 14-year old Anissa just graduated from middle school. She has attended this school since the 1st grade. For high school, she'll be going to a new and bigger school, where she doesn't know the teachers and doesn't yet know where she will fit in the new community. And sadly, some of her good friends will be going to different high schools, so she'll have to get used to not seeing them everyday.

What is the CHANGE?	Anissa will be in 9th grade, instead of 8th, and will be going to a new and bigger school.
What is the TRANSITION?	Anissa will have to go through a process of saying goodbye (to the school, teachers, and some friends), learning the rules and norms of her new school, making new friends, and becoming a member of a new school community.
What is the STARTING POINT of this process?	Anissa's starting point is to recognize what is ending for her: for starters, her life in a school she knows and loves, her position as an 8th grader (the *senior* grade in the school), her daily interaction with friends who will be going to another school. (There are likely many more!)

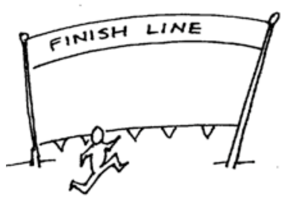
While they are different, change and transition go hand in hand: unless the transition happens well, change will either be much more difficult than it needs to be or will fail. *Nothing so undermines change in a group as the failure to identify the starting point of the transition process and to think through who will have to let go of what when change takes place*. The failure to identify and be ready for the endings and losses that change produces is the largest single problem that groups in transition encounter. So how can you address this problem? By doing the following:

- Be aware of the natural stages of transition, especially of the middle stage, which Bridges calls the Neutral Zone.
- Help group members understand the stages of transition and identify how it applies to their situation.
- Identify the starting point of the transition your group will make. Do this by thinking about the following question: **WHO IS LETTING GO OF WHAT** for the change to take place?

Stages of Transition



Characteristics of the Stages of Transition

ENDING	NEUTRAL ZONE	BEGINNING
		
Characteristics of Endings • "Overreacting" - reacting to past or symbolic losses as well as current ones • Signs of Grieving (denial, anger, bargaining, anxiety, sadness, disorientation, depression)	**Characteristics of the Neutral Zone** • Anxiety, Motivation • Reemergence of old weaknesses • Overloaded systems, mixed signals, a system in flux, and therefore unreliable • Polarization of participants and loyalties • Creative opportunity!	**Characteristics of Beginnings** • Re-activation of old anxieties, b/c the new beginning ratifies the ending • Represents a gamble, a risk • The risk resonates with past memories of success and failure • beginnings destroy what was a pleasant experience for some in the Neutral Zone • ORGANIC PROCESS • Recognize that people are 'beginning' at their own pace - overlapping timing of individuals who are making the beginnings *(the marathon effect)*

© William Bridges, *Managing Transitions*, 1991

ACTIVITY: EXPLORING TRANSITION

Purpose: To help participants think about and understand the different stages of transition and to consider how they have already experienced transition in their lives.

Method: Presentation, role-playing, large group and pair discussions

Time: 45 minutes

Materials: Flip chart and markers for the facilitator, role-play handouts

1. First, go over the Stages of Transition and the Characteristics of each stage.

It may be helpful to reproduce the graphics on the previous page on Flipchart paper to post.

2. Next, pass out the Handout on page 55 : A Story of Change.

Explain that this story will help us illustrate how transition happens in a group of people. Ask for six volunteers: one person to be the main narrator, and 5 to read the lines of the five characters in the story. Have the volunteers read the story to the rest of the group. (If you have enough people, 5-6 per group, divide the large group into smaller ones and do this activity in small groups.)

3. Have the group (or groups) discuss the following questions, referring to the Characteristics of the Stages of Transition as they do so:

- ✏ What characteristics did you find in the story? How did they show up?
- ✏ What other things could have been written into the story to capture other characteristics of the stages of transition?

4. The next part of this activity is done in pairs.

Break everyone into pairs. Each person gets five minutes to describe a change – personal, professional, school-related, or otherwise – that they have gone through. Each person should answer the following questions (post these on flip chart paper):

- ✏ What did you lose in the change? What did you gain in the change?
- ✏ What did you do to take care of yourself through the change? What do you wish you had done to take care of yourself through the change?

5. Debrief the activity

✏ Ask for volunteers (as many as you want) to share either what they talked about in their small group (although each person should only speak about his or her OWN experience and not about his or her partner's, so as to respect each other's privacy), OR what they learned about transition through this activity and how they might apply it in the future.

HANDOUT FOR EXPLORING TRANSITION ACTIVITY: A STORY OF CHANGE

It's May. It's time for finals. That old familiar feeling of cramming for exams, staying up all night to write that term paper, guzzling caffeine and pizza...we've all done it several times before. At the end of each semester, we participate in a ritual of endings. Schedules are wacky, people are up at all times of the night, the rest of life gets put on hold. It's the same old final week...or is it?

No, this time is different. All those other times, the semester gave way to another semester, or a summer break, and then there was a return to the familiar rhythms of the school year. But now, four, five or six years into college, the pattern is established, the schedule routine...we know what's expected of us, and we now all the players. We know our classmates, our roommates, our professors, and the idiots in the Registrar's office. We know how to get where we are going and who will be there when we arrive. We know where the best latte can be found, where we can hang out all day with a cup of coffee and not get dirty looks from the wait staff. We know who the big fish are and who the little fish are...we ARE the big fish, who cares how big the pond is. This is our world and guess what? It's time to leave.

This is the story of five friends who are graduating from college and entering the world of work. Some have jobs, some are still looking. Some will be moving away from each other and starting new lives. Today, all the finals are taken, the papers handed in. Grades – the last time they'll matter (don't even THINK about graduate school) – are in someone else's hands. Graduation is tomorrow.

Ivy: I guess this means no more late nights at the coffee house?

Owen: No more all-nighters together.

Georgette: No more hanging out on the quad!

Joe: Yeah, ...you know what I'm going to miss? I'm going to miss sleeping till 11:45, rolling out of bed and barely making it to class! Think I can find a job where I can come in at Noon and leave at 4:00? And still make decent money?

Rachel: I love this place! I don't want to leave yet...I don't think I'm ready! Now we gotta say all those good-byes...go to a bunch of graduation parties, sign a bunch of cards...

Owen: I'm not going to any stupid parties! Everyone is so phony at those things! "LET"S STAY IN TOUCH! GIMME YOUR EMAIL! I'm GOING TO MISS YOU SOOOOOO MUCH!" PLEASE! Give me a break. Let's just GO without all that stuff. Come on, we're all heading to cool things in the future...I'm not going to miss it, there's too much to look forward to.

