creative volunteering no limits

A Regional Arts Australia Initiative
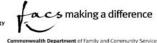
REGIONAL arts AUSTRALIA

Department of Communications Information Technology and the Arts

facs making a difference
Commonwealth Department of Family and Community Services

Acknowledgments

Regional Arts Australia acknowledges the following people and organisations that have assisted in the development of this project.

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Foreword

Creative volunteering

We are pleased to welcome you to the Creative Volunteering Project.

This project, jointly funded by the Department of Family and Community Services (FaCS) and the Department of Communications, Information Technology and the Arts, has been two years in the making.

Regional Arts Australia have administered this project, which will offer six one-day workshops in over 60 locations across regional Australia. The workshops will reach up to 15,000 of the cultural volunteers who keep our regional museums and galleries open, help our regional theatre companies reach opening night and organise our rich and diverse regional festivals.

Volunteerism has always been a cherished Australian quality, a quality that has helped build the communities that are home to the one in three Australians who live outside the metropolitan areas.

In times of crisis, volunteers have kept the bush fire brigades going and the tea urns boiling. In times of plenty and prosperity volunteers have helped make our regions as culturally sophisticated and engaging as our cities.

We are pleased to be able to offer something back to these communities in the form of specialised training in order to extract maximum benefit from the efforts of regional volunteer.

The workshops offered under the Creative Volunteering project address needs identified by volunteers themselves—collections management, business planning, networking, marketing, planning and programming events, and funding and sponsorship.

This program is tailored to meet the needs the regions have identified as most urgent. It will deliver the skills and expertise that will help regional Australia preserve its past, engage with the present and imagine the future

The Government has been pleased to work with Regional Arts Australia on this important project.

We look forward to seeing a new professionalism and confidence among regional volunteers as they take advantage of the opportunity to hone their skills and apply new strategies to their institutions.

Senator the Hon. Rod Kemp
Minister for the Arts

Senator the Hon. Amanda Vanstone.
Minister for Family and Community Services

Foreword

Regional Arts Australia

Regional Arts Australia is proud to support sustainable, industry relevant training and professional development across regional Australia.

Regional Arts Australia is a peak national organisation for the ongoing development of the arts across regional Australia. Regional Arts Australia advocates at a local, state and federal level to ensure that the arts across regional Australia are appropriately recognised and resourced. In early 2001, Regional Arts Australia gained national funding support from the Commonwealth Government to develop and deliver skills based workshops to regionally based volunteers across Australia.

Regional Arts Australia recognises that communities throughout Australia depend on volunteers to keep huge numbers of organisations and activities afloat. This is particularly so in the case of the arts, cultural heritage and museums which are mostly managed and run by volunteers, enriching both the communities in which they live and work, and in fact, the whole of Australia. Well over a third of all people living in the regions are volunteering their time and expertise in some way for the benefit of their communities.

This workbook is one of six that has been produced as part of a **Course in Creative Volunteering**. Consultation with interested parties, including most notably Museums Australia, has contributed to the development of this nationally recognised course, now available to regionally based volunteers across Australia.

The course comprises six one day workshops which have been designed to increase the recognition and skill base of volunteers. In this present day environment of increasingly complex negotiations and arrangements, volunteers can increase their knowledge and skills about:
- Planning for business development
- Marketing planning to help to build markets in the regions.
- Establishing and maintaining networks within and across communities.
- Funding and resources for the operation of programs and activities.
- Planning and programming local events.
- Working with collections.

The support of the Commonwealth Government has made it possible for us to deliver to regional Australia the right tools for training to help volunteers gain valuable skills in carrying out their work, and importantly, to have these skills recognised.

On behalf of Regional Arts Australia I am sure that the many volunteers working across regional Australia will find this workbook a valuable resource for themselves and their organisations.

Have fun at the workshops and enjoy sharing the knowledge to secure a sustainable and viable future for arts and culture.

Nicola Downer
President, Regional Arts Australia

Overview of the workbook….

This workbook is part of the series of workbooks that form the *Creative Volunteering Program.* The workbook is designed to be used at the workshops, and later, will act as a resource tool for you and your organisation. The workbook contains exercises that will assist your learning. The features of the workbook are explained below.

How to use this workbook

The topics in this workbook are arranged in a logical sequence so that your understanding is gradually developed. Read the topics and think about how the points raised relate to your own experience.

A case study is provided for you to refer to as you go through the topics. The case study is introduced in the first topic, and is developed following throughout the workbook so that you have a concrete example to work with.

Your facilitator will take you through each section step by step, discussing the case study and then inviting you to complete the exercises at the back of the book.

Work at your own pace

The workbook has been designed for you to work at your own pace. If you do not have all the information to finish an exercise during the workshop, attempt part of it and then move on to the next topic with the group. You can fill in the blank sections when you return to your organisation and you are able to find the information. **Activities** may be carried out in the class and are also suggested as things you might follow up outside the workshop.

Exercises

These exercises are important for recording your progress as you study, and can be used to demonstrate your understanding of the topics. At the end of the workbook is a section to record your exercise responses.

If you are seeking a formal assessment of this module you will need to make sure that the specified exercises at the back of the workbook are signed and dated by the facilitator of the program. (For more information, see the *Pathways to Formal Qualification* section at the end of this workbook.)

Find out more…

At the back of the workbook is a list of other places – websites and other resources – where you might find out more information. Use this list to start your research if you want to find out more about the topic that you are studying.

Guidelines for learning

The workshop space

The workshop space is a safe learning environment that is structured to allow you to experiment, ask questions, make mistakes and be proud of your achievements. Don't be afraid to ask if you don't understand. A workshop is non-competitive and participants are encouraged to support each other. Everything you need to know will be explained to you.

Flexible learning

It is important that you are able to understand, record and retain information during the workshop. If you need to work in an alternative way, you must let the facilitator know so that you can be supported to do so. For instance, if you need things to be read to you, then you could be paired with another learner who can do this with you. This will remain confidential.

Privacy protection

Workshop opportunities will allow you to share information and ideas with other volunteers from your area. This local area knowledge is especially useful when it comes to Networking within Communities. Sharing information is an act of trust, and requires everyone to agree that what you share for the purposes of learning, will not be used out of context or divulged to others who were not at the workshops. Please respect each others commitment to sharing.

