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Fundraising Operations for the African Community Education Program

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Fundraising Operations for the African Community Education Program

An Interactive Qualifying Project submitted to the faculty of Worcester Polytechnic Institute in partial fulfillment of the requirements for the Degree of Bachelor of Science

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Abstract

The African Community Education program (ACE) of Worcester, MA helps African immigrant and refugee students realize their educational, social and cultural potential through afterschool and weekend study programs. The ACE staff is so occupied with program demands that they have little time to create a proactive funding strategy. To help ACE stabilize its funding, our group worked with ACE staff and Board members to develop a compilation of evaluated potential fundraising campaigns. We created a yearly operational fundraising plan that will help staff efficiently develop existing and implement new fundraising campaigns. These two deliverables are an important step to help ACE programming expand its reach.

Acknowledgements

It has been an enriching experience, these last 14 weeks. Our project became a journey that we would not have been able to successfully complete without the help, support, time, and guidance of a great number of people. Over the course of our project, we experienced equal shares of challenges and triumphs; joys and hardships. Throughout its entirety were our faculty advisors, Professor Corey Dehner, Director of the Worcester Community Project Center (WCPC), and Professor Melissa Belz, Assistant Teaching Professor at Worcester Polytechnic Institute's (WPI) Interdisciplinary and Global Studies Division.

We also owe our sponsor, Amy Connery, many thanks. Without her, we would never have been able to navigate the African Community Education program's environment as quickly and efficiently as we did. Ms. Connery was always willing to go the extra mile to help us with our project, and was consistently supportive as our project underwent both serious and minor changes. To the rest of the ACE community; to the staff, Board, interns, and students that graciously gave us their time, we thank you. Though ultimately for you, without you, this project would not exist.

To the nonprofit organizations that shared their time and insight and advice, thank you. To Martha Atkins of AIDS Project Worcester, Karen Wiener of the Citizen's Housing and Planning Association, Sheilah Dooley of Pernet Family Health Services, Anh Sawyer of the Southeast Asian Coalition, and Jon Sher of Earn-a-Bike we are extremely appreciative of your assistance.

Thank you Rebecca Ziino, WPI Research and Instruction Librarian, and Shari Worthington, Professor of Practice, School of Business for your help in our preliminary research.

And lastly, though definitely not the least, thank you to our fellow classmates of the WCPC. Thank you for your constructive feedback, time, and support.

Executive Summary

Introduction

Immigrant populations often have significant language barriers which in turn make it extremely difficult to improve their socioeconomic status (Clayton-Matthews, 2009). As of 2012, 29.9% of the immigrants from Africa in the United States did not speak English well or even at all (U.S. Census Bureau, 2012). As detailed in the survey conducted by Clayton and Mathews in the year 2007, the number of African immigrants in the state of Massachusetts totaled 70,000. Though the specific number of those in Massachusetts struggling with the English language is unknown, the U.S. Census Bureau information make clear that African immigrants could use assistance learning English as that service is not adequately being provided through the America's standard education system.

In the United States, students are placed in academic levels according primarily to their age rather than their current level of knowledge. Immigrant children are expected to fit neatly into the American education system, without much consideration to the fact that they may not have the same academic background and may face challenging language barriers.

In order to help the African adults and youth who are facing educational and language barriers succeed in Worcester, two affiliates of the University of Massachusetts Medical School created a nonprofit organization called the African Community Education (ACE) program. What started out as a few college student tutoring a small number of Liberian youth, ACE has grown into a fully operational organization that provides African immigrant and refugee youth a number of educational programming. Examples include an after school homework sessions complete with one on one assistance and life skills workshops that range from financial literacy to healthy dating practices. A weekend day school that focuses on English and Math is held every Saturday. Students are fed two meals, are taught a math and an English class based on skill level, then later may engage in other recreational activities such as dance, basketball, soccer or a creative self-expression class. ACE offers a positive learning environment as well as a place that students can blend any and all cultures, resulting in a space that is completely theirs. It is important to

note that these services are provided at no cost to ACE students or families as a result of the funding secured by the ACE staff.

ACE receives the majority of its funding through short-term grants, some with requirements that must be fulfilled to obtain the money, and others without. To stabilize their funding, ACE is striving to find new, long-term funding sources. Unfortunately, ACE does not currently have the budget to hire a full time fundraising director to organize and analyze fundraising events. Because ACE needs to increase their unrestricted funding, money that can go towards any purpose, our group worked to develop a yearly operational fundraising plan and a compilation of evaluated potential fundraising campaigns. Throughout the whole process of developing an idea, drafting, and finally delivering the final documents, we made sure to meet with both the staff and Board of ACE. It was quickly apparent how important it was to make sure that ACE as a whole was involved in the process. This would ensure that once gone, ACE would know exactly how to implement our suggestions should they choose to take them. With the analysis of possible fundraisers and the breakdown of current fundraisers, the process of planning fundraisers is simplified allowing both staff and Board to devote more time to finding and creating more sources of unrestricted funding.

Methodology:

In order to achieve our project goal of developing and implementing sustainable fundraising operations that would help to increase and stabilize ACE's fund revenue we identified four objectives that we needed to complete. Our project objectives were:

1. Identify ACE's fundraising priorities
2. Improve ACE's current event operations
3. Analyze potential ACE fundraising campaigns
4. Promote the implementation of the fundraising operations we developed amongst the current ACE staff, volunteers and Board members

Our group employed a variety of methods in order to accomplish these four objectives. In order to achieve the first objective of identifying ACE's fundraising priorities we conducted semi-structured interviews with the staff and Board to acquire a more in-depth understanding of the organization. We were also able to identify each individual's fundraising priorities. We attended

each weekly staff meeting and monthly Board meeting in order to gather consensus on the fundraising priorities of the organization as a whole.

In order to gather additional information about the event operations we volunteered at many ACE programs and events that took place during the course of time we had with ACE. Events we attended include the 2013 Fall Fundraiser, the after school program and the Saturday program. Becoming a part of ACE's volunteer base allowed us to experience the manner in which ACE staff delegated tasks, communicated with one another and the execution and follow through that occurred at the conclusion of important events. In order to learn more about individual efforts, we asked staff and Board members about the specific roles each of them filled during their fundraising efforts when we interviewed them. We also presented a survey to the staff using Qualtrics Research Suite in order to gather data on the number of hours per week that program employees spent on marketing and fundraising initiatives compared to the ideal number of hours they would like to spend on these tasks. To improve the documentation of ACE's largest event, the Fall Fundraiser, our group met with the chair of the event Andrea Posa. During this meeting we gathered as much information on the execution of the fundraiser as we could and compiled this information into an operations manual for ACE. In order to learn more about how other nonprofit organizations work and generate stronger recommendations for ACE, we interviewed a number of people who hold administrative positions dealing with either finances or management at other Worcester nonprofit organizations. Each nonprofit offered useful information that our team later compiled into a spreadsheet that can be reviewed by ACE.

To gain an understanding of ACE's current decision making process we interviewed David Le Boeuf, Marketing Coordinator. Mr. Le Boeuf had recently implemented a new fundraising campaign, an annual appeal, during the course of our project. During our interview we discussed his decision making process regarding this new fundraising campaign. Our group utilized the NABC value proposition, a tool design by Stanford Research Institute (SRI) to assess ideas and aide in the decision making process to analyze potential ACE fundraising initiatives (Carlson & Wilmot, 2006). We gathered a number of fundraising ideas made by staff and Board members through interviews and compiled them into a single list to analyze. We analyzed these potential fundraising initiatives using the NABC to create a compilation of analyzed fundraising campaigns.

Our final objective was to promote the implementation of our fundraising operations amongst the current ACE staff, volunteers and Board. To do this we attended every staff and Board meeting during the course of our project to gather constructive feedback on our progress. Once we researched and understood the NABC value proposition model, we presented the model to the staff to ensure they felt it was a useful tool. At the end of our project, we presented our final deliverables to our sponsors focusing on how ACE could use our deliverables after we left.

Findings

The methods we used to complete our project objectives revealed several findings that contributed to the completion of our project goal; to develop and implement fundraising operations that would help to increase and stabilize their fund revenue. Our group compiled ten findings throughout our project. The findings uncovered related to the motivation of the staff, the funding priorities of ACE, intra-organizational communication, the roles definition amongst the staff and Board, and documentation.

ACE Staff Motivation

The ACE staff are motivated to work beyond their base-line employee obligations.

Our group found that the ACE staff are motivated to work beyond their base-line employee obligations from the interviews we conducted with the staff and from the results of the fundraising effort survey we sent out. All of the ACE staff we interviewed work beyond their job responsibilities. From the survey we learned that all ACE staff contribute in some form to ACE marketing and fundraising even though very few have jobs related to marketing and fundraising.

ACE Funding Needs

ACE's greatest funding need is to increase their unrestricted funding.

Through our interviews with the staff and Board we found that ACE needs to expand their unrestricted funding. The program is currently poorly equipped to handle situations where funding is unexpectedly cut as demonstrated by their reaction to the recent loss of transportation funding. The program is also unable to hire Executive Director, Kaska Yawo as a full time staff member because they do not have the funds to be able to provide healthcare benefits to their employees.

ACE's Intra-organizational Communication

ACE Board members need a system of communication to use amongst themselves.

Through attending Board meetings and interviewing Board members our group noticed that the Board needs a better system of communication . At a Board meeting we attended, Molly Storer reflected that she did not always know what task to complete for the Fall Fundraiser because there was no central place where tasks were listed. Through our interviews, we learned that the new committee system the Board had implemented for the Fall Fundraiser was ineffective because the chair roles were undefined.

There is a miscommunication of priorities from the Board to the staff and from the staff to the Board.

Our group realized that the staff and the Board did not agree with each other's priorities through our interviews with the staff and Board and through attending Board meetings. We noticed that while the Board is more concerned with "big picture" ideas, the staff focuses more on specific details with regards to fundraising initiatives. Mr. Yawo, who is supposed to serve as the liaison between the staff and the Board, works part time, so communication between the staff and Board suffers.

The lack of hierarchical authority in ACE results in reduced accountability amongst staff and Board.

By attending Board meetings and Board interviews our group found that the lack of accountability in ACE is due to their lack of a hierarchical authority structure. Staff members expressed that a difficulty they experienced during the planning and execution of the Fall Fundraiser was the lack of a clear chain of command. Through our interview with Olga Valdman, Co-Founder and Vice-Chair of the Board, we found that she felt ACE needed a clear leader for every aspect of ACE.

Role Definition Amongst the Staff and the Board

ACE has not defined clear staff roles related to fundraising

We found that ACE has not defined clear staff roles through our interviews with the staff. We learned that many fundraising tasks are taken on by staff members on an "as needed" basis. Due

to the lack of clearly defined roles many tasks get worked on twice by two staff members while others are not worked on at all.

ACE Board members do not all understand their role as a Board member of ACE

Through the interviews that we had with the recently inducted Board members of ACE, we found that not all ACE Board members understand their Board responsibilities. We interviewed the three recently inducted Board members of ACE and all claimed that they did not have a clear understanding of their responsibilities. Ms. Storer and Dennis Nyeayea both claim that they would be able to devote more time to ACE if they knew what they could do for ACE as a Board member.

ACE's Documentation

The operations of ACE's Fall Fundraiser are poorly documented

During our interviews with ACE staff and Board we learned that there was almost no documentation on how the Fall Fundraiser was planned and executed over the past two years. The members of the staff and Board that had worked to plan the event in the past had a clear idea of what had to be done but the rest of the program had no documentation to work from and had to rely on the returning members.

ACE does not have an efficient system to track their donors

We found that ACE does not have an efficient system to track their donors through our interviews with the ACE Board and staff. Ms. Connery explained to our group that ACE has three donor databases currently with differing purposes and information. This system makes it difficult for ACE to track their donors. Ms. Valdman would like to see ACE also track how donors are related to ACE, as they do not currently track this information. Mr. Le Boeuf has implemented an annual appeal to gauge the activity of ACE's donor base but feels the current donor base is not a sufficient structure to keep track of the results of his annual appeal.

There is no system in ACE to document the planning of new fundraising initiatives

The ACE staff and Board begin to plan new ideas without having a systematic approach to how new fundraising should be implemented. We learned through our interviews with the Board and staff that many of the fundraising decisions the program makes do not have a decision making process to support them. This makes it difficult for the staff to pitch ideas to the Board because

the Board needs to see more of a decision making process and weigh the options before they are willing to implement a new idea.

Recommendations

Our student project group devised seven recommendations for the African Community Education program to improve their fundraising operations. The seven recommendations we devised are for ACE to:

1. Use the ACE mission as a marketing tool
2. Improve the donor database organization
3. Develop and implement a yearly Board orientation
4. Have both staff and Board represented at staff and Board meetings
5. Use Ticketleap.com to organize event attendance and ticket sales
6. Apply the NABC value proposition to the list of fundraising ideas we compiled to strategize new fundraising events
7. Utilize and improve upon the operations plan we developed for the Fall Fundraiser

Conclusion

It is our hope that with the suggestions we proposed and the strategies we provided to ACE, that we have helped ACE along its journey of creating and implementing a strategic fundraising plan. Our group hopes to return to ACE at a future time to observe the long term effect that we've had on ACE's operational structure and overall success.