Ivy: I don't know what you're all are making such a big deal about. Things aren't going to change that much. I mean, come one, it's not like we're all growing new heads or something. We're still the same people!

Joe: What do you mean nothing's going to change???? **EVERYTHING's** going to change. You're the one that loves all those late night McDonald's runs…whose gonna do those with you now? And that's not the least of it: do you realize that we are actually going to have to WORK for a living? I've never done that before! I kinda like having no responsibility

Owen OK, speak for yourself, silver spoon boy – the rest of us have worked this whole time. Oh, I'm sorry, is WORK STUDY a dirty word to you?

Georgette Just calm down, both of you…you're just stressed about graduation…don't take it out on each other, OK?

GRADUATION DAY

The emotions that these friends are experiencing play out in some interesting ways. They have planned a combined graduation party, with all of their families and friends, happening at a local park. They have each taken different jobs to plan the party. Rachel was supposed to reserve a space at the park, but in the preceding weeks, she kept forgetting to do it. Lo and behold, here was the day of the party and she realized with a panic that everyone was expecting her to have secured the reservation, and she had dropped the ball. She gets up really early and races to the park to try and block off some space and get things taken care of before anyone finds out she goofed up. Luckily, she's able to do this and get back home in time to get ready.

As it happens, Owen is one of the speakers for graduation, and he was up all night working on his speech. A few hours before the ceremony, he finally heads for a quick nap; Ivy agrees to wake him up in time to go over the speech one last time before they all go to the stadium. Well, Ivy herself falls asleep. When Georgette calls to say she's on her way to pick them up, they both wake up in a panic; Ivy insists her alarm clock picked this day not to work (she's SURE she set it…). There's not time for Owen to go over the speech. Georgette arrives, but realizes she lost their seat assignments, so when they all get to the stadium, she has to race around finding one of the coordinators to help them all figure out where they are supposed to be. Family is everywhere, snapping photos and lending their own unique dysfunction to the proceedings. Joe keeps hiding from his mom and dad, avoiding till the last possible second the inevitable "phony" greetings and small talk. Things finally get worked out. They all find their seats, Owen's speech goes well, and they make it to the park, where there is plenty of room for them (Rachel breathes a sigh of relief). The last minute chaos has made everyone feel a bit stressed and jittery.

SNAPSHOTS OF THE FOLLOWING FEW WEEKS:

- Joe and Georgette are the two who do not yet have jobs. The weeks following graduation see them handling this differently. Joe can't motivate himself to put his resume out there. He gets up in the morning with intentions to "conquer the job market" but things come up, the soccer game he wasn't going to watch ends up taking up his whole morning. He finds all kinds of reasons NOT to follow up on various leads that have come his way. He stalls...he procrastinates. Georgette does the exact opposite. She becomes obsessed with finding a job, and cannot be bothered to pay attention to anything else. She misses social events, cancels appointments that aren't job related, goes through 11 drafts of her resume, spends every waking hour calling employers, sending resumes, networking, selling herself. She applies for anything that is even remotely connected to her field of interest.

- Interestingly, after about a month of their very different approaches, they each temper their extremes. Georgette decides it's OK to enjoy herself and not be so "turbo" about the job search; Joe gets off his duff and starts doing some serious looking. By the third month, they both have great jobs.
- Ivy, who worked in the Admissions Office while she was in school, has found a temporary summer job in a high tech company. She arrives at work all decked out in her professional attire (the Admissions Director had been a stickler for "proper work attire," and is mortified to be the only woman with hose on). Everyone is dressed very casually and she sticks out like a sore thumb. A few weeks into the job, she's in a team meeting, in which everyone is involved in a pretty heated conversation about a new direction the company may go in. It seems that everyone, from the president to the admin. staff, has an opinion. She keeps quiet. She remembers working with her previous supervisor about the "proper channels" for feedback. She decides to write her ideas down in a formal memo and submit them to her new supervisor. Later, this new supervisor asks to speak with her and tells her that she (the supervisor) was disappointed that Ivy didn't take the opportunity to add her input at the meeting. It appeared that she was disinterested in the topic. Her supervisor, a woman Ivy really likes and wants to impress, asks Ivy to work on actively contributing "in the moment." After a few weeks with these kinds of experiences, Ivy's head is spinning, trying to get used to the ways this place operates.
- Over the summer, as the group of friends prepares to "break apart," with Owen, Rachel, and Joe all moving to new cities, they experience some fracturing in their relationships. Some of them want to hang out at all the old places and do all the same things they've always done, some are utterly uninterested in these activities. Feelings were hurt, grudges held. These five good friends experience some intense mixed feelings...being mad at each other while also aware that they will miss each other a great deal.
- The good news is, that one year later, all of them are in decent jobs that they mostly enjoy, and have good living situations as well. They stay in touch, and are excited to learn about the new ways in which everyone is growing and changing. They have successfully transitioned into the world on work.

Participant Tool: Is Your Group in the Neutral Zone?

Here is a grid to help you identify characteristics of being in the Neutral Zone, as they might pop up in your group. Being aware of the issues is half the battle! It's easier to handle what might otherwise appear to be "acting out" if you can remind yourself that the behavior is normal, caused by transition, and part of the process.

SYMPTOMS OF THE NEUTRAL ZONE	**YUP, WE'VE GOT THIS**	**HOW IS IT SHOWING UP?**
• *Increased Anxiety*	X	*Group can't seem to focus on one topic; other concerns keep popping up when we are trying to talk about topic X.*
• Increased Anxiety		
• Decreased Motivation		
• Re-emergence of old weaknesses		
• Overloaded systems, mixed signals, a system in flux and therefore, unreliable		
• Polarization of participants and loyalties		
• Creative opportunity		

PARTICIPANT TOOL: STRATEGIES FOR TAKING CARE OF YOUR GROUP—A CHECKLIST FOR CHANGE

Moving out of the Neutral Zone and into the next phase of transition isn't easy. But there **are** things you can do to help your group take the first steps. Below is a checklist of things you can do, either on your own or with your members, to manage the process of **leadership transition**:

✏ FIRST AND FOREMOST, **remember** that transition is NORMAL.

- Recognize that change and transition are constant and integral parts of life, and especially of your group, since **aging out** is such a predictable phenomena in youth-led projects.
- Remind yourself that members are experiencing normal symptoms of life in the neutral zone and not something unique or strange – or wrong.

✏ **Identify** the change by asking yourself the important questions.