Evaluation

At the end of today's workshop you will be asked to fill out an evaluation form on the workshop. The information on the form will remain anonymous. Care will be taken to ensure that the information on the forms remains confidential and that individual responses cannot be personally identified. Your views on the workshops will help us to make sure that the project is meeting its goals.

Skills audit

Each of you has valuable skills and knowledge gained throughout life that can be used for the benefit of your organisation. This is what you bring with you to the workshop. Often people are unaware that the skills gained throughout their lifetime, either at work or in the home, may be of value to their organisation. For example, organising the family budget teaches invaluable budgeting skills.

This exercise is to assist you to list the skills you can offer your organisation. Write down everything you can think of, regardless of whether you think it is relevant.

What are your current interests? eg movies, gardening, internet, quilting

Can you organise tasks and set priorities? eg family budget, crop rotation

What skills do you have? eg great with children, carpentry, cooking, storytelling

What equipment can you operate? eg computer, typewriter, calculator, fax

What office skills do you have? eg keyboarding, filing, book-keeping, calculating

What are you really good at?

List any training/courses you would like to undertake:

Topic 1: Determining resource and funding needs

If you have participated in the business planning module of this workshop series, you have already considered the importance of planning. Some of the benefits of planning are summarised here.

Strategic planning guides the organisation to:
- articulate its mission and the values that guide its activities;
- identify strengths as well as areas that need improvement;
- determine its goals; and
- plan strategies and activities to achieve these goals.

Financial planning ensures that you can meet the expenses associated with the on-going operation of your organisation and also undertake projects such as purchasing assets or staging events.

Contracts, risk management and occupational health & safety are **legal issues** that require planning activities to ensure your organisation operates in a safe, fair and diligent manner.

Resourcing

As with any undertaking, planning is also an essential first step in obtaining the resources necessary for the operation and activities of your organisation. Funding $$ are a scarce resource and there is fierce competition for them, so a planned and broad-ranging approach to resourcing is essential. In this topic we will look at where to start when developing a resourcing plan.

The first step in developing your resourcing and funding 'road map' is a careful assessment of your organisation's operational priorities and community needs.

Case Study

In this workbook we use a hypothetical case study to help you work through the exercises.

Case study

Culture Club is a co-operative of local artists in a large regional centre. They came together with the aim of encouraging cultural activities in the community generally, as well as providing exposure for both established and emerging artists.

They have secured an initial small grant from the district council and further short-term support through subsidised rent for twelve months on an old church hall. They also have access to an adjoining community centre at a reasonable cost for events.

They have established a large studio space and equipped it, largely from their own supplies; and are hoping to attract members of the community to participate in short workshops and make use of the facilities. A new gallery space to exhibit work has also been built in the adjoining community centre; it has been open for a few months and is slowly building an audience.

The co-op members have now decided to stage a special event to launch the community studio and gallery properly.

They originally considered a children's art competition, inviting work from the local school to be exhibited in the gallery. After discussing this idea with the principal of the school and a community development worker from the council they have decided to extend their original plan and undertake a community arts project.

Determine skills & resources required

Before launching into the world of donations, grants and sponsorship it is essential to understand:

- **where you want to go** (objectives)
- **what is required to get there** (resources)

It is important that the **organisation's vision** determines the development of your objectives, and the strategies and activities you will undertake to get there.

What activities are you undertaking?

From your business plan, draft a list of activities for which you will need resources. Consider the ongoing operational activities as well as your program of events or special activities.

What skills & resources do you need?

The next step is to identify what you need in order to carry out these activities. This will include physical resources, professional services, and human resources.

Remember, resourcing is not just about $$. Operating your organisation also requires certain expertise. Think about the people and skills that are needed as well as materials and equipment.

Valuing your own contribution

Include everything in your list, especially the skills and resources your organisation and its volunteer members already bring to the project. It is essential that you identify and value these –recognising all contributions helps the personal development of individuals involved and contributes to a greater sense of ownership by the community.

Case study

The Culture Club team participated in a business planning day and identified these activities to be undertaken over the next six months.

Operation of organisation
- Business management (finances, administration etc.)
- Managing/coordinating volunteers
- Funding and sponsorship development
- Networking

Community arts project
- Consultations with the community
- Concept development
- Workshops with students & teachers
- Producing work

Exhibition
- Promotion
- Set-up/hang works
- Exhibition opening

Evidence of support

More tangibly, funding bodies and sponsors will usually only fund a proportion of the costs for a project; providing evidence of other contributions and community support increase your credibility and the likelihood of your funding proposal being successful.

Case study

A breakdown of the activities identified what skills & resources were needed.

Business operation of organisation (on-going)		
Activity	*Human resources or skills required*	*Physical resources required*
Business management (finances, administration)	accounting report writing	computer & printer office space
Managing/coordinating volunteers	people management recruitment	
Funding and sponsorship development	grant and sponsorship writing public speaking	printing/stationery supplies slides
Networking		business cards

Community arts project		
Activity	*Human resources or skills required*	*Physical resources required*
Consultations with the community	group facilitation interviewing research skills	computer & stationery
Concept development	group facilitation design skills presentation skills	art supplies
Workshops with students & teachers	tutors community artsworkers	studio space benches & stools art supplies framing resources

Exhibition		
Activity	*Human resources or skills required*	*Physical resources required*
Promotion	marketing knowledge ability to write copy design skills	printing of pamphlets distribution (postage) advertisements in paper
Set-up	experienced curator	rails lighting
Exhibition opening	front of house	printing of catalogue wine & catering

Work on this exercise with your group.

Exercise 1a Skills and resources needed

Choose one project or event from your program
and identify the skills and resources you will
need to carry out the project.

Organisational capacity audit

The next step is to identify your organisation's ability to provide (or access) the skills and physical resources that are required. A **capacity audit** will look at the organisation's assets (and liabilities), and will also consider the effect that the political environment and other external factors can have on its operations. It is a type of SWOT analysis - you need to consider the **strengths** and **weaknesses** of the organisation; and identify the **opportunities** and **threats** from outside of your organisation and control that may have an impact on you.