We strongly desire that our project helped to give ACE renewed incentive to actually implement all of the ideas it has. ACE knows what areas it struggles with, yet the staff does not have the time to address them. ACE is an important and impactful organization and we hope our efforts help ACE continue to be a light in the Worcester community.

Authorship

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CHAPTER THREE: METHODOLOGY	Written by Dominick Calvao & Kiara Vincent, Edited by Cynthia Rogers & Dominick Calvao
CHAPTER FOUR: FINDINGS	Written by All, Edited by Dominick Calvao & Cynthia Rogers
CHAPTER FIVE: RECOMMENDATIONS	Written by All , Edited by Dominick Calvao & Cynthia Rogers
CHAPTER SIX: CONCLUSION	Written & Edited by Cynthia Rogers

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Chapter One: Introduction

The Worcester community is home to a rich mix of people. Different cultures work, live and coexist with each other within a fairly confined environment. A significant portion of this community consists of African immigrants or refugees who have come to the United States (US) for a number of reasons. Some have been displaced or are seeking refuge from violence while others have emigrated for social or economic reasons. One struggle all immigrants and refugees share is the difficulty they experience in acclimating to their new surroundings in the US. The struggle of acclimation is further exacerbated by the limited transitional assistance offered by the United States immigration offices. Immigrants and refugees must learn English, acclimate to American social norms and learn to co-exist in an entirely different culture from their own with very little help.

The challenges of language barriers, cultural acclimation and social dissonance are acutely present for the first generation children who emigrate from their home countries with their parents or relatives. Children are faced with similar social and cultural challenges as adults who immigrate, but children are also presented with additional educational trials that their adult counterparts may not encounter. In the US, African refugee and immigrant students are placed in schools based on their age rather than based on their skill level. Immigrant children are expected to keep up with their American peers even though they may not have ever attended school before. As a result, the grades of many African immigrant and refugee children can suffer which makes it difficult for them to get into institutions of higher education or find stable employment after high school.

Kaska Yawo, a Liberian immigrant himself, and his associate from the University of Massachusetts Medical School, Olga Valdman, created the African Community Education (ACE) program in order to help these students succeed in Worcester, Massachusetts. The African Community Education program is a non-profit organization that provides African immigrant and refugee children with after school and weekend academic tutoring as well as opportunities to engage in social and cultural activities with their peers. These services are provided at no cost to the students or their families which necessitates organized fundraising by ACE staff. The current

financial structure of ACE is largely dependent on grants which cannot be relied on to provide long term funding.

In an effort to help increase the stability of ACE's funding, the goal of our project was to work with the ACE staff and Board of Directors (Board) to develop and implement fundraising operations that would help to increase and stabilize their fund revenue. We worked to analyze the current state of ACE's funding and from there developed operations that will allow ACE to improve their current fundraising events and implement new fundraising events.

The operations we created serve as a set of guidelines for ACE detailing the process the organization should go through when organizing their annual Fall Fundraiser. To create these operations we first assessed ACE's fundraising priorities to determine what we could do that would be the most useful to ACE. Through our collaboration with ACE we decided to create two deliverables. One deliverable broke down the tasks of the Fall Fundraiser. The other deliverable analyzed potential fundraising campaigns.

In chapter two of this project report we present a literature review of sources focused on immigration, nonprofit charities generally and an introduction to ACE, as well as a summary of and operationalization of nonprofit marketing practices. Chapter three contains our methodology. In it we detail our four main objectives and the steps we took to achieve them. Our findings have been compiled into chapter four and our recommendations are presented in the fifth chapter of this report. Chapter six concludes this report.

Chapter Two: Literature Review

Section 2.1: Introduction

Immigrants are people who have voluntarily left their country of origin to live in a foreign country. Once settled in the United States, immigrants must be self-sufficient. The federal government has little transitional assistance for them. Refugees, unlike immigrants, are forced to leave their country. Civil wars, political unrest, and religious persecution are examples of events that can cause people to become refugees. Upon arrival in the United States, there are institutions that refugees may go to that provide them with assistance until they either return to their country or become an American citizen. Recognizing the lack of institutionalized help for African-born people in the United States and seeing many struggling immigrants in Worcester, Kaska Yawo and Olga Valdman united to create a system to help African immigrants achieve their social, cultural and educational goals. Having immigrated to the city of Worcester themselves, both Yawo and Valdman had a personal connection with the challenges associated with acclimating to life in a new country. Yawo and Valdman created the African Community Education (ACE) program in 2006. Evolving from a simple hourly tutoring program run by a few University of Massachusetts Medical School students, ACE is now a comprehensive organization with an assortment of programs for African youth and adults. ACE must stabilize and increase their funding to expand their program to help more immigrants. It is thus our goal as a group of student researchers to assist ACE with its operational and fundraising strategy.

This chapter provides background information to help the reader understand issues relevant to our project. In Section 2.2 we discuss the immigrant population of the United States and the struggles they face upon arriving to this country. In Section 2.3, we discuss non-profit organizations in the United States that serve as a resource for immigrants and other groups. Following that, in Section 2.4, we narrow our focus to ACE and explain in detail how it supports African immigrants. In the final section, we discuss the use of strategic planning in a nonprofit organization.

Section 2.2: Immigrants in America

Refugees and immigrants struggle with acclimating into American culture, which often has a negative impact on those individuals and on the community to which they immigrate. Whether escaping a war torn country, seeking higher education or seeking a better livelihood, immigrating to a new country is difficult. The United States has one of the largest immigrant populations in the world. The number of immigrants in the United States has risen from 31 million in 2000 to 40 million in 2010 (Camarota, 2012). As of 2010, 998,900 immigrants made their home in the state of Massachusetts ("The foreign-born population," 2012).

According to a 2009 demographic analysis by the Institute for Asian American Studies, 29.1% of the immigrants who have emigrated from Africa to the United States do not speak English well, or even at all (Clayton-Mathews, McCormack & Watanabe, 2009). With the language barrier in place, non-native peoples will find it extremely difficult to improve their socioeconomic status (Clayton-Mathews, McCormack & Watanabe, 2009). In the year 2007, 179,000 immigrant youth aged 5-17 were enrolled in the Massachusetts public school system (Clayton-Mathews, McCormack & Watanabe, 2009). Immigrant youth face educational difficulties due to language barriers. Education however is only a small facet of the struggles that people experience when beginning the journey of living in another country.

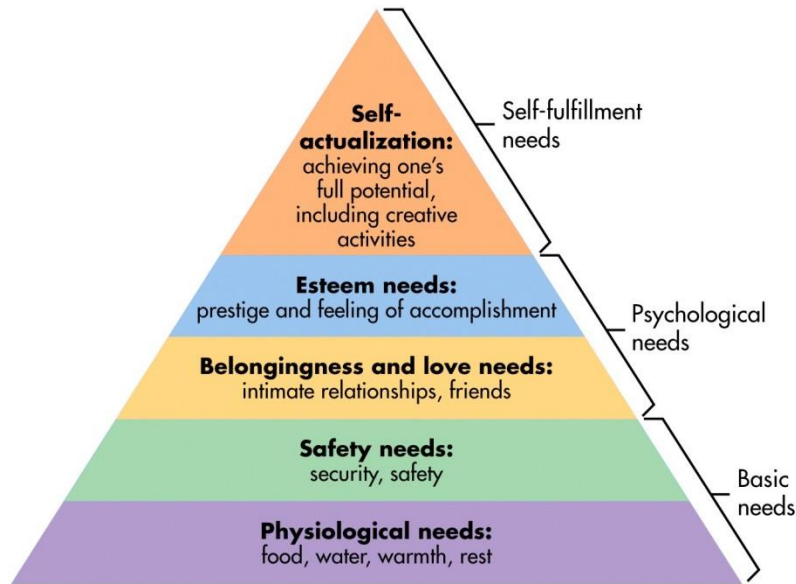


Figure 1: Maslow's Hierarchy of Needs (socialearth.org)

For every person, there are certain needs that must be met in order to achieve different tiers of personal wellbeing. These needs are broken up into levels by Maslow's Hierarchy of Needs as seen in Figure 1. Maslow's Hierarchy of Needs is a widely accepted psychological theory that states that a person will only strive to obtain the simplest need they have not obtained and will not attempt to obtain anything higher than that unmet need. If a person does not attain basic human needs such as shelter, safety and sustenance, that person cannot attain higher level needs such as love, esteem or self-actualization (Maslow, 1943).

In their home countries, immigrants may have already met the needs of higher tiers, such as education, creativity, careers. Upon arriving in a new country, immigrants have to start over from the bottom of the hierarchy. They must find a constant supply of food and a safe place to live. After meeting basic needs they may begin the journey of meeting higher needs like economic self-sufficiency.

The United States government attempts to meet these immigrants and refugees needs through two programs: the Refugee Resettlement program and the Immigration and Nationality Act. The United States Refugee Resettlement program is designed to "provide for the effective resettlement of refugees and to assist them to achieve economic self-sufficiency as quickly as possible" ("Off. of refugee," 1995). Economic self-sufficiency fits into the safety tier in

Maslow's hierarchy, so the resettlement program should be working to fulfill all the needs below this level as well. The Immigration and Nationality Act mainly focuses on monitoring the status of immigrants to make sure they are abiding by all of the laws and regulations placed on them ("Immigration and nationality," 2013). These two government policies leave populations in need of support: non-refugee immigrants have almost no support from the American government and refugees have no support after attaining a sufficient economic status.

State and local governments do much to support immigrants and refugees like Seattle's Human Services department which recognizes that "immigrants and refugees face many challenges upon arrival in the United states..." ("Immigrants and refugees," 2013). Each state had different policies to aid immigrant transitions to the United States. The state and federal governments can only fill the needs of immigrants and refugees in the United States up to a point, and after that more targeted approaches must be taken. The lack of government support for immigrant needs necessitates the initiatives of nonprofit organizations to target more specific populations.

Section 2.3: Nonprofit Charities

Nonprofit charities are organizations that operate "solely for the benefit of the public" ("Public charities or," 2013). Any revenue gained by nonprofit organizations goes directly back into providing services. Financial reserves remain in corporate accounts to pay for activities hosted by the nonprofit, salaries of employees and other expenses ("Public charities or," 2013). Unlike a for-profit-corporation, a not-for-profit organization's surplus revenue does not get distributed to investors or shareholders. In this section, we discuss what "nonprofit" means to the government, the importance of overhead in a nonprofit organization and the common goal of growth and financial stability within a nonprofit organization.

Government Status

If an organization is deemed a nonprofit in Massachusetts, the state government supports the organization financially by allowing their transactions to be tax-exempt ("The non-profit organizations/public," 2013). To ensure that organizations do not take advantage of their nonprofit status, the Attorney General's Nonprofit Organizations/Public Charities Division oversees the nonprofit status of corporations ("The non-profit organizations/public," 2013). The

purpose of the Public Charities Division is to ensure that non-profit charities are indeed benefiting the public with their surplus revenue ("The non-profit organizations/public," 2013).

Nonprofits that are approved by the Non-profit Organizations Division of the Attorney General of Massachusetts benefit the public by supporting different needs on Maslow's pyramid. The approved nonprofits may support the most basic of needs (food, water and reasonable shelter) or needs that are higher on the pyramid but all efforts work to support a community need (Galvin, 2012). A key measurement for determining whether a nonprofit is benefiting the public is the organization's overhead efficiency.

Overhead

Overhead efficiency is the percentage of overhead out of an organization's total expenditure. ("9b. nonprofit fundraising," 2004). Overhead in nonprofits is any expense that does not contribute to community needs directly. Examples of overhead expenses include administrative and fundraising costs ("9b. nonprofit fundraising," 2004). When donors are deciding which nonprofit organization to support, donors often look for a low organization overhead. A low organization overhead is considered less than 25% of total expenditure by the Combined Federal Campaign ("9b. nonprofit fundraising," 2004). The Combined Federal Campaign is the world's largest government nonprofit funding nonprofits associated with health and human services. Overhead indicates that most of the organizations revenue is used to benefit the community directly. Ideally, to attract donors, nonprofits maintain organizational transparency (public financial records & operations and maintain a low overhead.

Maintaining a low overhead also means that nonprofits have a significant administrative and fundraising disadvantage to for-profit organizations. Dan Pallotta, an expert in nonprofit organizations who has organized highly successful fundraising events, believes that for-profits have significant advantages over nonprofits when it comes to employee compensation, advertising, risk taking, time to organize before implementation and donation attraction (Pallotta, 2013). The government attempts to compensate for this gap by allowing nonprofit services to be tax exempt. Nonprofits do not compete with for-profits directly for donations but for-profits have a significant risk-taking advantage over nonprofits. Pallotta states that if a nonprofit could take the financial risk of buying a full page ad in the New York Times and accept the large

overhead cost, the nonprofit would reach a larger audience and thus attract more attendees to fundraising events (Pallotta, 2013). Nonprofits don't do this, however because they cannot justify the large, risky overhead expense to the public. When organizations hold large-scale fundraising events, there is a financial risk. Nonprofits must consider the financial risk associated with any advertising or fundraising expense more carefully than for-profit organizations because they must justify all overhead expenses to the public.