- What is changing, for you individually and for the group as a whole?
- What will others will lose in the transition?
- What are current losses and what are old wounds? In other words, which losses are coming from this current change and which losses are from older changes but are being reactivated by current events?
- What are the constants? What will stay the same? How do can you nurture those things? What are you likely to lose in the transition? Can you speculate about what?

✏ **Help** the group think about changes they have made in their lives and how they can apply lessons from those experiences to the current change happening in the group.

- What did you lose in the change? What did you gain in the change?
- What did you do to take care of yourself through the change? What do you wish you had done to take care of yourself through the change?

- ✏ **Find** quiet times and stable places to take time-outs: find ways to give yourself and the group a respite from the chaos that might be swirling around you. Take care of members with a special event of some kind.

- ✏ **Set** short-term objectives for yourself and for the group to restore a sense of movement and achievement.

- ✏ **Consider** the group's possibilities in a new light! The absence of key leaders may leave a void, but it also makes space for new leaders to emerge. Use this opportunity to re-assign tasks to your members. Shake up the balance of responsibilities – but provide support for people to be able to succeed at tasks they may not have done before.

- ✏ **DO** THINGS DIFFERENTLY!! Encourage members to step out of their comfort zone, participate in the group in a new way, and be intentional about learning something new about the group. Actively and purposefully doing something new is one way to counteract the feeling of being lost, left out, or out of control in the midst of change:

PASSING THE BATON: SHARING LEADERSHIP AND RESPONSIBILITIES WITH NEW AND CONTINUING MEMBERS

THE GOAL OF THIS SECTION is to help group members prepare for the inevitable transition. When you lose experienced youth leaders, you are left with a void. But, as mentioned before, you are also handed an opportunity! This is an ideal chance for you to invite other members (continuing or new) to step into new leadership roles and take on new responsibilities. And the best way to take the fullest advantage of this opportunity is to **plan for it.** Don't wait until your "transitioning" youth are just about to leave or already gone. Three areas of preparation are considered: establishing a group historian; building a mentoring program; and creating a system for transferring responsibilities over time.

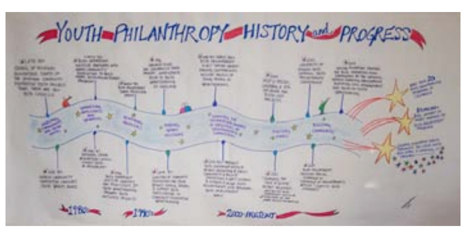
PARTICIPANT READING: HOW TO BE A GROUP HISTORIAN

What is a Group Historian?

A Group Historian is responsible for recording the life story of your group. She collects information about the group–meeting minutes, reports, news articles, photos, videos, web pages, recordings, newsletters–and keeps it organized and accessible for everyone. This is a vitally important role for your project: you need to be able to share your story with other people, especially new members. Being able to tell your story contributes to the long-term sustainability of your project by clearly defining how you have gotten where you are and making it possible for members to take ownership of the group history on an on-going basis. The ideal Group Historian is someone who is organized, reliable, and detail-oriented.

Creative Ideas for Your Group Historian

- **Photo albums** and **scrapbooks**
- **Video archives**: interviews with youth and adult members
- **Binders** of print materials, such as a binder devoted to media coverage, one for Meeting Minutes, one for project materials like flyers, promotional materials, newsletters, correspondence, etc.
- **Tell Me A Story**! Write a personal narrative that tells the story of what the project does, or of one person's involvement with the project. *("Once upon a time, a small group of people wanted to change XX about their community…")*
- Create timelines that show the group's progress toward its goals.
- Create graphic representations of group history that tell your story with pictures. Here's an example:



- Give **HISTORY LESSONS**. Set aside time periodically for new members to have a "History Lesson" where they can look at some of your favorite or most important historical archives. Not only will this help them understand the group, but also it will be an attractive invitation to join in and be part of such a cool group.

ACTIVITY: BUILDING GROUP HISTORY

Purpose: To help participants collectively record their history

Method: Brainstorming, group work

Time: 45 minutes – 1 hour

Materials: Flip Chart and markers; photo albums; binders; program materials, scissors, tape, general office supplies

This is a "Working Activity." Encourage everyone to bring with them as many items related to the group's history as possible, including: photographs, media coverage, meeting minutes, project materials like flyers, promotional materials, newsletters, letters, etc.

1. Before convening with the group, create a blank time line on flip chart paper that shows the time the group has been together.

✏ Use a range of dates that includes the involvement of everyone in the group.

2. Then have the group brainstorm the "Main Events" of their work together on flip chart paper

✏ Ideas include: Orientation events, planning retreats, campaign events, celebrations, important meetings, etc. Encourage participants to include EVERYTHING they can think of, the silly and the serious; all of it makes the group's history. You can always edit less "important" things out of any list you show to outside people.

3. Next, roll out the blank timeline and tape it to an accessible wall.

✏ Provide plenty of markers, and have the group place each event along the timeline. The more fun they have, the better; encourage them to add pictures, use lots of colors, and generally give the timeline LIFE.

✏ Be sure to give everyone plenty of time for this part of the activity. If people are really into it, let them keep going.

4. The next part of the activity depends on what materials everyone has brought with them.

✏ Survey what everyone has and identify general categories: PHOTOS, CD's, MUSIC, NEWSLETTERS, FLYERS, MEDIA COVERAGE, etc.

- ✏ Assign groups to each category and give them the job of figuring out a good way to compile and display their information. Binders, photo boards, albums, files, etc, are ideas you could suggest.
- ✏ Next, give them time to organize their materials.

5. When you're done, you'll have the beginnings a GREAT historical archive of your group's work, to which you can add as time goes on and as people find more materials to contribute.

PARTICIPANT TOOL: PREPARING TO TRANSFER LEADERSHIP

When established leaders "age out," you still need to get the work of the project accomplished. How are you going to make sure that things get done and that new and continuing members know what is expected of them? One way is to be intentional about transferring leadership, skills, and responsibilities to the members who are "left behind." The worksheets on this page and the next one will help you do that.

STEP #1: Identify 3-5 main skills/work areas that are critical to the project's success.

Critical Skills or Work Areas:

STEP #2: For each main skill or work area, identify 3-5 key tasks that need to be done on a regular, ongoing basis:

	3-5 KEY TASKS FOR EACH SKILL
SKILL #1	
SKILL #2	
SKILL #3	
SKILL #4	
SKILL #5	

STEP #3: Place each task you identified on the previous page into one of three categories: tasks for new members; tasks for somewhat experienced members; and tasks for experienced youth leaders. Assign responsibility for these tasks by adding names to the WHO? columns. Repeat this process as often as necessary, and definitely whenever a young person transitions out of the group and leaves a blank space on this chart. Re-assign tasks as needed!