Case study
Culture Club's capacity audit identified these **assets (strengths)** of the organisation.

People (includes financial members, active volunteers, board of management)	*current skills and expertise* ability to curate an exhibition money handling and record keeping marketing knowledge combined skills in several artforms
Reputation or track record	individual artists well respected community support listed on district council's web-site
Buildings	long-term lease on old church hall good access to community centre
Equipment	trestle tables art supplies computer
Funds in bank	$3000

Liabilities (weaknesses)

It is also useful to consider areas where your organisation doesn't have the necessary expertise and resources, or is affected by other internal factors that can limit its effectiveness.

For example, a group whose members are all retired and is not attracting new, younger members and volunteers may eventually struggle to maintain an active program. Or perhaps the promotion for your last event wasn't very effective.

Strategies to address liabilities could include:

- Membership drive
- Training (eg, marketing or business planning skills)

There will be resource needs to implement these strategies. You may need to revisit your list of resources required and include any extra requirements in your plan.

Case study

The members of the co-op identified that a lack of knowledge or experience in writing grant applications was a liability.

Through a contact, they found out about the Community Arts Network (CAN). As a member of CAN they could have a free consultation with an experienced community arts practitioner, who could assist them with writing a grant application.

They also decided to participate in a funding workshop as soon as possible; and have made inquiries into establishing an informal mentoring relationship with the local regional arts officer.

The costs for these strategies are minimal –$65 for annual membership of CAN and $25 per person for the funding workshop.

External factors (opportunities and threats)

You also need to consider the external environment. Factors such as government policy, community attitudes and economic factors may affect your organisation.

Government policy & funding guidelines

Funding guidelines can be more favourable or less so, depending on government priorities and the specific goals of your organisation.

For example, with the South Australian government's current focus on social inclusion, a program or organisation that increases access to cultural activities for people who are isolated in the community, is more likely to receive a favourable response to their funding bid.

A focus on volunteering during the Year of the Volunteer, provided a favourable environment to pursue funding to develop and deliver the **Creative Volunteering** workshop program.

Community attitudes, economic and other factors

The effects from world events and economic trends can be felt at the local level. Large corporations may down-size or close some branch offices in times of economic recession, which will undoubtedly affect the economic health of the community generally and may also limit your resourcing options.

Can you influence this?

Many external factors may be far outside your influence. In these situations, it is important to conduct a risk assessment to discover how vulnerable your organisation is and decide what strategies you can put in place to minimise any negative effect on you organisation.

It is not recommended that you allow government funding priorities to dictate the strategic directions that you organisation will take. However, it is worthwhile to network widely and find out where funding programs may match some of your objectives.

There are some areas where you feel you may be able to influence events. For example, you may decide to become a member of a peak body for your sector that advocates for changes in government policy and increased funding or more flexible criteria. Or you may lobby your local member of parliament directly.

What resources are needed?

There may be some resources needed to achieve these actions - for example, membership fees. Remember to include this in your plan.

Exercise 1b Organisational capacity

List as many assets of your organisation that you can think of. Include physical resources, funds and of course the people involved.

Identify any liabilities that the organisation may have and suggest potential strategies to address them.

Resourcing needs

By matching the skills and resources required for your program with the audit of your organisation's assets and liabilities, you can determine your resourcing needs.

Case study

Community arts project

Activity	*Resources and skills required*	*Organisational capacity*
Consultations with the community	group facilitation interviewing research skills computer & stationery	Culture Club can provide use of a computer and meet basic stationery needs
Concept development	group facilitation design skills presentation skills art supplies	co-op artsworkers can undertake design work
Workshops with students & teachers	tutors community artsworkers studio space benches & stools art supplies framing resources	two members of the co-op are experienced community artsworkers Culture Club can provide the venue and major equipment

Culture Club were able to identify the following resourcing needs for this part of the project:

- group facilitation skills
- interviewing skills
- research skills
- presentation skills

- art supplies
- framing resources

Exercise 1c   Resourcing needs

Determine your resourcing needs by matching the skills and resources required for your program - that you identified in Exercise 1(a) - with the audit of your organisation's assets and liabilities from Exercise 1(b).

Topic 2: Researching options

Once you have worked out what your organisation needs, the next step is to identify potential sources of money, resources and expertise.

Sources of support

There are a number of directions you can take when seeking support:

- Grants from local councils, state or federal government
- Grants from philanthropic organisations
- Corporate sponsorship or donations
- Community donations or in-kind support
- Sharing resources
- Income from retail sales or entrance fees
- Fund-raising events

Each of these sources has different characteristics – different interests and criteria. It is important to do your homework and find out as much as possible about the various options available.

Information to find out includes:

- *Scope & recipients*
  What support is offered? Who is usually supported? Does the sponsor or government department target specific sectors or community groups?

- *Purpose*
  Why is support given? What are the criteria? What benefits will the sponsor or government department get from the arrangement?

- *Timing & frequency*

  Are there specific times to apply for support? Most government grants are offered at set times of the year, often with a long lead time.

  When is the best time to approach a corporate sponsor? When is most convenient for them?

Government grants

All levels of government provide grants that can be accessed by community groups. Government grants are usually organised into categories. They are often targeted at certain groups and have very specific criteria. Funding programs can also change frequently, usually because of political activity and changing priorities. The following lists a few departments that currently have arts/cultural funding programs:

Federal Government

- The Australia Council for the Arts
- The Department of Communications, Information Technology and the Arts
- The Department of Employment, Workplace Relations and Small Business - Regional Assistance Program
- The Department of Industry, Science and Resources – Regional Tourism Program
- The Department of Environment

Case study

Culture Club successfully applied for a community development grant from the district council to initially establish the community workshop centre.

They have also identified a Community Education grant to subsidise the workshops;

and they have decided to apply for a state government grant under the Cultural Facilities and Equipment Program to purchase and install lights and rails in the gallery space.

State and Territory Government

Most state and territory governments now have departments specifically for the arts and heritage. They each have their own priorities and funding programs and the level of support for arts, heritage and community development varies from state to state.