Unrestricted Funding and Financial Stability

For any nonprofit organization, there is a difficult process for growth as well as reaching financial stability. In order to expand, a nonprofit needs to focus on its financial situation. Nonprofit organizations rely on numerous sources of revenue including grants, donations, and sponsorships. Most nonprofits, in their beginning years, "typically have a diverse set of funding sources, with a large percentage of the money coming from foundations" (Foster and Fine, 2007). Foundations award certain grants to nonprofit organizations. However, when grants are awarded there may be restrictions on what the money can and cannot be used for. To increase the amount of *unrestricted* funding and reach financial stability, the nonprofit will need to reach out to different sources of revenue (Kim, Tollerud & Perreault, 2012). There are many benefits of unrestricted funding including opportunities such as hiring more full time staff in order to focus on the mission of the nonprofit organization.

In order to increase unrestricted funding, nonprofits often hold fundraisers for its organization. However, even fundraisers can be seen as risky. Nonprofits do not make many risky decisions because, in most cases, there is no financial support (Kim, Tollerud & Perreault, 2012). For example, when planning a fundraiser, the input and potential output must be weighed. This is important to consider when trying to expand a nonprofit organization. Like any nonprofit organization, the African Community Education program strives to reach financial stability and increase its unrestricted funding.

Section 2.4: African Community Education

The African Community Education (ACE) program has multiple community programs which address the social, educational and cultural challenges that immigrants and refugees in Worcester face. Children are able to attend after school and Saturday programs, both of which assist them in multiple facets of life not only including their academic skills, but their social skills and cultural integration. During the after school program students receive extra help and individual attention while reinforcing the concepts they learned earlier that day in school (Mitra, 2011; "After-school tutoring,"). This helps each student gain a more concrete understanding of subjects they would otherwise struggle with and keep pace with the rest of their classmates.

The after school program, however, is small compared to ACE's Saturday Program. Saturdays serve as a 6th day of school for ACE students where they receive both, extra class time and individual attention. After breakfast, students spend their mornings in either a remedial English or math class taught by volunteers. After a lunch break students engage in a few non-academic activities to stimulate them outside of the classroom such as dancing, drumming and soccer. There is also a workshop called Express Yourself where students spend their time simply discussing and expressing their thoughts and feelings with each other and staff (Mitra 2011). By engaging students in different ways, ACE ensures a more holistic education where students learn how to interact with others and how to cope with, what is for some of the students, a huge culture shock. Statistically, ACE has definitely had a positive impact on its students. Over the last 6 years, 92.9% of the students have graduated and gone on to college compared to the Worcester average of 72.3% ("Massachusetts schools and," 2012). The program also assists adult immigrants who are trying to integrate into life in Worcester.

The African Community Education Program also facilitates English for Speakers of Other Languages (ESOL) classes as well as naturalization courses (ACE, 2013; "Adult ESOL & Citizenship Classes") for adults. Naturalization is the process by which an immigrant or refugee can learn about American society and, pending the favorable result of an exam, become an American citizen. These classes help bridge the language barrier and cultural gaps experienced by adult immigrants coming to Worcester. While immigrants learn about American and

Worcester culture, ACE also celebrates the traditions and culture of the participants during the annual Fall Fundraiser and Spring Festival.



Figure 2 Traditional Drumming at ACE's Annual Spring Festival (ACEchildren.org, 2013)

Outside of programming, ACE also holds two annual events: the Fall Fundraiser and the Spring Festival. The Fall Fundraiser has been ACE's main fundraiser for the past three years. During this event, guests enjoy traditional African food, culture, and most importantly they see the amazing impact ACE has for its students with student testimonials. The Spring Festival is not a fundraiser, although donations are accepted. Its purpose is to bring the students and staff of ACE and the Worcester Community together to embrace the African culture that surrounds them. An African drumming demonstration at the Spring Festival is depicted in Figure 2. The festival is also a showcase of the different traditions and values of the families involved with ACE (Mitra, 2011). The two events serve as such an important marketing and fundraising tool. With only 4 full time staff, 6 part time staff and 9 Board members, these events require much planning.

Every staff and Board member contributes to the planning and execution of the Fall Fundraiser and the Spring Festival. The organizational structure of ACE includes the staff of ACE and the Board members. The Board members make certain financial decisions and make sure ACE stays in alignment with its mission. The staff works closely with the program and events that ACE holds. They are also responsible for ACE's interns and volunteers. The Executive Director is responsible for maintaining communication between the Board and staff. The Program Director oversees the staff due to the fact that the Executive Director only works part-time for ACE ("African community education," 2013). For nonprofit organizations, it is extremely important for it to have a full time Executive Director that oversees the program and bridges the communication gap between the Board and staff members (Kim, Tollerud & Perreault, 2012). In

order for ACE to be able to hire its Executive Director full time, ACE needs to increase its unrestricted funding. To increase funding, there needs to be strategic planning for its fundraising and marketing events in order to ensure a higher source of revenue. It is important that nonprofit organizations solidify a strategic planning process to maintain stable funding in order to decrease its reliance on grants and have extra funds to hire more full time staff.

Section 2.5: Nonprofit Strategic Planning

Nonprofits can implement strategic planning to successfully improve target activities within their organization. Strategic planning allows a nonprofit to “focus on a selected number of goals in order to concentrate the organization’s energies and resources for a period of time”(Gelatt, 15). Selectivity is the

key to strategic planning as it puts on blinders that help the organization make strategic decisions that work towards fulfilling a goal (Gelatt 1992).

Our group has focused on steps 3, 4 and 5 of the strategic planning map in Figure 3. Note that we’ve skipped the first two steps of strategic planning. As a brief overview of the mission and environmental scan steps, an existing nonprofit likely already has a concrete mission statement. All strategic planning should relate back to the mission. Environmental trends assess the effect of external trends (such as an increasingly culturally diverse society, or a new technology shift) on an organization (Gelatt,1992). Environmental trends help an organization tailor goals that help them adapt to external change. Our group hopes to affect internal change in ACE so we will discuss strategic planning steps after the environmental scan: setting strategic goals, finding strategic direction, and developing strategic objectives.

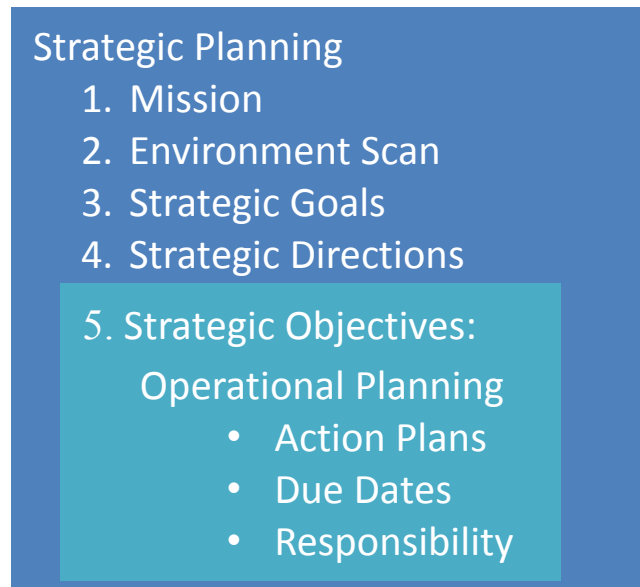


Figure 3: Strategic Planning Overview (Gelatt, 19)

Setting Strategic Goals

Nonprofits can begin to create a strategic plan by formulating strategic goals (Step 3 in Figure 3). A strategic goal allows an organization to focus on fulfilling their mission. A nonprofit organization can work to better fulfill their mission by either improving current infrastructure or expanding to new opportunities. A nonprofit with stable funding and working programs should consider what goals they can set to fulfill their mission in new ways. A nonprofit that is in the process of expanding can set goals to stabilize their new infrastructure. Strategic goals “help to clarify intent” of the overall organization (Gelatt, 16).

Different departments in an organization may each have goals to fulfill the nonprofit’s mission. While each department in a nonprofit may find their work highest in priority to fulfilling the nonprofit’s mission, strategic planning requires that the whole organization choose only a fraction of all goals (this may mean one to a few goals depending on the size of the nonprofits workforce) to focus effort on (Gelatt 1992). Because some goals will become higher priority than others, the nonprofit staff and Board members should spend time and effort to determine the goals they wish to strategically focus on. A great need or opportunity may become the basis for a strategic goal.

A strategic goal should be long term so it can give the nonprofit a direction to move in. Strategic goals should be accomplishable within 3-5 years of conception. (Gelatt, 1992). Because strategic goals are long term, they should not be so specific that small external or internal changes would become risks to accomplishing the goal (like a staff member leaving the organization). Strategic goals should be specific enough that they focus on specific improvements to be made to the organization that would contribute to the mission in a specific way. Some examples of good strategic goals according from “Managing the Nonprofit Organization” by Dr. James P. Gelatt, graduate professor of business management at the University of Maryland are listed below:

- Designing high-quality research
- Reaching maximum enrollment
- Remaining viable fiscally while enjoying growth
- Developing assessment and therapy procedures
- Becoming nationally recognized for the quality of its service, research and training

(Gelatt, 22)

Notice how these goals are specific enough that alone they each could not become a specific mission statement. These goals are, however general enough that there is no singular, clear way to achieve any of them. There are many different options for achieving any of these goals which is why it is important here to determine the strategic direction (or, approach) the organization should take to achieve these goals.

Finding a Strategic Direction

Once strategic goals for an organization have been defined, there may be no clear way to implement these goals. The nonprofit could take any one of the variety of directions they might think of to achieve the goal. One way the organization could choose a specific direction to take is by using the NABC, a strategic decision making tool adapted from SRI's innovation development tool.

The NABC Value Proposition

The Stanford Research Institute (SRI), a nonprofit devoted to the development of new research and technology initiatives, developed the NABC value proposition as a tool to help people develop new, innovative ideas. The NABC helps define an innovation with regards to different stakeholder viewpoints. By using the NABC model, a person can gain support from key stakeholders for their innovation and can determine the value of their approach. At its core, the NABC serves as a model to document decision making. By taking into consideration the needs of different stakeholders, and weighing the benefits per cost of one approach against another approach, the NABC serves as a viable model for making informed decisions in almost any situation.

“NABC” is an acronym used to represent the key concepts of four questions that comprise a value proposition.

1. What is the important customer and market *Need*?
2. What is the unique *Approach* for addressing this need?
3. What are the specific *Benefits per costs* that result from this approach?
4. How are these benefits per costs superior to the *Competition's and the alternatives*?

(Carlson & Wilmot, 88)

The first question forms the “N” in NABC. In product terms, the *need* forms the description of the market need and helps identify market opportunity (Carlson & Wilmot, 2006). If the product was a decision, though, the need would be the reason for making a specific decision. For example, if you’re tired, your *need* may be to feel healthy or to be more focused. You can take different *approaches* to fill this need which brings us to the second question, the *approach*.

The second question deals with the *approach* taken to fill the need(s) in the first question. Often, the *approach* is the question that is easiest to answer and thus gets the most attention. If the product is a decision, then the approaches are the different choices you have to make the decision. If you *need* to feel less sleepy, one approach you could take is to sleep. Another approach you could take is to drink some coffee.

Note that it’s easy to confuse an *approach* with a *need*. In this example it’s easy to think that the *need* is to sleep if you’re tired. However, people choose to stay awake instead of sleep all the time when they’re tired. There is a *choice* between sleep and another alternative here, so we can see that sleep is an approach and not a need as an example in the NABC. To weigh different approaches against each other, we move on to the third and fourth questions.

The third question deals with *benefits per cost* and forms the “B” in NABC. Inventors define the benefits per cost of their product to determine the value the product may have to different stakeholders (Carlson & Wilmot, 2006). Referring to a decision, the benefits per costs weight reasons *for* making a specific choice, against reasons *for not* making the choice. In our sleep example, if our approach is to drink coffee, the benefits are that we immediately feel more focused allowing us to keep working. The costs might that we would be agitated and would feel much less focused after the effects of the coffee wear off. If our approach was to sleep immediately for a full sleep cycle, the benefits would be that we would be able to regain our focus to its full potential and be focused the next day. The costs would be we would be incapacitated for however long our full sleep cycle is. To choose between the two approaches we weigh them against each other in the final question, the “C” in the NABC.

The last question of the NABC asks us to weigh the benefits per cost of different approaches against each other to determine which approach has the best benefit per cost (Carlson & Wilmot, 2006). Inventors can use the benefits per cost section to compare their product to another similar

product. In the example where we can choose to either sleep immediately or drink coffee to feel more awake we cannot make a decision between the two until we know more about our own situation. We cannot determine which approach is better until we re-define our needs. If we need to keep working late into the night, then the obvious choice is the option where we drink coffee to stay awake. If there's nothing we need to do, then there's no extra need and the choice can be made to go to sleep immediately.