Column A: TASKS FOR NEW MEMBERS		**Column B:** TASKS FOR MEMBERS WITH SOME EXPERIENCE		**Column C:** TASKS FOR EXPERIENCED YOUTH LEADERS	
Task	**Who?**	**Task**	**Who?**	**Task**	**Who?**

PARTICIPANT READING: WHY MENTORING?

Mentoring relationships are great for all kinds of reasons. Certainly they help new members get oriented to the group and feel comfortable participating. But they can also help you ensure that skills and responsibilities are transferred from one member to the next in an on-going way.

When you set up mentoring opportunities for members, you are establishing a mechanism for skills to be transferred from member to member. You are preparing for that day in the future when your established leaders will transition out of your program, leaving behind younger participants who can take over the groups' responsibilities.

You can use the chart on the previous page to help you identify good mentoring pairs. This can be done informally, by using the chart as a general guide for who is able to do what and for whom, or more formally, by assigning pairs based on interest and ability in the skills your group depends on. Use the chart to match members from Column A with members from Column B or C. This way, newer members can shadow more experienced members, and skills and knowledge can be transferred in an intentional way.

Participant Tool: Suggestions for New Mentoring Relationships

1. Hold a "Get to Know You Event" for all new and continuing members

2. Establish ways to communicate with and stay connected to new members. Make sure the new members know about and attend each meeting (via reminder calls, emails, etc.)

3. Provide specific support at the first group meeting:

- ✏ **ARRIVE EARLY**: Have each mentoring pair meet before the group meeting to get ready by doing the following:.
    - Go over the agenda; give some general context information for why each item is on the agenda; talk about ways for people in general and the new member in particular to participate.
    - If a mentee is hesitant to participate, remind him or her that it is important to participate and support him or her to feel comfortable doing so.
    - Set goals for meetings (for example, new member will speak up at least 3 times, or will ask 2 questions about agenda topics)
- ✏ **INTRODUCTIONS**: At the beginning of the meeting, have each mentor introduce each mentee to the group, and have continuing members do a "go-around" to introduce themselves to new members. Give some parameters, like: Give your name, how long you've been involved, what your favorite part of being in this group is, etc.
- ✏ **DEBRIEF**: Check in, even if it's briefly, after the meeting. The mentor should answer any questions that the mentee has and in general seek the mentee's feedback, impressions, and observations.

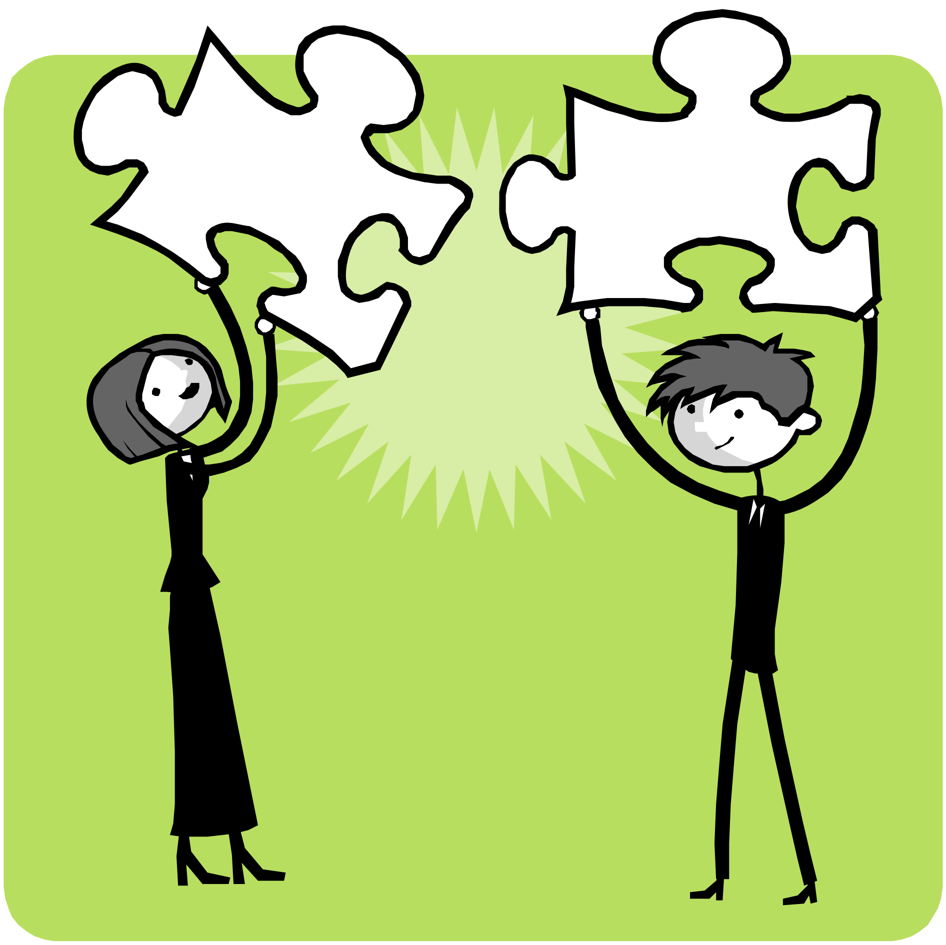
4. Host a History Class for new members. This is an opportunity to showcase your historical archives and tell your story.

5. GENERATE POSSIBILITIES. Help new members think about specific things they want to do with and for the group. Help them think about skills they already have that they could contribute to the group AND skills they would like to learn.

6. EACH ONE, TEACH ONE: Have each Mentor "teach" their mentee how to do at least one specific thing that helps the group do its work.

- ✏ If the Mentor prepares the agenda for each meeting, have him show and practice the steps of this process to his mentee.
- ✏ If the Mentor is skilled at Public Speaking, have her describe how she does this to her mentee, including how she prepares or practices, tips and tricks, lessons learned, etc. Have them practice Public Speaking together.
- ✏ If the Mentor has lots of experience organizing a specific, annual project, have her give her mentee a mini "orientation" about how the project gets done.
- ✏ ALWAYS leave the door open to Mentees to be able ask follow-up questions of the Mentors.
- ✏ These kinds of "teaching moments" do not have to be strictly between a Mentor and a Mentee; they can be done with two or more new members who are interested in learning more about a particular skill or responsibility.