Local Government

Local government authorities in most areas of Australia are recognising the need to support cultural activities in the community – as well as roads, rates and rubbish. Activities that encourage community participation, promote tourism or increase economic activity in the region are most likely to be supported.

Non-arts/cultural funding

When you consider government funding, think broadly. All government departments, at any level (federal, state and local), that have an interest in community or human services are also potential sources of funding. Non-arts grant programs, which are relevant, can be very useful alternative or supplementary sources of funding.

For example, a theatre project that involves youth may attract funding from the Department of Family and Community Services, and an exhibition of visual art by people from different cultural backgrounds could find support from the Department of Immigration and Multicultural Affairs.

Types of grants

Government support can range from on-going funding for annual operations to one-off grants for specific projects.

Operational grants

Some limited funding is available to support the general running costs of arts and cultural organisations operating in the community. Organisations need to demonstrate sound business performance and a good track record in creating and managing cultural programs, as well as meeting broad government policy objectives.

Project grants

Funds are available for projects across a broad range of cultural activities. Community festivals, theatre productions, exhibitions, museums and heritage interpretation projects and many, many other activities are funded regularly.

Development grants

There are several types of development grants offered by various government bodies that focus on different areas.

- Arts Industry Development grants support organisations and projects that contribute to the arts industry and increase opportunities for artsworkers;

- Regional Development grants fund initiatives that improve economic activity or promote tourism in a region. Some interpretation centres and museums have obtained funds through this source.

- Community Development grants seek to increase participation and develop skills in the community.

- Heritage places can obtain funds for repairs and restoration through the state heritage agencies.

What's the catch?

All those grants available –problems solved! Well, not quite.

There is fierce competition for funding. Many other organisations will also be seeking support. Writing grant applications can take a lot of time and you need good writing skills.

The criteria for grants can be limiting. Your application needs to fit the priorities of the funding body. Organisations need to be very careful that they don't get distracted from their main objectives.

Grants are generally offered at set times and may not fit in with your schedule. Government grants also usually require a long lead time, so good advance planning is essential.

You will need to acquit government grants. This means planning and undertaking an evaluation and writing a detailed report.

How do you find out what is available?

There are many ways that you can find out what grants are available.

- The internet is a great starting place. A very useful site which gives you access to a database of detailed information about grants is grantsearch Australia - www.grantsearch.com

- Contact relevant government departments and ask for grants information handbooks or look at their websites.

- Visit your local council. Speak to officers who work in the arts, cultural development, community development, heritage or recreation sections depending on the activities you have in mind.

- Ask people who are involved in similar organisations what grants they know about.

Philanthropic Organisations

Grants from philanthropic organisations are managed in much the same way as the government funding system. Philanthropic organisations provide grants usually for specific groups and often only for certain expenditures.

Philanthropy Australia is the national Association which represents Australia's leading grantmaking Private, Family and Corporate Trusts and Foundations. They publish a guide that provides information relating to grants – where to go and how to apply. They also have a website - www.philanthropy.org.au

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Exercise 2a   Grants

List two government funding bodies relevant to your organisation's core interests that you know about who can provide grants that match your program.

Identify at least one non-arts government funding source.

Sponsorship

Sponsorship can provide your organisation with the support you need. Unlike the grants system, sponsorship is not tied to specific programs with criteria that need to be addressed. Sponsorship is usually a reciprocal arrangement – the sponsor will expect some benefit in return. For example, this may be an enhanced public image or raising the sponsor's profile in the market.

Sponsorship can range from high profile corporate sponsors to local community support. Obtaining sponsorship is an on-going, difficult task. You need to make sure you know as much as possible about potential sponsors, because you will have to demonstrate how their support of you will benefit them.

> ## Case study
>
> Culture Club are hoping to find a corporate sponsor to provide the funds to pay for the community artist and workshop tutors. They have approached two organisations – a paper mill and the branch office of a large fish packing business.
>
> An equipment hire business and a hardware store both provided in-kind support to renovate and prepare the gallery space.
>
> In-kind support received from a winery has ensured a well-attended exhibition opening!

Some general benefits you can offer to sponsors

- Prominent acknowledgement (with logo) in posters, programs, leaflets, newsletters, brochures, media advertising, catalogues, letterhead, annual report
- Signs or banners at the venue
- Free or concession arrangements to events for the sponsor
- The right to market or promote products associated with your organisation

Adapted from Australia Council pamphlet *Pocket Checklist: Fundraising in the Arts*

Activity

What benefits can your organisation provide to a sponsor? Can you add to this list? With your group, think about your organisation and its activities – what do you do that will be attractive to a sponsor? Consider it from the sponsor's point of view.

Types of sponsorship

Large corporate sponsors based in the capital cities are most likely to support a few high profile events or organisations, rather than numerous smaller regional events. Unless your project is part of a larger program, or has some feature that makes it attractive, you will most probably find that approaching sponsors within your local community will be more successful.

Large corporate sponsors are certainly still an option for small organisations, but you are more likely to succeed if you approach the local branch office in the first instance.

Community sponsors

There are many advantages to seeking sponsorship support from local businesses and service organisations.

- You are more likely to have better networks in your local area; and you will be more confident and successful approaching people you know.

- Local businesses will see the benefits in their name being associated with a local event or project.

- Most service clubs like Rotary or Lions are committed to supporting local initiatives - they just need you to show them how.

- Perhaps one of the most important benefit to involving local businesses and clubs is that it helps build your community.

- Many funding bodies like to see substantial community involvement in a project, when assessing a grant application. This will demonstrate the value of the project to that community.

In-kind support

Community sponsors may provide cash support, but you can also ask for in-kind assistance.

- The local newspaper and radio station may be prepared to provide free advertising as well as publicity to help raise your organisation's profile or promote an event.

- A local lawyer could help with contracts, or the local accountant may assist you to prepare budgets and provide audited statements.

- A winery in the region may supply wine for an exhibition opening.

Exercise 2b Community sponsors

Think about your community and list businesses or clubs that could be potential sponsors. What support could they offer?