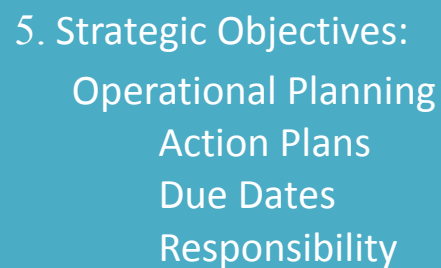
Notice that when choosing to sleep or drink coffee we had to go back to the needs section of NABC and redefine our answers to the first question. Creating a well thought out NABC requires the creator to iterate through the questions many times. Often those who write NABCs bounce their ideas off of other people to gather outside feedback to add to the NABC.

In the same way the NABC model facilitates decision making, so can it work to provide direction when creating smaller objectives to achieve within a goal. Nonprofits can use the NABC to pick a specific direction to take when completing a goal. To do this, the strategic goal becomes the "need" of the NABC. For each different approach the nonprofit considers taking to fulfill a goal, they create a new NABC and weigh the different benefits per costs against other approaches they consider.

Creating Strategic Objectives

Strategic directions describe how a goal will be achieved while strategic objectives describe what will be completed within the direction (Gelatt, 1992).

While strategic directions are still vague enough that there may not be a clear path of implementation to move in that direction, strategic objectives describe specific actions that will be taken within that direction, with a date for completion and delegation of responsibility to specific people. A strategic goal might be split up into three different strategic objectives, each taking a year. Each objective is broken down into an operational plan as seen in Figure 4.



5. Strategic Objectives:
Operational Planning
Action Plans
Due Dates
Responsibility

Figure 4: A breakdown of Strategic Objectives (Gelatt 1992)

Operational Planning

Operational planning creates a document called an operational plan. An operational plan details the timeline and tasks that must be completed to within a single objective. Each task describes the task to be completed in detail, and includes who will complete the task, and by what date the task will be completed (Gelatt,1992).

A task is the smallest measure of a strategic plan. A task has the largest risk to fail because its requirements are very specific. The operational plan depends on tasks being completed on time and by the person they are assigned to. A task can fail if the person who the task is assigned to does not have the necessary resources to complete the task. Task might not be completed on time or by right person due to unforeseen circumstances. Although tasks have high risks associated with, a failed task should not throw off the whole operational plan. A good operational plan has back-up tasks in the case that a task fails.

Good operational plans are designed to take into account for tasks failing. Often built into the plan will be a continuous reassessment of the operational plan within the objective it is formed to complete. For the reason that the plan must be revisited so often, Gelatt advises that those who create the operational plan are the same or are some of the people who are part of its implementation (Gelatt, 1992). This way, the planners will be closely familiar with any issues or successes within the operational plan and will be able to make better informed decisions about the plan.

Chapter Three: Methodology

The African Community Education (ACE) program of Worcester originally requested research and development of a marketing plan to increase and stabilize their fund revenue. During the course of our project, our group found that a student group from Clark University created a marketing plan for ACE in 2011. The program could not implement the 2011 marketing plan recommendations because many of the recommendations were long term. The African Community Education program had no clear set of operations to fulfill these recommendations. We changed our goal in response to the discovery of the Clark student group's marketing plan in hopes that our group would be able to have a greater impact on ACE. Our new project goal was to work with the ACE staff and Board of Directors (Board) to develop and implement fundraising operations that would help to increase and stabilize their fund revenue.

Our group completed the following objectives to accomplish our revised project goal:

1. Identify ACE's fundraising priorities
2. Improve ACE's current event operations
3. Analyze potential ACE fundraising campaigns
4. Promote the implementation of the fundraising operations we developed amongst the current ACE staff, volunteers and Board members

This methodology chapter comprises the methods we used to complete the project objectives.

Section 3.1: Identify ACE's Fundraising Priorities

Our group needed to first understand ACE's fundraising priorities to make informed recommendations for fundraising operations. We identified funding goals the staff and Board felt were most important to the long term welfare of ACE. To identify these goals our group interviewed with the ACE staff and Board and gathered consensus at staff and Board meetings.

Interviewing ACE Staff

Our group set up interviews with each full time and some part time staff members of ACE. We interviewed Amy Connery, Volunteer Coordinator and our project sponsor, David Le Boeuf, Marketing Coordinator; Julia Kilgore, Program Director; Kaska Yawo, Executive Director; Kim

Edwards, Saturday Program Coordinator; and Amy Corneliussen, Grant Writer. We asked each staff member what they felt ACE's financial needs were and what they knew of ACE's current funding strategy. The staff interviews we held were semi-structured. Semi-structured interviews allowed us to focus on the general topic of ACE fundraising priorities. The questions we asked staff members are included in Appendix A.

Interviewing ACE Board of Directors

Our team interviewed the ACE Board of Directors to determine the Board's involvement with fundraising and marketing initiatives. We interviewed Molly Storer, Josiah Bote and Dennis Nyeayea, all of whom are first time Board members. We gathered these Board members' impressions on ACE's funding issues. We also interviewed Olga Valdman, Andrea Posa, Toy Lim and Sandra Anim, ACE's returning Board members to learn more about experiences they've had with ACE's funding issues. We conducted semi-structured interviews and focused on the following questions.

- What are your thoughts on ACE's current financial position?
- What is the current direction of the ACE program?
- Concerning fundraising, what are some of the methods you have seen ACE employ?
- What are the biggest challenges ACE currently faces?

A complete list of interview questions for the ACE Board of Directors can be found in Appendix B. We compiled data from the Board of Directors and staff interviews into one document. Our group analyzed this document for trends relating to funding priorities. We searched for funding needs that many members felt were high priority. Once our group determined which funding priorities were most prevalent we brought our findings to the staff and Board for consensus.

Gathering Staff and Board Consensus

Our group attended the Board meeting on the 4th of November, 2013 and the staff meeting on the 5th of November, 2013. At both meetings we presented the interview process we completed and the results of our analysis of these interviews. We asked for feedback to ensure that the findings we had gathered from the individual staff and Board members were also the consensus of the whole staff and Board respectively. Our group facilitated a discussion at each meeting to come to a consensus on ACE's highest funding priorities.

Section 3.2: Improve ACE's Current Event Operations

The African Community Education program's event operations need improvement for them to be able to implement long term plans. Event operations are comprised of specific tasks to be completed within a specific amount of time and who those tasks will be completed by. To improve ACE's current event operations our group observed the Fall Fundraiser, interviewed ACE staff about fundraising roles, compiled a chart of ACE's current staff organizational structure, surveyed staff about current fundraising efforts, documented the current ACE Fall Fundraiser operations and interviewed other Worcester nonprofit organizations.

Observing the Fall Fundraiser

Our group attended ACE's Fall Fundraiser as volunteers on the 24th of October, 2013 (Figure 5). Volunteering allowed us to observe day-of event operations. We volunteered as cashiers, an usher and a food server. Volunteering in these capacities allowed us to observe the event from different perspectives. We observed the methods ACE staff used to delegate tasks, communicate with one another and see what decisions had to



Figure 5: Our group volunteered at the Fall Fundraiser to learn about ACE event operations

be made at the time of the event. We did not document our observations of the Fall Fundraiser

because we had not changed our original project goal at that time. Nevertheless, we gathered a concrete first impression of ACE's event operations. This first impression helped us determine our current project goal and served as the foundation of our understanding of ACE's event operations.

Interview ACE staff about fundraising roles

To understand how different staff roles worked within the fundraising operations of ACE, we interviewed ACE staff about their fundraising roles. We chose to conduct interviews so that we could sit down with the staff for about an hour each and receive a detailed account of their fundraising responsibilities. We felt that we would pull more detailed information out of interviews than we would from a survey. After we conducted most of our interviews we

compiled the information we had gained regarding the different roles and responsibilities in ACE in the form of a chart of organizational structure.

Compiling a chart of ACE’s current staff organizational structure

We compiled a chart of which staff member completed which repetitive fundraising tasks from the data we gathered from our interviews. By representing ACE’s different staff’s fundraising roles in a chart, we were able to observe if their roles overlapped. The chart also allowed us to present our findings to ACE in an easily understood format. We used the software, Minidomo to create the chart because it did not require any training and was conveniently accessible online.

Surveying staff about current fundraising effort

To determine improvements we could make to event operations we identified the overall trends in fundraising efforts. Our group utilized surveys to determine how much time the staff at ACE puts into fundraising and how much time they would ideally devote to fundraising.

Because the data we wanted to collect was the number of hours per week the staff worked and wanted to work on fundraising was quantitative a survey was the most efficient collection method. Our group used Qualtrics Research Suite to collect this data because the software and the training to use it were provided to us by Worcester Polytechnic Institute. Qualtrics also boasts superior functionality to other survey

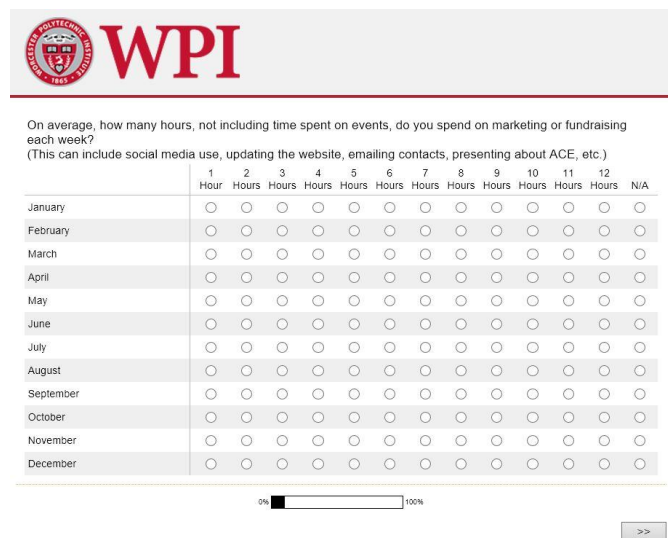


Figure 6: Staff survey

software as it allowed us to use a variety of different questions types and email individualized links to the staff which allowed us to send reminder emails only to the staff that had not yet completed the survey. An example of one of the survey questions is pictured above in Figure 6. The full list of survey questions can be found in Appendix C. The data from this survey and the resulting graph of weekly effort of staff fundraising can be seen in Appendix D.

Document current ACE Fall Fundraiser operations

In order to examine the operations of the Fall Fundraiser we interviewed the event chair, Board member Ms. Posa. Due to a lack of previously held event documentation, interviewing Ms. Posa was the most effective way of gathering information related to operations of past Fall Fundraisers at ACE. We interviewed and iterated with Ms. Posa to create and compile a document detailing all of the steps that need to take place for the Fall Fundraiser. We compiled our findings into an operations detail of tasks to complete for the Fall Fundraiser. This document can be found in Appendix E.

Interviewing other Worcester nonprofit organizations

We contacted and interviewed five local Worcester nonprofit organizations to understand how other nonprofits operate. We interviewed Martha Akstin of AIDS Project Worcester, Karen Wiener of Citizens' Housing and Planning Association (CHAPA), Jon Sher of Earn-A-Bike, Sheila Dooley of Pernet Family Health Service, and Anh Sawyer of Southeast Asian Coalition (SEAC).

A full list of questions we asked the nonprofits can be found in Appendix F. These interviews allowed us to compare the operations of ACE to those of other local nonprofit organizations. We prepared a spreadsheet with the information we gathered about the other nonprofit organizations for ACE to use to see different successful operating structures and choose what might be effective for them. The spread sheet of the nonprofit organizations can be found in Appendix G.

Section 3.3: Analyze Potential ACE Fundraising Campaigns

To help ACE choose specific fundraising campaigns to implement strategically our group created a document of strategically analyzed fundraising campaigns. We interviewed Mr. Le Boeuf about his recently implemented Annual Appeal to understand how ACE currently makes planning decisions for a fundraiser. We gathered potential fundraising ideas from ACE staff and Board through interviews and then compiled these ideas into one document strategically analyzing each of them using Stanford Research Institute's (SRI) NABC value proposition model.

Interviewing David Le Boeuf about Annual Appeal

In order to gain a better understand of how exactly ACE makes their fundraising decisions our team met with Mr. Le Boeuf. During the term of our project Mr. Le Boeuf implemented an Annual Appeal for ACE. An Annual Appeal is a fundraising practice done at the end of the year during the holiday season where a nonprofit will ask for donations due to the general increase in charitable donations that occurs during the holidays. By interviewing Mr. Le Boeuf, the driving force behind ACE's newly implemented Annual Appeal, our team learned about Mr. Le Boeuf's decision making process. We had originally expected to interview Mr. Le Boeuf about his plans for an upcoming Annual Appeal, but changed our method to interviewing him about the decisions he'd made when implementing the appeal when we'd found Mr. Le Boeuf had already implemented his idea.

Interviewing ACE staff and Board

When our group interviewed the ACE staff and Board about their fundraising goals, we also asked if they had any fundraising ideas they would like to see ACE implement. Because many staff and Board had ideas for fundraisers but little reason for why their idea would be strategic for ACE, we compiled all of the ideas that we gathered in our interviews into one document for ACE. We then evaluated each idea using SRI's NABC value proposition model.