USING EVALUATION TO STRENGTHEN YOUR PROJECT



Overview of This Chapter

Evaluation is a critical part of a youth-led group's work to be sustainable over time. By doing reflection as the project is underway or after its completion, a youth-led group can identify ways to strengthen its work or take a different direction if necessary.

This chapter of the toolkit introduces the concept of evaluation and provides a framework for young people to both evaluate the ongoing day-day work as well as the impact of their projects or programs. You will find inside this section important activities that can help participants learn and practice key skills. Furthermore, the handouts and readings give participants background info and tools that they can directly employ when evaluating both short-term activities, like meetings, as well as their overall project.

Evaluation—Why to Do It? Who Should Do It?

The goal of this section is to encourage youth participants in youth-led groups to take evaluation seriously, to show how they are likely using it already, and to see how important it can be to strengthening their projects and programs. This section uses readings and activities to convey these ideas.

PARTICIPANT READING: YOUNG PEOPLE AS EVALUATORS

Evaluation—The Word That Makes Us Tune Out

Most people hear the word evaluation and they tune out. Why? Because…

- ✏ It sounds like numbers and statistics and surveys, which can be confusing or intimidating.
- ✏ To some people it sounds like someone from outside of their community or program trying to tell them what to do and what not to do. For a lot of young people, it means adults evaluating them.
- ✏ Lots of people have had an experience with an evaluation where they fill out a survey or give ideas in a focus group and never see the information compiled or never see the ideas or input they shared being used to make a change. Whether it was a survey to evaluate a class, or to find out how satisfied they were with a program they are in, people rarely see action taken with the information they share.

Some Youth Friendly Definitions of Evaluation

- ✏ Evaluation is: collecting information about something to better understand it and to make good decisions about what action to take.
- ✏ Evaluation is: collecting information from the people most affected by the issue to come up with new ideas to make changes and improvements to a program, a school or a community.
- ✏ Evaluation is: something most people already do in their day-to-day life and something that young people already do.

Young People Evaluate Every Day

We also think of it as something most people, including youth, already do in their day-to-day life and something that young people already do. Here are examples of how young people might be doing evaluation

- ✏ *How should I decide what movie to see?*
- ✏ *How should I decide what album to buy?*
- ✏ *How should I decide what class to take or which teacher to get?*

To answer these questions, its likely that they are gathering information from friends and family, reading reviews of albums or movies, seeing trailers or sample clips or doing other information gathering before deciding what decision to make.

A lot of times people think of evaluation as something adults do. We think it is important for youth to take the lead in evaluation because youth have a lot to contribute to evaluation and can learn a lot by doing it.

PARTICIPANT HANDOUT: EXAMPLES OF HOW YOUNG PEOPLE USE EVALUATION IN THEIR EVERYDAY LIVES

IN YOUR LIFE: Say your goal is to get a job. If you have been offered three jobs, how would you decide which one to take? You might collect information about the location of the job, the hours, what the boss is like, what the other people are like, what you would learn from being there, how much money you would earn—all to figure out which job to take. Once you have all of the information, you would use the information to make a decision about which one is the best for you. That is evaluation.

IN YOUR SCHOOL: Say it seems like your student council doesn't really represent the student body and you want to know if this is really true and what other people think, so you can deal with the issue and get better representation. You might collect information about the demographics of the student body, the demographics of the students that run for student council, how students decide to run, who actually votes and who is getting elected. That is evaluation.

IN YOUR PROJECT: Another way to think about evaluation is to find out more about something you are already doing to to see how you can change and improve it. Evaluation can help you collect information about what is working and not working so you can make good decisions about how to improve what you are doing, whether it is a class or a project you are working on. That is evaluation.

ACTIVITY: A GROUP DEFINITION OF EVALUATION

Purpose: To help participants move away from negative images of evaluation by helping them create their own definition

Method: Brainstorming and discussion

Time: 20 minutes

Materials: Flip Chart and markers

1. Begin by finding out what evaluation means to your group.

✏ Ask the group:

What are the first things that pop into your head when you think about evaluation?

✏ Write their answers down on flip chart paper.

2. Once you have a list of words, ask the group to reflect on the list—what do they notice about the words?

✏ Usually what happens when you ask this question is that (1) you get a list of mostly negative words rather than positive words and (2) you get mostly nouns and adjectives and not words that reflect action, like improving, leading, changing.

✏ Conclude this piece by asking the group what experiences they have had with evaluation and how those have influenced the words they chose.

3. Finally, ask them to come up with their own definition based on what was discussed and how they want to use evaluation with your group.

✏ Refer to some youth-friendly definitions of evaluation on the previous participant reading.

PARTICIPANT READING: WHY IS IT IMPORTANT TO EVALUATE

Why It Makes Sense For Your Project

Evaluation will give you information that will help you better understand what you are doing and how to improve it. Here are some more reasons why:

- ✏ To learn more about what you are doing and how you are doing it
- ✏ To find out what other people think
- ✏ To figure out ways to improve what you are doing
- ✏ To explain to other people what you do and get them interested
- ✏ To show that your program has an impact and makes a difference
- ✏ To make the case to funders about why they should fund your program

Why It Makes Sense For You

Those are reasons about your program. What about you- what will you get out of it? Evaluation will give youth and adults an opportunity to build skills, relationships, and leadership experience that can be useful in other areas of their lives. Here are what young evaluators have said about how they've benefited:

- ✏ SKILLS- Critical thinking, Math, Listening, Public speaking skills
- ✏ GETTING TO KNOW PEOPLE- the other youth in their program, the adults in their program, and other youth that aren't involved
- ✏ KNOWLEDGE- Youth have said that they learned a lot about from evaluation about project planning and design, how to talk to people you don't know, developing good questions, and collecting and analyzing information.
- ✏ CONFIDENCE- Youth have said that their evaluation work has made them feel more confident about what they can do to help their community and project.
- ✏ SENSE OF PURPOSE- Youth have also said it gives them a way to make a real difference in their project because they are bringing people together and improving the project.

Activity: Who is the Expert?

Purpose: To help participants understand different ways to think about "the expert" and include youth in that definition

Method: game

Time: 10 minutes

Materials: prepared post-it notes with names of celebrities, historical or public figures on them, enough for each participants

1. Begin by having everyone stand up and make a circle.

✏ Have someone go around and stick a post-it on each person's back with a name of a celebrity, historical figure, or public figure on it.

2. Next, have each person find a partner.

✏ Look at their back to see 'who they are' and then each person can ask three yes/no questions to try and figure out who is on their back. When a pair is done with the 3 questions, have participants find another partner and repeat the steps until they figure out who they are. Once each person has figured out who they are, have the group debrief.