Ethical sponsorship

When you look at industry and business for potential sponsors, it is important to keep your organisation and its values in mind. Make sure their products or services are acceptable to your members and in keeping with your organisation's mission. You do not want to enter into an arrangement that involves a conflict. For example, it wouldn't be a good idea to accept alcohol related sponsorship if the project or event involved young people.

Other resourcing solutions

There are several other resourcing solutions available to organisations.

Individual sponsors or patrons

Does your organisation have a Friends group? Are there people in the local area who you could approach to become patrons?

Sharing resources with other groups

Networking not only keeps you in touch with the community and up to date on the news. You can also arrange with your contacts to share resources. Trestle tables, a public address system, display boards and numerous other resources can be shared by several organisations.

You could purchase equipment jointly with another group; or you could work out contra deals, trading use of your resources for access to theirs. What do you have that you could share?

Fundraising activities – raffles, social events...

Auctions, raffles and quiz nights are reliable fund raising strategies.

Merchandise sales and entrance fees

- box office receipts
- sale of refreshments
- postcards, books

Case study

The Culture Club artsworkers will work closely with the teachers from the school throughout the project. During the consultation phase especially, the teachers will work with the students to interview people in the community and collect stories and ideas. The project will involve several curriculum areas and is well supported by the school. The art teacher will also be involved with the cartooning workshops.

The local paper has promised to support the project with articles and photos.

The school will hold a quiz night to raise money and maintain interest in the project.

Exercise 2c Other resourcing solutions

List other ideas for accessing resources. What can you share? What social fund-raising does your organisation undertake? Do you charge entrance fees?

Resourcing plan

By matching your potential sources of support to your list of resources needed you can develop a resource plan.

Case study

Resourcing needs	Sources of support
interviewing skills	The school have volunteered to be responsible for researching stories in the community.
research skills	The students will undertake this part of the project as part of their formal studies.
	They will document their findings – as source material for the catalogue and displays in the exhibition space.
	The local library will keep their findings in the local history section as a resource for future projects.
art supplies	Co-op members will approach all retailers of art supplies in the town for in-kind support.
community artsworkers	They will apply for funding from the state department for the arts to pay for the artsworkers.

Exercise 3 Resourcing Plan

Develop a resource plan by matching your list of resource options to the list of resources needed that you developed in Exercise 1 (c): Resource needs.

Topic 3: Applications & proposals

You have worked out what skills and resources your organisation requires, and you have researched possible sources for the support you need. Now it is time to ask for it.

In this part of the workshop we will identify what is needed to put together a successful grant application or sponsorship proposal. We won't have time to prepare a full proposal, but we will identify the basic blocks that you will need.

Preparation

Whether you are applying for a grant from your state government or approaching local traders for support, there is some basic information you must put together.

Your organisation

- Describe your organisation and its role in your community. It is very useful to have a clearly defined vision for your organisation and a strategic plan that outlines your goals or objectives. (Some examples of visions and strategic goals can be seen on the Regional Arts website – www.regionalarts.com.au)
- Briefly describe your organisation's history. This will demonstrate your track record.

The project or event

- Develop a statement that outlines the basic facts about your project or event. Demonstrate how this fits in with your organisation's vision.
- It is also important to define the benefits of the program to your organisation, any special groups involved, and to the wider community. It is most useful if the benefits you describe are measurable – this is very important when it comes time to evaluation your program.
- Prepare a timeline or schedule for the project.

The people

- Describe the people who will be involved. Show evidence of their expertise and skills. For example, a description of the skills and experience of your key people in project management or curating an exhibition will inspire confidence that you can responsibly and successfully carry out your plan. This will strengthen your application.

The finances

- You have already identified the resources needed. From this you can put together a detailed budget. As mentioned before, it is important to show in-kind support. This demonstrates community support and increases a sense of partnership, rather than charity.

- If you're not sure how to put figures against in kind support, check with somebody who is likely to know eg. Community Arts Network, National Trust head office, Museums Australia local branch or local council officer.

A case statement

This information will serve a range of various fund-raising approaches. A clear case statement can form the basis of a formal application, a proposal to a large corporation, a letter to local traders and parts of it will even help with promotion and publicity activities.

Exercise 4a   Case statement

Construct a case statement.

Briefly describe your organisation.
        your vision and objectives
        your main activities
        a brief history, or track record

Describe the project or event.
        the basic facts – what you want to do
        the benefits or outcomes of the project – to the people involved, your
    organisation, the sector, your community or region

Writing grant applications

As stated earlier, funding priorities and guidelines change regularly. It is important to obtain up-to-date information. Most government funding bodies issue a new handbook each year that outlines new guidelines and application forms.
Read the guidelines from the funding body very carefully.
The information you need will most probably be in several different sections.

General requirements
The general requirements section generally provides an overview of basic information that applies to all grants that the funding body offers.

Application and assessment procedures
These detail the how and when of the application and decision making process. It gives an idea of who will be making the decision about the application, when decisions will be made, and how and when applicants will be notified.

Eligibility
Government granting bodies generally have a policy of assisting non-profit incorporated organisations, although there may be specific exceptions. It is important to check eligibility criteria before proceeding.

Acquittal procedures
These outline what kind of reporting the funding body expects, if the application is successful. Although it may be a long time before the reporting process, it is important to read this information because it can help tell you what is important to the funding body.
It also helps to know what your responsibilities are, so that you can set up appropriate financial processes and accurate record-keeping systems. These will need resources and so will be important when you prepare your resource plan and budget.

Public acknowledgement
Funding bodies require the applicant to acknowledge the source of funding on projects and activities which have been undertaken as a result of a grant. For example, this may mean applying a logo to publicity material or installing a sign in the museum near the relevant display. Funding bodies want to be sure that when they provide assistance it will be publicly recognised and valued.

Adapted from *Museum Methods*, Museums Australia Inc (NSW)

Descriptions of grants

This information provides details about the specific goals, criteria, eligibility and types of assistance available. This is where you should check to ensure that your funding proposal fits the guidelines and priorities.

You will also find information about funding limits, how much assistance can be provided.

Usually contact details for the relevant Project Officer will also be provided. **Do make contact with this person.** It is their job to help you with information and support. They can help you target the most appropriate grants program and save you time and energy.