Developing the NABC for each fundraising idea from staff and Board

A large concern ACE has when implementing any fundraising or marketing initiatives is the cost (both monetary and time) relative to the benefit. However, they do not currently have a standard process of assessing ideas for the benefit per cost. To show ACE how to strategically bring an idea from conception to a planned event, our group compiled each of ACE's staff and Board fundraising ideas into one document to strategically analyze. We first listed the needs ACE staff and Board had for fundraisers at the top of the document. A fundraising effort calendar also allows ACE to determine what their time-based needs are. Having ACE's needs listed at the top of the document would allow ACE to determine if a fundraiser's benefits aligned with ACE's needs. For each fundraising idea, we listed the needs of the 'customers' (if any) and the specific approach the staff or Board member had mentioned to fundraise. We analyzed the benefits per cost of each approach against the ACE and customer needs. This document allows ACE to strategically choose which fundraiser to implement by comparing different fundraising approach

benefits and cost to make a strategic decision on which fundraising approach to implement next. The list of analyzed fundraising campaigns can be found in Appendix H.

Section 3.4: Promote the implementation of our fundraising operations amongst the current ACE staff, volunteers and Board

Our groups last objective ensured that our groups findings and recommendations would be useful beneficial to ACE. To do this, we attended each staff and Board meeting to gather constructive feedback on our project. At the end of our project, we presented the value proposition method we'd researched to the ACE event staff and we presented our final deliverables to the ACE staff so they would know what we'd found and how to use our project deliverables.

Gathering constructive project feedback at ACE staff and Board meetings

Our group attended every ACE staff and Board meeting held during the course of our project to gather constructive feedback on the direction and accomplishments of our project. We arranged a five minute verbal update to present at each of these meetings and asked for specific feedback on our progress. We kept the staff and Board involved during the course of our project because we wanted to ensure that our project deliverables would be useful to ACE.

Presenting NABC to event staff

Once our group had developed an understanding of the NABC value proposition, we presented the idea to ACE's four main event staff, Ms. Connery, Mr. Le Boeuf, Ms. Kilgore, and Ms. Edwards. Because the ACE office does not have a projector, we created packets for the four staff to work through while we presented. During the presentations we discussed, what an NABC was, how to use an NABC and how the NABC format could be useful for them to make strategic decisions in the future. The materials we gave the staff can be found in Appendix I. After presenting, our group facilitated a discussion amongst the event staff to brainstorm ways they could see the NABC tool being used at ACE in the future. We facilitated this brainstorm so that the ACE staff would come up with ways to use our tool themselves hopefully solidifying the implementation of the tool at ACE.

Presenting final deliverables to all ACE staff

Once our group had completed all of our final deliverables, we presented our findings and recommendations to the ACE staff. We presented at the ACE office for one hour to ensure the

presentation was convenient for the ACE staff. The presentation focused on our findings and recommendations to help the staff understand how they could implement our recommendations. We presented the list of analyzed fundraising ideas and the operations manual we had compiled. We discussed our hopes for how ACE could use these deliverables and then prompted the staff to discuss how they feel the deliverable would be useful. Our group also wanted to ensure that our project findings and recommendations were available to all of the staff so that the information we produced would not be lost once delivered to ACE. We discussed with the ACE staff what would be the most effective storage method of our project and then ensured that we implemented the storage method after the presentation.

Chapter Four: Findings

The methods we used to complete our project objectives revealed several findings that contributed to the completion of our project goal; to develop and implement fundraising operations that would help to increase and stabilize their fund revenue. Our group compiled ten findings throughout our project. The findings uncovered related to the motivation of the staff, the funding priorities of ACE, intra-organizational communication, the roles definition amongst the staff and Board, and documentation.

We discuss in section 4.1 how the staff are motivated to work beyond their base-line employee obligations. In section 4.2, we discuss ACE's greatest funding need. Their greatest funding need is to increase their unrestricted funding. Regarding ACE's intra-organizational communication we compiled three findings in section 4.3. The first finding concerning intra-organizational communication is that Board members need a system of communication. The second finding is that there is a miscommunication of priorities from the Board to the staff and from the staff to the Board. The last finding related to intra-organizational communication relates to ACE's lack of hierarchical authority amongst the staff and Board. This lack of hierarchical authority results in reduced accountability amongst staff and Board. In section 4.4 we discuss the two findings related to role definition amongst the staff and the Board. The first of the findings related to role definition is that ACE has not defined clear staff roles related to fundraising. The second roles related finding is that ACE Board members do not all understand their role as a Board member of ACE. The last section, section 4.5 discusses the three findings related to ACE's documentation. The first documentation finding is that the operations of ACE's Fall Fundraiser and Spring Festival are poorly documented. The second documentation finding is that ACE does not have an efficient system to track their donors. The last documentation finding is that there is no system in ACE to document the planning of new fundraising initiatives. These findings helped our group develop the recommendations for ACE discussed in chapter five.

Section 4.1: ACE Staff Motivation

The ACE staff are motivated to work beyond their base-line employee obligations.

The staff of ACE support and strive to fulfill the mission of ACE. Many employees started as volunteers at ACE and became more involved because of their passion for ACE's mission. All of the staff that we interviewed had volunteered with ACE before they began working for ACE as part-time or full-time staff. These employees' passion to contribute more of their time to ACE shows through their willingness to work extra hours for no pay.

ACE has a limited budget to spend on employee salaries so ACE cannot pay employees to work overtime. Employees that work beyond their budgeted time at ACE know that they will go unpaid for their extra work. The employees who work overtime count the extra hours as volunteer hours. ACE pays their grant writer, Amy Corneliusen, to work 25 hours per week. Ms. Corneliusen often volunteers an extra 15 hours per week on top of her paid hours to write grants that help ACE stabilize their funding. In the same way, ACE pays their Marketing Coordinator, David Le Boeuf, to work five hours per week. After conducting a survey that determined how many hours each staff member contributed to marketing and fundraising efforts in any given week, we found that Mr. Le Boeuf contributed a total of seventeen hours each week for eight weeks prior to the Fall Fundraiser. As well, staff members volunteered hours to aid with ACE's fundraising and marketing efforts even when fundraising was not part of their explicit job description.

Before ACE's two largest events, the Fall Fundraiser and Spring Festival, we observed large spike in marketing and fundraising effort amongst the staff as seen in Figure 7. The spikes

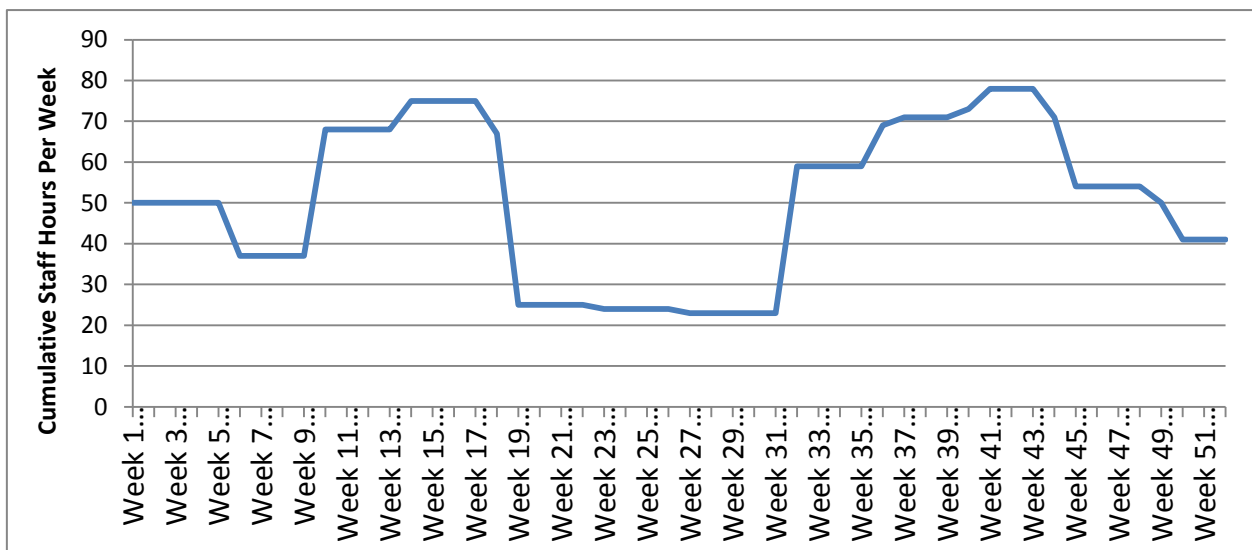


Figure 7: Total staff hours contributed towards fundraising and marketing efforts per week in 2012

indicate that ACE staff will work extra hours to achieve a short term goal that immediately benefits the program. The staff become excited to pursue opportunities that could benefit ACE, a driving force behind the program's success.

Section 4.2: ACE Funding Needs

ACE's greatest funding need is to increase their unrestricted funding.

We found that ACE needs to expand their unrestricted funding. The program faces a number of needs that could be filled through increased unrestricted funding. We discovered ACE's need for unrestricted funding during the course of our interviews with the staff and the Board.

During our group's initial interview with our sponsor, Amy Connery and Mr. Le Boeuf, we learned that ACE had recently lost funding for student transportation to and from the program. The funding had originally been contributed by the Worcester Public Schools. The Worcester Public Schools could no longer afford to donate transportation for ACE's students. ACE had to redistribute their funds from other program items to pay for the student's transportation. The program experienced budgeting stress due to the unexpected change. An increase of unrestricted funding would allow ACE to have funds set aside for unexpected budget changes. Our group heard of the transportation issue through our interviews with staff members, Ms. Connery, Mr. Le Boeuf, Kim Edwards, Saturday Program Coordinator, Julia Kilgore, Program Director, Kaska Yawo, Executive Director and Board member Molly Storer.

Another reason ACE requires unrestricted is due to the program's desire to hire their Executive Director, Mr. Yawo as a fulltime staff member. We learned about this desire from our interviews with Ms. Connery and Mr. Le Boeuf, Ms. Kilgore, Mr. Yawo himself and at the Board meeting we attended on November 4th, 2013. Currently, Mr. Yawo cannot work full time at ACE as the Executive Director because ACE does not provide healthcare to its employees. If ACE had more unrestricted funding to spend on employee benefits, a healthcare plan could be made available to its employees and Mr. Yawo could become a full time staff member.

Section 4.3: ACE's Intra-organizational Communication

ACE Board members need a system of communication to use amongst themselves.

The Board members of ACE struggle to communicate effectively amongst each other. We attended the Board meeting on December 4, 2013 where 6 Board members and 4 staff members discussed the Fall Fundraiser. They reflected on the successes and failures of the Fall Fundraiser at this meeting. Ms. Storer, first year Board member and University of Massachusetts Medical School Student, suggested that the Board develop a system so that any Board member may review an operations document for the Fall Fundraiser and know what they need to complete. She cited that she did not always know which tasks she should work on for the Fall Fundraiser. However, when we interviewed Olga Valdman, Co-Founder and Vice-Chair of the Board, we found that an operations system had been created for this purpose. The Board failed to implement their operations plan amongst the Board because not all of the Board was aware of the plan and only a few were involved while creating the plan.

Another indication that the Board needs an effective system of communication is that the new committee system implemented for the Fall Fundraiser was ineffective. The Board established a new committee system this year, for the organization of the Fall Fundraiser. The boundaries of the responsibilities of each committee were not clearly communicated to all Board members which resulted in some committees doing work that overlapped. Co-Founder and Vice-Chair, Ms. Valdman, claimed that there was miscommunication when reaching out to ACE's current donors to attend the Fall Fundraiser. The Board notified donors repeatedly about the Fall Fundraiser because the Board had not come to a consensus on whose responsibility it was to contact donors. Ms. Valdman fears that reaching out to donors more than once may hurt the number of active donors ACE has because certain donors may become irritated if they are contacted from the same organization repeatedly. While it is true that this committee system was a new concept implemented for the first time this year, if the Board had had better communication practices already in place the implementation may have succeeded without any issues arising.

The lack of communication amongst the Board became apparent to our group during the December 4th Board meeting when Mr. Le Boeuf indicated his frustration how, during the planning of the Fall Fundraiser, he would be asked the same question by multiple Board

members. Once one Board member received an answer, that Board member did not share that information with the rest of the Board. There was no communication between Board members of who should ask Mr. Le Boeuf a question that many Board members had. Board members would also contact the wrong person for the information they needed. The Board could improve communication amongst themselves.

There is a miscommunication of priorities from the Board to the staff and from the staff to the Board.

While the Board members had difficulties communicating amongst themselves, the staff and Board also had difficulties communicating effectively with each other. On our first day working at ACE, we learned about this lack of communication between the Board and the staff during our introductory interview with Ms. Connery and Mr. Le Boeuf. Mr. Le Boeuf stated that the Board and staff members have different viewpoints of where ACE should be and what is best for ACE. Mr. Le Boeuf feels the Board should be more responsible for fundraising than the staff. However, when we attended Board meetings, the Board indicated that keeping ACE in line with its mission was more important to them. It was clear to our group that the staff and Board have different expectations of each other's priorities.