2. Debrief the activity.

✏ Ask how many questions people needed to ask to figure out who they were.

✏ What were the keys to finding out who they were? Was it the questions they asked? The people they asked?

✏ Closing: here is a suggested script you could use for a closing statement.

You want to find people with expertise in the area you are asking- if they don't know what or who you are talking about, they cannot really answer the questions. It helps to talk to a lot of people when you are trying to get your question answered. The way to make evaluation work is to make sure the people affected by the issue or program are involved in putting the evaluation together and in using the information collected to make a change. For example, if the evaluation is about a youth program, then the youth participants and staff need to be involved in collecting the information. Usually youth do not have a chance to participate in figuring out what the questions should be, who should ask them and how, but we think youth should be involved in evaluating youth issues and programs. Instead it is often experts, who are usually adults, that get to decide what to ask and how.

When to Evaluate?

THE PURPOSE OF THIS SECTION is to educate participants about how evaluation can be used depending on the point of time of your project. Evaluating the success of your project at its completion is important; it might be just as important to evaluate how you are doing while the group is in the mix. This section offers readings and handouts to help participants understand the different times to evaluate, and the approaches that can be used at those different times.

Participant Reading: When Should You Evaluate?

Before You Start...

The first time to evaluate is before you have started your project so that you know what is going on and what you are really trying to do with your project. <u>It will help you create your goals.</u>

A lot of times we have assumptions about people and things. Sometimes we are right and sometimes we are off base. <u>It is important to make sure you really understand something before you make decisions about it</u>.

For example, you might think that it is a good idea to buy pepperoni pizza for a group of youth coming to a training because you think youth love pepperoni pizza. But what if they are vegetarians or have religious reasons for not eating meat? Or school administrators might think that students who are not turning in their homework are not interested in learning or are bad students and give them detention when what they really would need to do their homework if they had more support to do it, like a tutor. Many decisions that get made and many programs are based on people's opinions and assumptions about what is needed and not on information they have collected from people affected by the situation. <u>It is important for you to have the information you need to create a project that is based on good information.</u>

During...

It is important to evaluate along the way to make sure you are using the best ideas you can. Stopping to reflect after a meeting or after a training to ask yourselves what worked, what didn't work and what you would do differently next time helps you learn as a group about what to keep doing and how to improve. It helps get everyone's ideas and input and helps make sure that you are using your time and resources in the best way possible.

And After You Are Done

It is important to evaluate after an event to see how it went or when your project is over to see whether it made a difference. After all of the work you put into your event or program, it is important to know whether there is any impact.

For example, say a group collected information from youth in a community center and found out they wanted a DJ program and then created one. *They might want to know how the process went:*

- ✏ How many youth participated?
- ✏ How many hours of training did they get?
- ✏ How many kept participating?
- ✏ Did they like the program? Why or why not?

They might also want to know what impact it had:

- ✏ What new skills did youth learn from the DJ program?
- ✏ Did they make new friends and learn to work together as a group?
- ✏ Did they get any chances to apply their new DJ skills?
- ✏ Do they feel more confident in themselves because of the program?
- ✏ How did it affect the way they see themselves?

ACTIVITY: EVALUATING UP FRONT

Purpose: To expose participants to reasons and methods for using evaluation before you determine your project idea

Method: Presentation and role-playing

Time: 20 minutes

Materials: Flip Chart and markers for facilitator; paper and pens for participants

1. Begin by explaining why evaluation can happen even before your project begins. You may choose to use the first section of the participant reading (evaluating up front as talking points).

2. Have participants practice evaluating up-front assumptions about people's interests and needs.

a. Have everyone think of a question like the ones below:

- ✏ Dogs or cats: Do you think that more people in the room like cats or dogs?
- ✏ 70s, 80s or 90s: Do you think that more people prefer the 70s, 80s or 90s?
- ✏ Soda, Water or Juice: What do they prefer to drink?
- ✏ Renting movies or going to the movie theater: Do you think more people prefer renting or going to the movies?
- ✏ Rap or classic rock. Do you think more people like rap or classic rock?

b. As individuals, have participants write down the categories—for example, the words dogs/cats—on their paper.

c. Next, ask them to make a prediction, a guess or hypothesis about what they think people in this room think or like. For example, their hypothesis may be that most people will prefer dogs.

d. Then, have participants circulate around the room, asking as many other participants to answer their question (they will also be asked a question by the person who they are interviewing)

e. After circulating, ask participants to tally their results and see whether their hypothesis was correct.

3. Debrief the activity with participants.

- ✏ Ask people to raise their hand if their hypothesis was proven correct. (Usually about half will have been correct.) Ask them if this surprises them.
- ✏ Ask them what this shows about evaluating up front. (This shows the importance of checking our assumptions. Evaluating up front is important because our guesses are not always right.)
- ✏ Ask if they think it makes a difference who they are asking. What if you asked a group of youth from another city or a group of adults?
- ✏ Emphasize that it makes a difference who is asking and who is being asked. For example, if these same questions were asked at another school, we would probably get different answers, so it is important to have information about the people who will be affected by our project.

4. Close by stating that it is important to collect information to make good decisions. It is important to ask the people who will be affected.

Participant Handout: Ways to Evaluate Along the Way

Evaluation is also something you can do as a day-to-day part of your project. Before you look at whether your project has made a difference, you have to make sure that the way you are using the resources you have makes sense; for example, your time and money. The following four exercises are quick ways for everyone in your group to give input on a question and will help you evaluate things you are doing as a group.

Delta-Plus

After a meeting or activity, have people get into a circle. Let them know that you want to get their feedback about how the meeting or activity went. Make sure they know that any feedback is helpful, as long as it is constructive and stays within the group ground rules. Make sure you have one or two facilitators to keep the conversation going and to make sure everyone has a chance to give feedback. Figure out how much time you can spend on the feedback and give yourself 10 minutes at the end to close the exercise by summarizing the feedback and the suggestions for next time.

Divide a piece of flip chart paper into two columns and put a plus sign at the top of one column and a delta sign on the top of the other column. Ask the group to think about the meeting or activity that just happened and something they liked about it (put these under the plus sign) and something they would change about it for next time (put these under the delta sign). Have them throw out their responses when they think of them or do a go-around to give everyone a chance to give their ideas. This can be a helpful way to get ideas about what went well and what you can improve next time. Be sure to get suggestions about how to improve the things on the delta side.