Activity

Following and on the next page is the description of one of the grants offered by Arts SA, the South Australian government's department for the arts.

With your group, read it through carefully and highlight the information it contains that will be useful when preparing an application.

New Audiences Program

The New Audiences Program, an initiative of Arts+ 2000-2005, will support one-off projects designed to bring new audiences to the arts and take art to new audiences.
The program began operation on 1 January 2001 and replaces Arts SA's Business Consultancies Program.

The aim of the program
The New Audiences Program will support projects across all artforms and in all parts of the State. Projects will be designed to encourage, extend and enhance audience or market development by testing the effectiveness of various innovative approaches. The program will also provide support for projects that build on experience. For example, strategic assistance could be provided for an initiative that has worked well and offers broader benefits if implemented by another or a number of other arts organisations. Partnerships between the arts and the private sector are particularly encouraged.

Primarily the program aims to create more opportunities for more people to access the arts; address the barriers to engagement with the arts; and encourage a stronger, richer relationship between the artist and the public.

The New Audiences Program will give priority to one-off projects that:
- develop or promote new strategies for families
- explore the presentation of arts product at times to suit audiences' current leisure patterns
- develop strategies and packages that cooperatively market products of a number of arts organisations to increase and broaden the audience base of each.

Other outstanding initiatives will also be considered.

Who can apply?

The New Audiences Program is open to lead agencies, Industry Development organisations and South Australian Youth Arts Board funded youth companies, as well as marketing-specific organisations and producer/presenters who work in collaboration with artists and/or arts organisations.

When can I apply and what is assistance provided for?

While there is no deadline or application form for the New Audiences Program, Arts SA may, from time to time, call for tenders for the delivery of specific activities. Proposals will be considered all year round.

How much assistance can be applied for?

The New Audiences Program can provide funding of up to $20,000 per application.

How do I apply for assistance from the New Audiences Program?

If you have an idea for reaching new audiences, contact Manager, Industry Development to discuss your proposal. It is hoped that this process will facilitate the full development of your proposal in line with the program's priorities, and will help ensure that your idea has the best chance of gaining assistance.

Assessment criteria

New Audiences funding will be directed at initiatives that best meet the following criteria:

> expected audience development outcome
> calibre of monitoring and evaluation mechanisms
> quality of arts activity and the appropriateness to the target audience
> degree to which the activity provides information about new audiences that can be widely shared or adopted
> demonstrated ability to sustain the initiative after the trial and to service the audiences attracted
> effectiveness of New Audiences funding in relation to audience benefit.

Please contact Manager, Industry Development for further details about the New Audiences Program.

Downloaded from Industry Development Programs www.arts.sa.gov.au

Application forms

The next step is to obtain the actual application form.

The questions on the form gather information for the funding body to assess your application, and you will also need to provide administrative information. You may also find additional criteria tucked away in here.

Administrative information

Administrative information can include contact details and information about your organisation, such as evidence of your organisation's incorporated status, your strategic plan, annual reports etc.

It is useful to assemble a pack of relevant documents. Make several copies of everything – this will help save time as the application deadline looms.

Activity

What documents and information can you put together that will show your organisation's standing and track record? Check against this list. Can you think of any other useful evidence to support your application?

- ❑ certificate of incorporation
- ❑ constitution
- ❑ mission statement
- ❑ strategic plan
- ❑ policies and procedures
- ❑ list of board members
- ❑ newsletters and press clippings
- ❑ annual reports
- ❑ audited financial statements
- ❑ .. other………………………….
- ❑ .. other………………………..

Project information

Funding dollars are scare so it is important that your application is persuasive, if you are to be successful.

When writing a description of your project, be clear and concise. Don't put in too much unnecessary information – it will only distract the panel assessing your application. However, do make sure you provide all information that is requested. This is where the case statement you constructed earlier is useful.

PROJECT INFORMATION

Be sure to address the following:

Meeting the priorities

Acknowledge the stated objectives of the grant program and indicate how the project meets these priorities

Benefit

Discuss who will benefit from the grant with an emphasis on the audience and the community generally, as well as your organisation

Need

Indicate how the project will assist your organisation to meet its longer term goals

Responsible management

Demonstrate that the project will be managed well. Provide a resume of the person who will undertake or supervise that project and indicate what relevant experience they have in the area. Cite other projects successfully completed by your organisation on budget and on time.

Budget

Prepare the budget thoughtfully, and with as much detail as possible.

Adapted from *Museum Methods*, Museums Australia Inc (NSW)

Evaluation Plan

Most grants also require some kind of evaluation process. Although you will write your final report at the end of the project, it is important to establish your criteria for a successful project at the beginning.

Outcomes & performance indicators

Many funding bodies want you to clearly outline the expected outcomes of your project in your application for funding. You may also need to develop performance indicators.

(This. is discussed in more detail in Topic 4.)

Case study

The teachers, students, artists and community development worker considered what they would like to achieve.

The following list outlines some of the outcomes they identified; these will form the basis of their funding application.

outcomes

1. Community participation in cultural activities increased.

2. Educational outcomes achieved:
    research skills
    understanding of community issues and values
    cartooning skills
    curating an exhibition.

3. Community facilities established.

Activity

With your group, try to identify and list the outcomes that you expect from your project. Try to be specific.

Consider artistic, educational and social outcomes. Consider the project from the point of view of the stakeholders. What outcomes will result for them?

Negotiating sponsorship agreements

When you negotiate a sponsorship package, you are trying to develop a partnership between your organisation and a business or club that will benefit both parties.

As described before, it is very important that you first find out as much as possible about your potential sponsors. Analyse this information and match it to what you know of your own organisation and your proposed program of events and projects. A good match between your sponsor's business and social priorities and your project is most likely to be successful.

A sponsorship approach will normally have three stages: an initial phone call, a written proposal and a face-to-face meeting.

(The following information is adapted from a small publication provided by the Australia Council, *You and Your Sponsors: A guide to arranging business sponsorship for the arts*.)

1. Making the first approach

Prepare yourself well and make sure you have all details carefully summarised.

Plan ahead and make sure you approach your potential sponsor in plenty of time. You need to fit in with their planning schedule, so do your homework.