Our group realized that the staff and Board didn't agree about each other's priorities when we talked to the staff and Board members separately about our project through interviews. The Board asked more general questions about the objective of our project and the overall goal that we would be achieving at the end of our time with ACE. The staff questioned us about specific results we found from our research and surveys. We observed that the Board looks at ACE from a more distant lens than the staff does. This meaning that the Board focuses on the "big picture" of ACE while the staff focuses on the details. Because of the difference of the Board and staff's view points, miscommunications arise between the staff and the Board.

During the November 4th Board meeting, Ms. Corneliussen and Mr. Yawo, gave the Board a presentation about the merits of a fee for service fundraising plan and a revised grant they had created. The Board had previously supported the grant in its early, developmental stages. When they presented the developed grant to the Board on the 4th, the Board felt that the grant did not align with ACE's mission. Mr. Yawo and Ms. Corneliussen did not receive support for their fee

for service plan for the same reason. The staff could not convince the Board to support their ideas because there is little communication of the Boards individual and group priorities for funding. The Board did not understand what the staff presented to them because they look at the presentations through a very different lens from the staff.

Another factor that contributes to the lack of communication between the staff and Board is the part-time status of Mr. Yawo. It is the role of the Executive Director to be the liaison between the staff and the Board, according to many of the staff of ACE. Because Mr. Yawo only works at ACE on a part-time basis, he is unable to fulfill that role effectively. The main source of communication between the staff and the Board is the Executive Director because, unlike the staff at ACE, he can sit in on Board meetings and communicate back to the staff about the discussion held during the Board meeting. He cannot always communicate everything that needs to be communicated because he does not work at ACE full time.

The Board and staff do not have a consistent, effective method of communication, but are working to remedy the issue. The Board has sent treasurer, Sandra Anim, to work on the finances of ACE with Ms. Kilgore. The staff and Board are aware of their miscommunication and are striving to eliminate this issue.

This lack of hierarchical authority in ACE results in reduced accountability amongst staff and Board.

During the second Board meeting, held on December 4, 2013 with 4 staff and 6 Board members present, the staff expressed that a difficulty they experienced during the planning and execution of the Fall Fundraiser was the lack of a clear chain of command. They felt a clear chain of command would be needed for effective communication and especially for accountability purposes. Ms. Valdman, also stated in her personal interview with us that there needs to be a clear leader for every aspect of ACE, including its fundraising and marketing events. With regards to the Fall Fundraiser, the staff was unsure of who had the authority to make certain decisions on the Board and did not know who to contact with different questions. In turn, the Board did not know who on the staff was working on the different parts of the fundraiser so the Board did not know who to contact for their questions either. This communication gap also made

it extremely difficult for the staff to hold the Board accountable for their work. A suggestion, by many staff and Board members, was that a clear document of operations or step by step process of certain events and projects may be able to eliminate their miscommunication.

Section 4.4: Role Definition Amongst the Staff and the Board

ACE has not defined clear staff roles related to fundraising

The ACE staff is made up of various positions including full time and part time employees, and interns. Many of the roles amongst the staff overlap when it comes to fundraising and marketing efforts because all of the staff contributes their time to these efforts but only Mr. Le Boeuf has any specific tasks to complete related to marketing and fundraising. Because of ACE's current organizational structure, there is minimal guidance on what exactly needs to be done for fundraising and marketing. Many of the singular fundraising and marketing tasks that the staff complete are completed more than once by different staff. Our group learned of the redundancy of task completion from our interview with Mr. Le Boeuf about his role as Marketing Coordinator.

Ms. Connery designed ACE's intern program so that the current interns of ACE work on a project for their time at ACE. Ms. Connery, stated that it would be effective and efficient to utilize these interns to complete larger projects that would benefit ACE long term. When we interviewed ACE's marketing intern, Juliette Coatsworth, she stated that there was not a specific project that she undertook, but a series of minor tasks that she completed. Ms. Coatsworth worked on minor tasks because these required less training of her, but the most effective use of an intern would be for longer projects. Not all of the staff understood Ms. Connery's definition of the intern program, so Ms. Coatsworth would be assigned smaller projects rather than be allowed to work on a larger project.

ACE Board members do not all understand their role as a Board member of ACE

The Board members are motivated to contribute more time to ACE. Some Board members do not know what tasks they could complete to contribute more time to ACE. When we interviewed the Board members, the majority of them claimed that they wanted to work more hours outside of the Board meetings but do not know how. Ms. Storer, stated that after the Fall Fundraiser she has not had any tasks to complete outside of Board meetings. She said that she would love to

donate one to two hours per week in regards to fundraising and marketing ACE if she knew what to do.

New Board members seem to have the most difficulty with determining and understanding their roles. The first year Board members, Josiah Bote, Ms. Storer, and Dennis Nyeayea, all agreed when we asked them about their role during the Board interviews, that they do not know exactly what their position is as a Board member. Ms. Storer stated that it would be helpful if there was a new Board member orientation to introduce them to ACE and their role as a Board member, including how the Fall Fundraiser is planned and executed, especially because the Fall Fundraiser is the responsibility of the Board. Mr. Nyeayea started on the Board in 2006 when ACE first started. He discontinued 5 months ago and was recently called back. When asked what his current role as a Board member was he answered that he was unsure of his role. He, like Ms. Storer, claims that he would be able to devote more time to ACE if he knew what was expected of him.

Section 4.5: ACE's Documentation

The operations of ACE's Fall Fundraiser are poorly documented

As our project progressed, we began learning more the operations that the staff and Board employed when planning for the Fall Fundraiser. The Fall Fundraiser is the largest source of unrestricted funding that ACE has to date. The Fall Fundraiser falls under the Board's assigned responsibilities and they carry the majority of the responsibilities of planning and executing the event. In addition to these duties, the Board must also populate the event with guests. Board members are responsible for soliciting the event. This event has been held three times to date, and has undergone many improvements with each successive year.

With each Board member we interviewed, it became clearer that the veterans of the organization had a solid idea of the event, how to plan for it, who to contact, and what to do the day of the event. The information that was necessary to planning was not always written down in a place that was available for all Board members to access, and if it was, there was no single, complete document with all of the event's operations information. While interviewing newer Board members who had never worked on the fundraiser before we learned they were uncertain about their responsibilities for the planning the event. They also did not know what to do the day of the

event. As a result of not knowing what to do, more responsibilities fell to other Board members who knew the necessary tasks that needed to be done.

We also found that there was unreliable documentation of donations made on the day of the Fall Fundraiser. The event attendance system was inefficient as well. Without whole records of donations and attendees, ACE had no record of who donated what and why, nor who attended.

ACE does not have an efficient system to track their donors

Through the Fall Fundraiser, Spring Festival, and through other fundraising and marketing efforts, ACE has many avenues for donors to donate through. Unfortunately, information of each donor is not compiled into one database. At the beginning of our project, we viewed ACE's current donor database. ACE had three donor databases which causes much disorganization and confusion when it comes to reaching out to its donors. There was no way of knowing which donors have already been contacted or which donors needed some type of follow up for a fundraising initiative. Ms. Valdman, explained to our team that she feels ACE should have one list of every donor that ACE current has including how they are connected to ACE. She suggested that any Board or staff member should easily be able to access and update the database when necessary. In addition, each donor would have the information that would identify the donor as someone that has just been invited to the Fall Fundraiser or has just donated to ACE. The staff of ACE are currently striving to gather information about their donor base by conducting an annual appeal to every donor (an appeal that they donate to ACE sent out once a year to all donors). Mr. Le Boeuf, who is in charge of the annual appeal, hopes that this annual appeal will attract ACE's current donors and help to reveal the active donors on ACE's current donor database. To document his findings, however, a single database with all of ACE's donor information needs creation.

There is no system in ACE to document the planning of new fundraising initiatives

The ACE staff and Board begin to plan new ideas without having a systematic approach to how new fundraising should be implemented. It is important that when they choose a fundraiser to pursue, they document the reasoning for all of the decisions they have made throughout the process so that they will know they've chosen the best fundraiser to pursue at the time for their needs. Board member and medical school student, Andrea Posa, finds it extremely important to have documentation of the planning of any fundraising initiative that ACE would like to pursue

in order to increase the level of success each following year. Towards the beginning of December, the staff decided they wanted to implement an annual appeal because they wanted to take advantage of the holiday season and wanted to test who in their donor base would donate to an annual appeal. The annual appeal was implemented within two weeks of the idea's conception. When our group interviewed Mr. Le Boeuf, to discuss his decision process for implementing the annual appeal, we found that he did have a reason for each decision he made with the annual appeal but he had not documented these decisions because he did not think to document very small decisions he made like choosing what website to host the annual appeal or why he chose to email a link to a website instead of a direct pdf. When repeating a fundraiser or explaining the fundraisers to other staff, without documentation, it is difficult to understand the past operations and step by step processes that were made the first time.

ACE does not keep a compilation of fundraising ideas that have emerged from various staff and Board members. In the beginning of the term we interviewed the staff and found there was no list of potential fundraisers when almost all staff and Board members had fundraising ideas. At the end of the term we found that a fundraiser was implemented without strategic planning. ACE staff did not document their decision making for implementing the annual appeal.

ACE staff become excited about a new fundraising idea if the idea is novel, or if the staff and organization have the resources to implement the new idea. When our group did staff interviews at the beginning of our project, many staff members were eager to suggest fundraising ideas that they had thought of pursuing at some point. When the staff described their fundraising ideas, the most common reason why they wanted to do a fundraiser was the novelty of the idea. The second reason why we found staff wanted to implement a fundraiser was because they had the necessary resources to implement it immediately. Mr. Le Boeuf implemented his idea of an ad book at the Fall Fundraiser because he had specific experience doing ad books and he knew he could bring in profit. He did not document his decision making process for the ad book because he already knew how to make the ad book. Documenting the decision making process would make it more efficient if he or anyone else were to create an ad book in the future. Due to Mr. Le Boeuf's personal fundraising and marketing experiences, he knew he could bring in profit with his fundraising idea and knew the process of completing it. However, the fact that Mr. Le Boeuf used his personal experience to implement the fundraiser and called on his personal connections

(mainly, his background is in politics so he was able to interest politicians in the Fall Fundraiser) showed us that in the event if Mr. Le Boeuf were to no longer work at ACE, the staff may not be able to create an ad book again. If Mr. Le Boeuf could document his system for creating the ad book and why he made the specific ad book decisions he made, ACE may be able to implement the ad book for any future Marketing Coordinator.

Mr. Yawo, wanted to implement a corporate sponsorship with local colleges because he had connections with the colleges and because colleges were more likely to be sympathetic with ACE's educational mission. He could use the resources he already had and he also thought of the alignment of potential stakeholders. There was no analysis of profitability of a corporate sponsorship. From our interviews, many staff members had different understandings of what "Corporate Sponsorship" meant. Ms. Kilgore considered connecting with small businesses in the area a corporate sponsorship while Mr. Le Boeuf considered it to be developing relationships with large corporations for specific resources. It was clear to us, by talking to the different staff and Board members individually that there was no single consensus on the idea of 'corporate sponsorship'. The lack of consensus indicates a lack of documentation of decision making for what Mr. Yawo's original idea was.

Chapter Five: Recommendations

Our student project group devised seven recommendations for the African Community Education (ACE) program to improve their fundraising operations. The seven recommendations we devised are for ACE to:

1. Use the ACE mission as a marketing tool
2. Improve the donor database organization
3. Develop and implement a yearly Board orientation
4. Have both staff and Board represented at staff and Board meetings
5. Use Ticketleap.com to organize event attendance and ticket sales
6. Use NABC value proposition the list of fundraising ideas we compiled to strategize new fundraising events
7. Utilize and improve upon the operations plan for the Fall Fundraiser we developed

The following chapter details the recommendations listed above.

Use the ACE mission as a marketing tool

Our student group recommends that ACE use their mission as a marketing tool. The mission of ACE is extremely impactful and can be utilized a marketing tool. The program is very skilled at portraying their mission and working with the students so we suggest they use this skill to market themselves to potential donors.

Improve the donor database organization

Another recommendation is for ACE to update its current donor database. The database should be organized so that anyone can use the database to look up what each donor has donated, when they were last contacted, which events they have attended, and which staff or Board member contacted them first. The database should be accessible to all ACE staff and Board. The program should also develop a system to ensure that the system is updated regularly.

Develop and implement a yearly Board orientation

We recommend the ACE Board hold a Board member orientation after new members join each year. The purpose of this orientation would be to teach new Board members about ACE and the

obligations of a Board member. Ideally staff would be a part of this orientation so they can understand the priorities of the Board. The orientation could also be used to develop a system of communication that all Board members would subscribe to.

Have both staff and Board represented at staff and Board meetings

We recommend that a staff member attend each Board meeting and that a Board member attend each staff meeting. Because Board meetings only happen once a month it is important that the staff be able to represent themselves at the Board meetings to keep the Board up to date with the status of the program. Having staff present at all Board meetings will also enable communication around ACE's events like the Fall Fundraiser and the Spring Festival. By attending each other's meetings, the staff and Board will be able to collaborate on event planning. Keeping the Board involved with the ACE staff will also help Board members understand staff priorities. To make this feasible for Board members we recommend a different Board member attend each staff meeting.