Stop, Think And Go

Another way to get feedback about a meeting or activity is to draw a traffic light, with a red light, yellow light and a green light. Ask the group to think about what they just experienced and have them reflect on which parts of the meeting or activity need to stop, as they did not work for them (Red Light), need to keep happening, as they liked these parts (Green Light) and which things need to be reworked, sped up, or slowed down (Yellow Light). Once everyone has had a chance to contribute their ideas, make sure you review the list so everyone remembers what they need to do differently to have a better meeting next time.

Head, Heart, Feet

After a meeting or activity, have people get into a circle. Draw a stick person on a piece of flip chart paper and make the head, heart and feet extra big. Ask the group to reflect on the meeting, training or activity they just experienced and think of the following:

HEAD: something they learned, a new idea they heard

HEART: something they felt, how they feel now

FEET: something they are taking away, a commitment they are leaving with

This exercise makes people reflect more and can help you think about how to structure good meetings and activities, based on what the group shares.

It is a good idea to look at the notes from these reflections/discussions before you plan your next meeting or activity to make sure you are using the feedback to do good planning.

Group Writing

Another way to get input is to ask people to write down answers to questions. It is a good idea to make sure that there are opportunities to write down feedback from time to time. Why?

✏ Some people might not feel comfortable sharing their feedback out loud in front of the group.

✏ Some kinds of feedback might be harder to hear in a group setting.

✏ It works to have a change of pace and give people another way to share ideas.

Questions to ask to see how the group is working might include:

- How is the group going for you?
- Do you feel like you have a chance to share your ideas?
- What is the best thing about this group? What would you change?

Questions to ask to see how the facilitation is going might include:

- Overall, how was the facilitation of today's meeting?
- Did the facilitator make sure everyone participated?
- What did they do well? What areas need to be improved?

ACTIVITY: EVALUATING WHEN YOU ARE DONE

Purpose: To help participants think about the kinds of questions that are useful to ask after you have completed a project

Method: brainstorming

Time: 10 minutes

Materials: Flip Chart and markers for facilitator

1. Start by explaining that there are two different things to consider when looking at a project after it's completed. [See the participant reading on page 81 for more explanation and examples].

These two things are:

- ✏ **Process**: what actually happened
- ✏ **Impact**: what impact the project had on people and the community

2. Have participants brainstorm in a group those questions that they could ask that address both Process and Impact.

Here are some suggestions if participants are struggling to generate questions:

- ✏ **Process-type questions**:

  What happened at the event?

  Who came?

  Was this how you planned it or did something different happen?

- ✏ **Impact-type questions**:

  What worked well?

  What did not work so well?

  What did people get out of it?

  What do we need to do differently to make that happen?

3. Conclude by considering as a group how you might collect these two kinds of information.

Give an example (like if your group held an event on the life of Cesar Chavez) and ask how people would get process and impact information. Offer suggestions if necessary.

- ✏ **Process example**: Have sign-in sheets to figure out how many people came to the event
- ✏ **Impact example**: create a survey out whether the event had an impact, you could give people a survey to ask them questions about they knew more about him, whether they were interested in learning about other people that influenced history, or whether they were going to try and find out more about him.

EVALUATING THE IMPACT OF YOUR PROJECT

The previous sections exposed participants to the basics of evaluating projects after their completion, while also introducing the concepts of "process" and "impact" evaluation. **THE PURPOSE OF THIS SECTION** is to introduce a comprehensive process for evaluating the impact of a project. It is organized around "seven steps" for evaluation. In this section are readings that cover the key steps of this process and provide an example of a youth-led group actually going through these steps.

PARTICIPANT READING: SEVEN STEPS FOR EVALUATION

Want to do a really good job evaluating the impact of work? By following these seven steps, your group can do just that!

1. Define your goal, define the question.

✏ What do you really want to learn from the research? What is the purpose of your research/evaluation? Are you asking the right question?

2. Determine how to measure it and what information you will need.

✏ How would you break down the question into different parts that you can analyze? What information will you need to help you answer the question and the smaller questions? Will you need information from public records, from people, from other sources?

3. Design evaluation process and your plan.

✏ What is the best combination of methods to collect the information you need to answer your question? If it is a focus group and a survey, what questions will you ask in the focus group and what questions will be better for the survey? What are your deadlines, who are responsible for what, what resources do you need, and do you need any training to carry out the evaluation process?

4. Collect data, information.

✏ Now that you have your research/evaluation process planned, this step is about doing the interviews, gathering the information, and handing out and collecting the surveys.

5. Analyze & interpret data.

✏ This step is about compiling and calculating all of your totals and figuring out what they mean. How did people respond to the questions? What themes did you find in your observations or people's responses? What do your results mean to you?

6. Develop recommendations and action plan.

✏ Based on your results and interpretation of their meaning, what kinds of recommendations would you make? What kinds of changes would you suggest to address the issues that came up? Who needs to know about your results and recommendations? Depending on your audience, how will you present your results?

7. Review and evaluate the evaluation process.

✏ How did the process go? What worked well? What would you change for next time?

Participant Reading: An Example of the Seven Steps for Evaluation

Making the Grade is a youth-to-youth tutoring program that pairs high school students with middle school students that are struggling with their grades. Last year, a group of high school students started the program after they learned that many middle school students from their neighborhood were close to failing. Some of them could relate because they had struggled themselves and others just wanted to do something to help younger students. Eight high school students tutored 15 middle school students two days a week during the school year.

Below you will find both how "Making the Grade" completed each of the seven steps.

Step One. The purpose and main questions of their evaluation

Making the Grade wanted to learn what was working in their program, what wasn't working, and who was being served. The purpose of their evaluation was to improve the program. They decided to evaluate their program to find answers to these questions:

- What is working and what isn't working?
- Who are the tutors and who is being tutored?

Step Two. How they measured their main questions and the kinds of information they need

Question 1: What is working and what isn't working:

They broke down the program into its parts to make sure they covered everything and got feedback on everything, including:

The room; the vibe; the sessions; the tutors; the food; the level of youth involvement in planning; and the improvement in the grades of those being tutored.

They then listed what information they wanted about these parts of the program.

- The room: is it big enough, too cramped, warm, cold?
- The vibe: is the vibe welcoming, youth-friendly, culturally on point?
- The sessions: are they interesting, boring, challenging, or easy?
- The tutors: are they helpful, friendly, too strict, too lax?
- The food: is there enough food, is it healthy?

- The level of youth involvement in planning: do youth get to plan, do the adults take their ideas seriously, do they get the training they need to do planning and organizing?
- The improvement in the grades of tutorees- do the tutors think the tutorees' grades are improving, do they seem more interested in school and in their classes?