Keep your first telephone call brief. Find out who is responsible for sponsorship – it could be the public relations or advertising manager. In a small business, it will most probably be the owner or manager. Find out their name and position.

Don't try to sell your sponsorship proposal on the phone, just let them know you will be writing to them. (But be prepared to answer any questions they may ask.)

2. The written proposal

Your written proposal will contain much the same information as the grant application discussed in the previous section.

Important small points to remember are:

- keep it brief, ideally no more than two pages
- make sure the information is relevant
- good presentation is important – make sure it is well spaced, with clear headings and easy to read
- **be very specific about what you want them to do**
- outline the benefits to the sponsor – including access to your audience and publicity

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Case study

The Culture Club proposal offered the following benefits to potential sponsors of the project:

- Acknowledgement in newspaper articles
- Naming rights for exhibition
- Signage at the exhibition
- Logos on all promotional material and on catalogue
- Acknowledged on district council website

If an organisation wished to maintain an on-going sponsorship, Culture Club would display their logos on official co-op stationery, also on co-op T-shirts worn at all co-op events.

3. The meeting

The company or business is unlikely to make a decision to support your organisation on the basis of your written proposal alone, but it will help them to decide whether they want to meet with you to hear more.

There are several things to remember when you first meet with a potential sponsor:

- Present yourself well

- Research the business' operations and show an interest in them.

- Be prepared to describe your organisation and its activities.

- If two people from your group are going to attend, make sure that both know what they will do. It can be useful to have a 'talker' and a 'listener'.

- When you first enter the meeting, begin by asking questions. Give the business person a chance to talk. Ask about the company's sponsorship objectives, what projects they have been involved with, how they make decisions? Establish a dialogue and attempt to relax.

- Listen to the information you are given. If necessary, modify your proposal accordingly.

- Be clear and concise when you describe your project.

- Ask if they require further information or would like you to make a presentation to a committee or to their board.

- Establish who will contact who next.

Exercise 4b Sponsorship Proposal

Develop a sponsorship proposal targeting one of the potential sponsors you identified in Exercise 2 (b): Community sponsors .Attempt all parts of this though you may not finish it in this workshop. Use the project summary you wrote in Exercise 4 (a): Case statement as the basis for the first page of your proposal:
- Who you are – a paragraph describing the aims, objectives and activities of your organisation
- What the project is – details of the project including where and when
- The amount of sponsorship money or in-kind support required

The second page of your proposal should focus on:
- Publicity or media coverage you expect to achieve
- Other benefits you can offer

Topic 4:   Further action - evaluation, reporting and follow up

Your relationship with a funding body or sponsor doesn't end when you get the money or resources. In this topic, we look at the follow up action required.

Sponsorship

Support for one project is very useful. However, with consideration and regular contact you may be able to create a lasting partnership. It is important to develop a good relationship with a sponsor.

During the project

- Keep in contact and make periodic reports throughout the project, to keep them up-to-date on progress.
- If any problems arise that may prevent you from meeting a commitment you have made to your sponsor, let them know as soon as possible.
- Consult the sponsor with regard to the text of media releases and publicity materials, and provide them with copies.
- Invite key people from the sponsoring company to exhibition openings or first night performances.
- Include them on your mailing list to receive information about your organisation's other activities.

After the project

- Meet with the sponsor to review the sponsorship arrangement.
- Discuss what went well and what could be improved.
- Provide any report or documentation that has been agreed to.
- **Keep in touch!**
- Keep them on your mailing list and invite them to all events.

Volunteer & member contribution

It is important to acknowledge your members and volunteers who do so much hard work. Their efforts are a significant 'in-kind' resource.

Acknowledge their work publicly - in newsletters, reports and speeches. Also thank them personally.

As with any sponsor, it is important to develop a good working relationship with volunteers so that you maintain their support and commitment.

Grants

There isn't the same need to foster an on-going relationship with a funding body, however it is still a good idea to follow up with the people you had contact with. By staying in touch you will expand your network with a very useful contact.

Financial reporting & accountability

Government departments are spending public money when they support a project with a grant and so the grants programs are subject to close monitoring. You are accountable for the funds that you receive. This means that you must ensure that the money is used in accordance with the terms of the grant agreement; and keep detailed, accurate records. You must also fulfil certain reporting responsibilities.

During the project

Funding bodies generally don't require regular formal contact or reporting during the project, but make sure you check – some do. Grants for longer term programs may occasionally require a progress report and revised budget at certain stages throughout the program.

Many funding bodies will want copies of any press releases, promotional materials and publicity so ensure you keep plenty of copies at the time.

After the project

Most funding bodies will require an evaluation report to acquit the grant at the end of the project. An acquittal usually consists of audited financial reports and a written evaluation of the project outlining its success in achieving the stated objectives.

Objectives, outcomes & performance indicators

It is important from the start of your program that you develop clear objectives and outcomes, and make sure that your performance indicators are realistic and measurable. It will make life much easier when it comes time to acquit.

What does it mean?

The language of funding bodies– objectives, outcomes and performance indicators - can be confusing and a little intimidating.

Your objective is what you want to **achieve** in broad terms. The term *outcomes* refers to the specific short- and long-term **results** or **effects** of your program; and *performance indicators* are concrete indicators, or milestones, to help you **measure** your project's success in achieving its objectives.

Case study

The major stakeholders - teachers, students, artists and council – agreed on the outcomes for the project. They also developed some performance indicators to assist them with evaluating the project later and reporting back to funding bodies.

outcomes	*performance indicators*
Community participation in cultural activities increased.	• Minimum of 20 students participate in workshops. • School's involvement is maintained throughout project. Teachers participate in workshops. • At least three community sponsors are secured. • The exhibition is well-attended – at least 60 people to the opening and 150 over the week. • Use of the community workshop and gallery is sustained after the project by at least one third of the participants
Educational outcomes achieved: • research skills • understanding of community issues and values • cartooning skills • curating an exhibition.	• An historical record of significant events is developed. • The project is well researched. Details are accurate and have been verified. • Students are knowledgeable about local events, and are able to discuss the development of community attitudes. • An exhibition of the work is successfully organised.
Community facilities established.	• A community workshop space and gallery is established. • Facilities are available at minimal cost and are accessible to people with disabilities. • The facilities are promoted through local and regional tourist organisations, council information services and other appropriate services.