Use Ticketleap.com to organize event attendance and ticket sales

We recommend that when selling tickets to the Fall Fundraiser ACE use a program called ticketleap.com. This website allows the user to create an event and multiple selling accounts. All transactions can be recorded in the program so that the ticket purchasers' information (name, address, contact information) can all be stored in the same place location. There are no charges when selling tickets with cash and the user can even specify what denominations of bills were used to pay for the ticket(s). There is a small 3% charge for credit card use, which is lower than their current service, eventbrite.com. Eventbrite.com has a 3% credit card fee on top of their 2.5% + \$0.99 per ticket service fee. Using ticket leap has two distinct advantages for ACE, beyond its better pricing. By having multiple selling accounts each Board member can have their own account which will show exactly how many tickets they have sold and how much money they have made for the organization. Ticketleap.com is a great tool for tracking all income on a single platform. As ticketleap.com requires the user to input the purchaser's contact information it can be used to not only contact attendees after the event with a follow up or thank you, but it can be used to check individuals into the event once they get there. Ticketleap.com could help ACE document their event attendance.

Use NABC value proposition the list of fundraising ideas we compiled to strategize new fundraising events

Our group recommends a documentation process called the NABC to strategically plan fundraisers and to help determine stakeholder priorities. The NABC considers four aspects of a project: the need, the approach, the benefits per cost and the competition (Carlson & Wilmot, 2006). It is a tool designed to help with gathering concrete direction to take on a new idea and to help gain support from important stakeholders (Carlson & Wilmot, 2006).

The NABC model will help ACE plan for new fundraisers. For each stakeholder in a project, ACE staff will need to create a new NABC. This will help them identify the specific direction they will take for a project. If a staff member asks down the line, “Why did we make this decision instead of doing this?” They will be able to look back at the past NABCs for that event and understand that the decision was made to fill a specific need that may have changed over the years.

The NABC will also help staff communicate with the Board members more effectively by considering the Boards view point. The NABC is a powerful tool of persuasion. With the NABC, the ACE staff will be able to document and understand the Board’s needs or priorities and develop approaches that fit the Board’s needs as well as their own.

To help ACE understand how the NABC works for some fundraisers, our group has developed NABCs the staff’s fundraising ideas. The document we compiled contains rudimentary NABCs that the ACE staff and Board should use to quickly define which fundraisers to implement. Once the staff and Board have settled on a fundraiser to implement, they should work with each other to develop a more detailed NABC to come up with specific tasks that need to be accomplished.

Our group hopes that the NABC will be a useful tool to document planning, improve communication between the Board and the staff and to create strategic direction for ACE’s fundraising.

Utilize and improve upon the operations plan for the Fall Fundraiser we developed

We recommend that ACE utilize the operations plan that we have developed for them. The plan details the tasks associated with the Fall Fundraiser, as well as the different roles and positions that should be taken on during the execution of the event. These operations create clearly defined

roles and the responsibilities associated with each role. This will prevent overlap between the roles and create a clear chain of command so that everybody involved knows who to contact for the information they need.

Our group does realize that there are many aspects of the Fall Fundraiser that we were unable to document ourselves, so we recommend that the ACE staff and Board build upon the operations we have created so that they may include any details we missed or overlooked. The ACE staff and Board have a much more detailed knowledge of their events than we do and will be able to turn the operations we developed into something much more useful.

Chapter Six: Conclusion

From the conclusion of our project, ACE should have the necessary training and materials to take the first step to start creating and implementing a strategic fundraising plan. We hope that ACE will make informed choices when deciding on which campaigns and projects to invest time into and they will use systemized operations to implement these campaigns and projects. Our group will come back to ACE in April of 2014 (four months after our project has completed) and see if our processes and systems were useful to them and help them solve any unresolved questions we may have left behind.

For future projects with WPI or other independent researchers we advise that ACE use these groups to work to build upon the foundations our group has set for the strategic fundraising plan. This could mean setting long-term strategic goals and helping ACE plan out how they will achieve these goals. It could also mean helping staff work through the short term operations of implementing and documenting a fundraiser.

Our group hopes that in the end, our project will spark the initiative to move ACE towards thinking about strategic planning in all of the decisions they make for their organization. Once ACE thinks of decisions in terms of the overall strategy they serve to pursue, they will be on the right track to obtain stable funding and expand their program in new and exciting directions.

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Appendices

Appendix A: Interview Questions for ACE Staff

Preamble

We are a group of student researchers from Worcester Polytechnic Institute. We are working closely with African Community Education (ACE) to create a new marketing plan to increase ACE's income revenue by expanding their sources of revenue. With the information gathered from this interview, we will be able to identify ACE's strengths, the extent of its influence, and ways to increase community awareness about the services ACE provides. Your participation in this interview is completely voluntary and at any time if you wish to stop, we can conclude the interview. If you prefer, personal information such as names will not appear on record, nor will they be recorded and reproduced in the resulting data analysis. If you are interested, a copy of our results can be provided at the conclusion of our study. Thank you.

- Age
- County (area of MA.)
- How long have you been affiliated with ACE?
- What influenced you to volunteer your time at ACE?
- Do you volunteer/work at other local nonprofits?
- How long have you worked with nonprofits.
- What has your experience at ACE been like?
- Do you have any fundraising ideas for ACE to implement in the future?
- What do you know of ACE's current goals for the future?
- What methods do you know of that ACE markets to the Worcester community, the African community and to donors?

Appendix B: Interview Questions for Board Members

Preamble

We are a group of student researchers from Worcester Polytechnic Institute. We are working in collaboration with the African Community Education Program (ACE) to create a new marketing plan to increase and expand ACE's sources of revenue. We are interviewing Board Members to gain a better understanding of ACE's history, its goals, and the opinions of some of the primary stakeholders of the organization. This printout is to alert you to some of the information we are looking to learn. Some questions will be expanded upon during the actual interview. Your participation would be greatly appreciated as this interview is completely voluntary. Your answers will remain completely anonymous: no names or identifying information will appear on the questionnaires or in any part of our group's project reports or publications. If you are interested, a copy of our results can be provided at the conclusion of the study. Thank you.

- How and when did you become involved with ACE? Why did you get involved with ACE?
- How did you become involved with the Board of Directors? Is this the first Board you have been a part of?
- Do you have a role in ACE outside of the Board? If so, what is it?
- What are some of your responsibilities as a Board member?
- What role do you feel you have as a Board member? Consider your role, the responsibilities it entails and whether you feel these are in accord)
- What are your thoughts on ACE's current position?
- Financially?
- Direction of the program?
- What are some of your goals for ACE?
- Concerning fundraising, what are some of the methods you have seen ACE employ? Consider past events' strengths and weaknesses, and ways for improvement)
- What are the biggest (funding, marketing) challenges ACE currently faces?
- What are some of the strategies being employed to address ACE's most pressing challenges?

- Do you have any strategic ideas for marketing that you would like to see from us?

Appendix C: List of Staff Fundraising Hour Survey Questions

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Qualtrics Survey Software

Default Question Block

What is your name and job title?

On average, how many hours, not including time spent on events, do you spend on marketing or fundraising each week?

(This can include social media use, updating the website, emailing contacts, presenting about ACE, etc.)

	1 Hour	2 Hours	3 Hours	4 Hours	5 Hours	6 Hours	7 Hours	8 Hours	9 Hours	10 Hours	11 Hours	12 Hours	N/A
January	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
February	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
March	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
April	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
May	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
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July	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
August	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
September	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
October	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
November	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
December	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Regarding the Fall Fundraiser, how many hours per week did you spend advertising, promoting and working on the event in August and September?

- 1 hour
- 2 hours
- 3 hours
- 4 hours
- 5 hours
- 6 hours
- 7 hours
- 8 hours
- 9 hours
- 10 hours
- 11 hours
- 12 hours
- If more than 12 hours, how many?
- N/A

Regarding the Fall Fundraiser, how many hours per week did you spend advertising, promoting and working on the event in October?

- 1 hour
- 2 hours
- 3 hours
- 4 hours
- 8 hours
- 9 hours
- 10 hours
- 11 hours

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Qualtrics Survey Software

- 5 hours
- 6 hours
- 7 hours

- 12 hours
- If more than 12 hours, how many?
- N/A

When did you begin working on the Fall Fundraiser?

Regarding the Spring Festival, how many hours per week did you spend advertising, promoting and working on the event from December to February?

- 1 hour
- 2 hours
- 3 hours
- 4 hours
- 5 hours
- 6 hours
- 7 hours

- 8 hours
- 9 hours
- 10 hours
- 11 hours
- 12 hours
- If more than 12 hours, how many?
- N/A

Regarding the Spring Festival, how many hours per week did you spend advertising, promoting and working on the event in March and April?

- 1 hour
- 2 hours
- 3 hours
- 4 hours
- 5 hours
- 6 hours
- 7 hours

- 8 hours
- 9 hours
- 10 hours
- 11 hours
- 12 hours
- If more than 12 hours, how many?
- N/A

When did you begin working on the Spring Festival?

Ideally, how much time would you like/be willing to spend on marketing and fundraising initiatives each week?

	1 Hour	2 Hours	3 Hours	4 Hours	5 Hours	6 Hours	7 Hours	8 Hours	9 Hours	10 Hours	11 Hours	12 Hours	N/A
January	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
February	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

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March	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
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June	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
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August	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
September	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
October	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
November	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
December	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

When are some of your busiest times of the year?

Appendix D: Operations Manual

Overall Descriptions

Annual Fall Fundraiser Dinner: The Board's Annual Fall Fundraiser Dinner serves as the main fundraiser for the African Community Education (ACE) program. In the past three years it has taken place in late October, and this document is based on that timeline. Deadlines can be adjusted once the date for the event has been cemented. Every year, current and potential donors from the Worcester Community are invited to participate in this event. During this event donors experience African culture including dancing, drumming, and food. Generally there are a number of small fundraising events that take place within the Fundraiser. Examples of past events include a silent and live auction. In addition to the cultural performances and fundraisers, student speakers are a staple of the event. This is the time for the impact of ACE on its students to shine through. Donors are able to better understand our mission and how we are fulfilling our role in the community.

This document is intended to help guide anyone person through the process of the Fall Fundraiser. Included in this document are *suggested* meeting times, a timeline of tasks that need to be completed, an overall calendar of tasks and meetings, and an appendix with the Fall Fundraiser's 2013 data. Feel free to add or adjust anything that is needed in order to keep an updated documentation of the Fall Fundraiser. Throughout the document, there will be references to *past* Fall Fundraiser's to be able to compare what was done in previous years. Also, in each timeline, the weeks/months prior to the Fall Fundraiser are the starting points of the tasks.

Meeting Times

To begin planning for the Fall Fundraiser (run by the Fall Fundraising Event Chairs) an initial meeting needs to occur between the board and staff members **16-17 weeks before the Fall Fundraiser.**

- During this meeting these topics need to be addressed:
 - The date of the Fall Fundraiser
 - The venue of the Fall Fundraiser
 - The chairs and program liaisons assignments
 - Descriptions of the roles
 - Expectations of the roles
 - Expectations of each board member (*Fall Fundraiser 2013*- each board member was responsible for selling at least one table worth of tickets)
 - Hold board members accountable: What if board member does not sell the expected amount of tickets?
 - Review this document to start planning now until the end of the Fall Fundraiser

After the initial meeting, **bi-weekly** meetings need to occur up until 8 weeks prior of the Fall Fundraiser. Eight weeks prior to the Fall Fundraiser there needs to be **weekly** meetings***.

During the bi-weekly and weekly meetings these topics need to be addressed:

- What has been completed
- What was supposed to be completed
- Goals for the time period before the next meeting
- These are the meetings to reach out and *ask for help* if needed to the Event Chair!

***If it is not feasible to meet this often, the Event Chair is to keep continuous communication with each chair and program liaison to answer address the topics above.

After the Fall Fundraiser, there will be a post meeting within 2 weeks after the event. If the next board meeting falls under this two week mark, this could be the meeting time. If the next board meeting does not fall under these two weeks, or another topic is being covered during the board meeting, an additional time for this meeting needs to occur.

During the post Fall Fundraiser these topics need to be addressed:

- Money put into fundraiser and money raised (ticket sales, donations, auction sells etc.)
- Attendance of the Fall Fundraiser
- Reflection of the fundraiser (what went well, what needs to be improved etc.)

Fall Fundraiser Chairs and Program Liaisons

The purpose of the board chairs is to give each board member autonomy over a specific section of the Fall Fundraiser. The chair will have the ability to delegate certain responsibilities to other board members, as well as their program liaison. The program liaison is the board member's go to person for information about what the ACE program already has to offer. The program liaison is a source of knowledge for their assigned board member. Board, when you are searching for knowledge, be sure to utilize your program liaison. They are there for a reason.

Communication: It is important that the chair(s) and program liaisons are in constant communication with each other. It is suggested that each chair and program liaison meet with each other bi-weekly or weekly prior to the Fall Fundraiser. However, the board and staff members are extremely busy and an email or telephone "check-ins" will suffice.