Then they figured out where they can get this information. It is information they need to collect from the tutors and from tutorees.

Question 2: Who are the tutors and who are the tutorees?

They broke the question down like this:

- Gender; Ethnicity; Age; Neighborhood; Grade; First language; Favorite way to spend time

They then listed what information they wanted about who the participants are.

- Gender: are they male, female or do they not want to identify as either?
- Ethnicity: are they African American-Black, Latino/a-Chicano/a, Native American, Asian Pacific Islander, White, Mixed Race, Other Ethnicity?
- Age: 9, 10, 11, 12, 13, 14, 15, 16, 17 or 18 years old?
- Neighborhood: Oakville, Brockton, The Heights, Downtown?
- Grade: 4th, 5th, 6th, 7th, 8th, 9th, 10th, 11th, 12th grade?
- First language: English, Spanish, Mandarin, Cantonese, Vietnamese, Tagalog, Other language?
- Favorite way to spend time: listening to music, reading, hanging out with friends, other?

They figured they would ask the participants for this information.

<u>Step Three.</u> What their process and plan was for the evaluation

Making the Grade youth decided to create a survey and to have a focus group. The survey would give them basic information about what was working and not working and who the participants were. The focus group would give them a chance to get more detailed information about why participants thought certain things were working or not and their ideas for how to improve the program.

They used a table like the one below to keep themselves organized. The TASK is the thing that has to be done. The POINT PERSON is the person that takes the lead and makes sure it gets done. The RESOURCES NEEDED are all of the materials and training the point people need to get their task completed. The DEADLINE is when it needs to be done. The last column is important: it is HOW YOU WILL KNOW that you have completed the task.

TASK	POINT PERSON	RESOURCES NEEDED	DEADLINE	HOW WILL YOU KNOW?
Design survey	Jose & Tamika	1. Training 2. Computer & printer 3. Group ideas & feedback	Sept. 1st	Survey will be done and ready to go out.
Have participants fill out survey	Anna & Mike	1. Copy machine 2. Envelopes 3. Pens 4. Intro rap to explain survey	Oct. 1st	At least 20 surveys will be filled out

Step Four. The Information they collected

Making the Grade youth handed out surveys to participants and told them why they were asking them these questions. They told them to be honest and write down what they really thought. They gave them the surveys during their sessions and collected them into envelopes to protect their confidentiality. They created a tally system to keep track of responses and totaled them up once they had tallied all of the surveys. They used the interesting results from the survey to make questions to explore further in the focus groups. This gave them a chance to get more information from participants about the issues that came up in the survey results. They were not sure if the information they got from the focus groups was the way everyone felt because they had a group of 6 participants (4 tutorees and 2 tutors). They are not sure if they represented the way the whole group felt.

Step Five. How they analyzed and interpreted the data

This is a sample of some of the data collected through the survey:

- *75% of participants reported that they liked the room where tutoring took place.*
- *50% of participants reported that the vibe was comfortable.*
- *75% of tutorees reported that the tutors helped them to do better in school.*
- *50% of tutors reported that youth were involved in the planning of the sessions.*

Youth thought that it was interesting that just half of youth said the vibe was comfortable. They also thought it was interesting that half felt they were involved with the planning, as they thought more would report involvement. They were pleased to see that most felt the program was helping them do better in school.

The youth decided to focus on these three areas in the focus group to figure out why youth answered the survey this way. They wanted to know more about the vibe, about youth involvement in planning and about how it was helping younger students in school. They asked youth lots of probing questions in these areas in a focus group. They practiced facilitating meetings to prepare to lead the focus group and had two youth co-facilitate the focus group. Here is what they found:

- Youth reported that the vibe was comfortable because the tutors looked like them and spoke to them in the language that they spoke. Youth who said they didn't feel as comfortable were youth that did not see themselves or their culture represented in the tutors.
- Youth reported that they wanted to be more involved with the planning. While a couple of the tutors help with planning, these opportunities are not offered to all tutors. They felt that all tutors should be able to contribute.
- Youth said that the program helped them do better in school. At first, the youth thought this meant that their grades had improved, but through the focus groups they learned that youth felt their grades go up, but they also felt like they had more friends and more confidence, which helped them do better in school and feel better about school. The focus group helped them see the other reasons youth said the program helped them in school. The reason they felt it helped was knowing that their tutor cared about them.

Interpretation: Youth felt that these results meant that the program was going well in the areas of improving grades and school experience and that the vibe and youth involvement in planning could be better. Overall the program is working well, but there are some areas for improvement.

<u>Step Six.</u> The recommendations and action plan they developed

Here are the recommendations created by the youth:

- Tutors need to come from the same backgrounds as the tutorees so they feel comfortable at the sessions. Staff needs to make sure that the tutors they recruit reflect the students.
- Tutors and tutorees need to be more involved in program planning and decision-making. Staff could create a youth council or board to take on this responsibility.
- Tutors should continue building relationships with their tutoree because these relationships are helping them do better and feel better about school.

Audience for the results:

- The program participants
- The program staff
- The school principals
- The school teachers
- The school counselors

<u>Step Seven.</u> What they thought of their evaluation process.

Youth discussed the process of completing their evaluation project and came up with the following ideas:

- Next time, allow more time for youth to complete surveys. They were rushed.
- Next time, take more time to practice facilitating focus groups. It was harder than expected to facilitate a group discussion.
- Next time, involve more youth in the focus group or hold two to get more feedback from more viewpoints.

SOME IMPORTANT DEFINITIONS

Adult Ally: A person 24 years or older who acts as a paid or volunteer advisor, supporter, or guide to young people.

Donor: Another way to describe the person who is the given (as opposed to the recipient) of the funds.

Facilitator: The term used in the curriculum to identify the leader of each activity.

Foundation. A not-for-profit organization who exists to provide grants to other not-for-profit organizations for works that benefit society and community. Foundations generally keep their money in the bank, and use the yearly interest for grants. Community Foundations, a special kind of foundation, are constantly raising funds from community members and businesses in order to give the money back to community non-profits.

Grant: A term for an amount of money that not-for-profit groups receive that help to pay for projects and programs they want to carry out.

Grantseeker: The person or group who is asking for the grant from the funding source.

Participant: the individuals who are the targets of the trainings in this toolkit.

Philanthropy: The act of giving money, time or talents to improve society or the community.

Young person: Person who is 12-23 years of age

Youth Development: The ongoing process in which young people are engaged and invested in building the skills, attitudes, knowledge, and experiences that prepare them for the present and the future (Pittman & Irby, 1998).