Review for improvement

As with any business activity, it is a good idea to review your fundraising and resourcing strategies. Think about what worked and what didn't. How can you improve?

Questions you might ask include:

- Was your resourcing plan accurate?
- How well had you predicted your needs?
- How realistic were you estimates of existing resources?
- Were your written applications and proposals well prepared?
- Were your written applications and proposals successful?
- How was your timing? Did you have sufficient lead time to prepare and submit applications?
- Did you approach enough sponsors?
- Was your proposal attractive to them?

Activity

What other factors would it be useful to review?

How can you get evaluative information or feedback about your resourcing activities?

If you were unsuccessful with a grant application, it is useful to ask the funding body for feedback. Also check out successful applications.

Debrief with sponsors and ask for suggestions to improve partnership.

Self-reflection, meeting with finance committee, group debrief…

Can you think of any other ways?

Exercise 1 (a): Skills & resources required

Choose one project or event from your program and identify the skills and resources you will need to carry out the project.

Name of project		
Activity	**Human resources or skills required**	**Physical resources required**

Exercise 1 (b): Organisational capacity

List as many assets of your organisation that you can think of. Include physical resources, funds and of course the people involved.

Assets

People	*current skills and expertise*
Reputation or track record	
Buildings	
Equipment	
Funds in bank	
Other	

Exercise 1 (b): Organisational capacity cont.

Identify any liabilities that the organisation may have and suggest potential strategies to address them.

Liabilities / challenges

Potential problems, liabilities	Strategies	Resources needed to achieve them

External factors

Identify external factors that could have a significant impact on the success of your project or event.

Exercise 1 (c): Resourcing needs

Determine your resourcing needs by matching the skills and resources required for your program with the audit of your organisation's assets and liabilities. List the resources you still need to obtain.

Name of project		
Resources and skills required **from Exercise 1(a)**	**Organisational capacity** **from Exercise 1(b)**	**Resourcing needs**

Exercise 2 (a): Grants

List two government funding bodies relevant to your organisation's core interests that you know about who can provide grants that match your program.

Identify at least one non-arts (or other core interest) government funding source.

What steps can you take to find out more?

Exercise 2 (b): Community sponsors

Think about your community and list businesses or clubs that could be potential sponsors. What support could they offer?

Type of business / group	Possible support

Exercise 2 (c): Other resourcing solutions

List other ideas for accessing resources.

What can you share or borrow from other organisations or groups?

What social fund-raising does/could your organisation undertake?

Do you charge entrance fees? Can you review your pricing policy?

What opportunities do you have for merchandising or retail sales?

Exercise 3: Resourcing plan

Develop a resourcing plan by matching your list of potential sources of support (including grants, sponsorship and other sources) to the list of resources needed that you developed in Exercise 1 (c): Resourcing needs.

Resourcing needs – Exercise 1(c)	Sources of support – Exercises 2 (a) , (b) & (c)

Exercise 4 (a): Case statement

Construct a case statement.

Briefly describe your organisation

your vision and objectives
your main activities
a brief history, or track record

Describe the project or event

the basic facts – what you want to do
the benefits or outcomes of the project to the stakeholders

Exercise 4(b): Sponsorship proposal

Develop a sponsorship proposal targeting one of your potential sponsors.

The project summary you wrote in **Exercise 4 (a): Case statement** is the basis for the first page of your proposal: The second page should focus on what you can offer the sponsor.

Publicity or media coverage you expect to achieve

Other benefits you can offer

Pathways to a Formal Qualification

As evidence of your participation in this workshop, you will receive a Statement of Attainment for the **Develop Funds & Resources** module, which will count towards the *Course in Creative Volunteering*, a nationally recognised short course for volunteers.

This workshop has been developed to align with the nationally recognised Units of Competency:

> **SRXFIN008A Secure financial resources to support the organisation**
>
> **CULMS615A Pursue and develop sponsorship opportunities**

The workbook (with the completed, signed exercises) can be presented to a Registered Training Organisation as part of your supporting evidence for Skills Recognition. (Skills Recognition is also known as Recognition of Prior Learning or RPL.) Although this workshop only introduces the subjects covered in these units, it does give an indication of the skills and knowledge that you will need to demonstrate.

Putting together a portfolio of evidence

To assist you with compiling a relevant portfolio, the following information is provided. *However you must check this with the training organisation.*

The assessor will look for **evidence** of your skills, specifically that you are able to:
- negotiate & advocate
- manage the organisation's financial activities
- write reports & applications
- work in a team
- make presentations
- apply cross cultural sensitivity to all interactions

The types of evidence you can present would usually include:
- Certificates from relevant education or training courses
- Work products such as reports, minutes of meetings, planning documents
- third party reports such as a reference (from an appropriately qualified person) that outlines relevant skills, qualities and experience you possess.

NOTE: It is important that you discuss the requirements for Skills Recognition with an assessor from the training organisation.

Further Information

Australia Council	www.ozco.gov.au
Arts Queensland	www.artsqld.gov.au
Arts ACT	www.artsact.gove.au
Arts South Australia	www.arts.sa.gov.au
Arts NSW	www.arts.nsw.gov.au
Arts Tasmania	www.arts.tas.gov.au
Arts Victoria	www.arts.vic.gov.au
Arts WA	www.cultureandarts.wa.gov.au
Dept of Arts & Museums Northern Territory	www.nt.gov.au/dam
South Australian Youth Arts Board	www.sayab.org.au
The Australian Grants Register	www.grantsearch.com
communitybuilders.nsw (or similar government community development sites in other states)	www.communitybuilders.nsw.gov.au
Philanthropy Australia	www.philanthropy.org.au
Our Community	www.ourcommunity.com.au
Fuel4arts	www.fuel4arts.com
Australia Museums and Galleries OnLine	www.amol.org.au
Foundation for Young Australians	www.youngaustralians.org
Environment Australia	www.ea.gov.au/programs/index
Dept of Industry, Tourism and Resources	www.industry.gov.au