Chair Positions

Overview

Fall Fundraising Tasks (2013)

Event Chair (2 Board Chairs 1 Program Liaison)

- **Past Chair:** Andrea Posa, andrea.posa@umassmed.edu; Sandra Anim, anim.sandra@gmail.com
- **Past Program Liaison:** Kaska Yawo, kyawo@acechildren.org

Decoration, Food & Music Chair (1 Board Chairs 1 Program Liaison)

- **Past Chair:** Sandra Anim, anim.sandra@gmail.com
- **Past Program Liaison:** Amy Connery, aconnery@acechildren.org
- **Past Other:** Dennis responsible for music only; Sandra, Marshall can help with set-up day of event

Fundraising and Corporate Sponsorship Chair (2 Board Chairs 1 Program Liaison)

- **Past Chairs:** Molly Storer, Molly.storer@umassmed.edu; Marshall Gaye, marshallgaye@gmail.com
- **Past Program Liaison:** Julia Kilgore, jkilgore@acechildren.org
- **Past Other:** Danielle - writing

Media and PR Chair (1 Board Chairs 1 Program Liaison)

- **Past Chair:** Josiah Bote, Josiah.bote@umassemed.edu
- **Past Program Liaison:** David Leboeuf, dleboeuf@acechildren.org
- **Past Other:** Danielle -writing

Program & Event Staff Chair (1 Board Chairs 1 Program Liaison)

- **Past Chair:** Toy Lim, toyl@hotmail.com
- **Past Program Liaison:** Kim Edwards, kedwards@acechildren.org

Invitation, Ticket, Special Guest, & Thank You Chair (1 Board Chairs 1 Program Liaison)

- **Past Chair:** Olga Valdman, olenka43@gmail.com
- **Past Program Liaison:** Julia Kilgore, jkilgore@acechildren.org
- **Past Other:** Kaska –special guests, Danielle invitations phrasing

Event Chair (2 Board Members, Program Liaison)

The purpose of the Event Chair (EC) is to oversee the Fall Fundraiser at large and coordinate with the chairs of the 5 committees. The EC assigns board members to committees as well as a staff member as a resource for program based information and divides tasks in an organized fashion. The EC needs to check-in regularly with each chair to make sure that they are on schedule, answer questions and assist if there are problems. The EC creates the theme for the fundraiser as well as drafts the budget. Other responsibilities include big picture items such as:

- Finalizing the venue, date, time
- Overseeing the budget, approving requests from committee chairs
- Choosing a “theme” for the event
 - For example, “The proceeds from year’s Fall Fundraiser will benefit the _____ (mentorship program, transportation, etc.) and our goal is _____ (eg \$13,000) to buy bus passes for the year.”
 - In the past, we have not had a specific fundraising theme.
- Approve “big picture” plans
 - For example, general feel of the event (how fancy?), how many guests, what are the major pieces of the event (e.g. alcohol cash bar, yes or no? live vs silent auction, yes or no?), how to sell tickets (e.g. online for a fee, yes or no?). **Most of these plans will be made by the committee chairs and presented to the EC for discussion/approval.**

Timeline

5 months before event (~16-18 weeks before):

- Research and organize venue, date and time prior to initial board meeting
- Initial Board Meeting:
- One half to three quarters of this board meeting should be led by the Event Chair.
 - *Prior to the meeting*, the EC should review roles and responsibilities for each committee and have an understanding of the budget for each committee.
 - *During this meeting*, the EC should bring printed copies of written responsibilities for each committee.
 - *Chair committees* should be assigned (volunteered) and the roles should be divided and reviewed explicitly.
 - The EC should layout the timeline of tasks for every board member, and the meeting should end with a plan for follow-up and next steps.

14 weeks before event:

- Contact venue for finalization of venue, date and time
- Review budget for each committee
 - Send via email or meet individually with each chair to review their budget for the Fall Fundraiser.
- Begin check-in with committee chairs *every 2 weeks* (eg phone, email, etc). Help reassign tasks, trouble shoot, provide structure/guidance as necessary. Make sure to end each check-in with a clear set of expectations for what should be done next and a deadline.

6-7 weeks before event:

- Begin check-in with committee chairs *every week*. Same as above. The EC is responsible for figuring out which committee chairs need help and how to help.
 - This could mean taking on tasks yourself or finding other people to assist including other board members, staff, volunteers, etc.
- Keep a master to-do list for the event and make sure someone is assigned to each task

1-2 weeks before event:

- Iron out remaining details. (This will be a very time-consuming week, because there will be lots of last-minute things that come up and need to be arranged)
- At this point, everyone should be helping with everything they can (regardless of chair committee)
 - Examples from the past of last-minute include: getting borrowed tablecloths donated, arranging rides for students/volunteers for the day-of, making sure facilities management/janitorial services and clean-up plan is set up with the venue, gathering last-minute auction items, etc. These are just examples, but the point is that this week we need “all hands on deck” and the EC is responsible for coordinating the last minute miscellaneous tasks that tend to arise unexpectedly.

Day of event:

- Oversee the event. Ideally, everyone should have specific day-of tasks according to their committee chair roles.
- Help with setup/cleanup, make sure things go smoothly, greet guests, and socialize with guests during the event.

Make Sure To:

- Lay out expectations ***VERY*** clearly for each board member
- Have a clear sense of the budget, what has been done in the past
- Keep clear communication lines between the program liaisons and board members
- Keep close tabs on each individual board member and make sure they are meeting deadlines and asking for help when they need it

Useful Contacts:

- (*Past*) Event Chairs- Andrea Posa: Andrea.Posa@gmail.com; Sandra Anim: anim.sandra@gmail.com
- (*Past*) Program Liaison- Kaska Yawo, kyawo@acechildren.org
- UMASS Venue
 - To reserve a room, a UMASS student/faculty must email: roomreservations@umassmed.edu, 508-856-2264. Rooms we have used in the past were “Faculty Conference Room” (2011, 2012) and “LRB Blais Pavillion” (2013). These rooms book out months in advance, so reserve as early as possible. (free)

- Helga.Frohn@sodexo.com- to set up bartender (charges a fee, which has not been waved in the past), tablecloths, plastic-ware (donated/borrowed). She works for Sodexo, which is one of UMASS' catering companies
- Anthony.Covello@umassmed.edu- supervisor of environmental building services. He can coordinate set-up, tables/chairs, equipment, clean-up, podium. (charges a fee, which has been waived in the past)
- av@umassmed.edu- Audiovisual department to set up audiovisual equipment eg. microphones, speakers, slide show projector and screen, etc. (free)

Food, Entertainment, and Decoration Chair (2 Board Chairs, 1 Program Liaison)

The purpose of the Food, Entertainment, and Decoration Chair(s) (FEDC) is to handle all logistics concerning food, decorations and music for the day of the event. The FEDC must design the aesthetic of the event based on the theme, as well as procure all items necessary to decorate with. The FEDC must design the centerpiece. Catering is handled by the FEDC. In the past Edwina has been contracted catered the event. If planning on using a different caterer, make sure to contact them at the time catering decision has been made. The FEDC must operate on the most minimum budget possible, so it is strongly suggested to start the process early, and to look for possible donations of needed items.

Timeline

As soon as possible (3-6 months in advance)

- Food Check:
- Determine caterer.
 - Try to establish relationship; trade ad book space in exchange for services etc. *\$200 spent last year for food.*
 - Edwina or outside person.
 - Ghanaian - Anokye-krom.
 - African - Elder Paintsil's African Restaurant.
 - Kenyan – Safari Café.
 - (<http://africandinner.com/restaurants-by-state/massachusetts/>)
- If going with an outside caterer, decide the date of the event, and then book caterer for that day.
 - Create menu and settle all details with caterer

15 weeks before event:

- Decoration Check:
- Communicate with Event Chair concerning theme and decorations.
 - Make sure everyone is on the same page for theme for the event.
- Food Check:
- Have catering settled.
 - Outside Caterer: menu and date should be booked already.
 - Edwina, decide on:
 - Date, Menu, Quantity, Price.
 - Consider ordering more food than what you think is necessary.
 - Decide if Edwina is catering dessert as well.
- Food Check:
- Contact Gold Coast Catering for dinnerware donations (plates, chargers and cutlery).
 - Offer Ad Book space.
- Entertainment Check:
- Decide on music choices.
 - DJ or self-made playlist.
 - Cost of DJ \$200-\$500.
 - If DJ is picked, look into DJ's that might work at a reduced rate or free for a charitable event.

- Book DJ.

12 weeks before event

- Decoration Check:
- Layout organization of hall.
 - Consider: dining location, food location, performance, auction items and entrance/exits.
- Decoration Check:
- Decide on items needed for decoration.
 - Check list of donated items from last year.
 - Check list of staff that donated items.
 - Contact program staff that donated items for previous events.
- Decoration Check:
- Design Centerpiece.
 - List necessary components for centerpiece.

10 weeks before event

- Food Check:
- Edwina Check #1.
 - Make sure the date is still confirmed.
 - Make sure she is not double booked.

6 weeks before event

- Food Check:
- Edwina Check #2.
 - Confirm date and food options.
- Decoration Check:
- Have all decoration items necessary.
- Entertainment Check:
- DJ Check #1. (If you decide on a DJ).
 - Make sure DJ is still booked for day of event.

2 weeks before event

- Food Check:
- Edwina Check #3.
 - Confirm all details (amount of food, what time the event begins).
- Event Check:
- Create volunteer roles for day of event.
 - Positions: set up, take down, volunteer DJ, serve food.
 - Contact Volunteer Coordinator and Program and Event Staff Chair for number of volunteers needed to help set up and take down day of event.

1 week before event

- Entertainment Chair:
- Coordinate with Program and Event Staff Chair (PC) concerning music for performance.
 - Create playlist for day of event.
 - If hired a DJ, confirm time with DJ.
- Food Check:
- Edwina Check #4.
 - Confirm last minute details.

Day of event:

- Event Check:
- Review volunteer roles with volunteers prior to start of event.
- Food Check:
- Help caterer with anything they need.
- Entertainment Check:
- Set up all speaker systems, set playlist
- Decoration Check:
- Set up and clean-up of event. Make sure to have enough volunteers to help.

Make Sure To:

- Check in on Edwina to make sure everything runs smoothly this year.
- Keep the total amount spent under \$500.
- Always look out for ways to get donations or reduced prices.
- Document all new processes.
- Meet, call, or email on a bi-weekly basis, or when needed, with the program liaison to make sure things on the staff side are running smoothly.

Useful Contacts:

- (Past) Chair: Sandra Anim, anim.sandra@gmail.com
- (Past) Program Liaison and Volunteer Coordinator: Amy Connery, aconnery@acechildren.org
- (Past) Program and Event Staff Chair Toy Lim: toyL@hotmail.com | 857-928-3690
- Edwina
- Gold Coast Catering [508-926-8438](tel:508-926-8438)

Fundraising and Corporate Sponsor Chair (2 Board Chairs, 1 Program Liaison)

The purpose of the Fundraising Chair (FC) is to develop and manage all fundraising initiatives that take place within the Fundraiser. In the past, the smaller fundraising events that take place during the Fall Fundraiser included 2 different forms of auctions and the creation of an ad booklet. Below is the process for creating both the silent and live auctions. The process will be different if a different fundraiser is chosen for the Fall Fundraiser. Make sure to document any new fundraising ideas that are carried out.

Timeline

When event is created (~ 15 weeks prior)

- Fundraising Check :
- Decide the small fundraisers that will take place during the event.
 - In the case of a new fundraiser:
 - In the case of implementing a new fundraiser, use the NABC approach to determine viability of fundraiser.
 - If the fundraiser is deemed cost effective, list the necessary components of the fundraiser.
 - Create a timeline to complete the components of the new fundraiser.
 - Be sure to document everything, so that the fundraiser can be redone at future Fall Fundraisers/events.
 - Create a draft agenda for fundraiser.
 - Include approximate times for each agenda item.
 - Send draft agenda to the Event Chair for review.
- Sponsor Check:
- Begin researching local business that might be interested in supporting the fundraiser.
 - Highlight that corporations can buy tables.
 - Coordinate with Invitation, Ticket, Special Guest and Thank you Chair.
 - Create contact list for all potential businesses.
- Ad Book Check:
- Create Google Doc- list of business that needs to be solicited for this event.
 - Divide the number of business and assign each board member a number that they need to contact and solicit ads from.
- Auction Check:
- Decide the items we want for the silent and live auctions.
 - Draft a list of potential organizations that have these items.
 - See **Appendix A** for more information of past year auctions.
 - Includes: organization, contact information, item donated.

13 weeks before event:

- Sponsor Check:
- Follow up #1 with companies, check to see if they are interested in donating towards the event either in the form of:
 - Buying a table.
 - Donating item to auction.
 - Donating a service (food, dinnerware, etc.).
 - Donating to the event cost.
 - Donating to ACE.
- Sponsor Check:
- Mark all parties that have:

- Been successfully contacted.
- Donated in some form.
- Have had no response from.
- Auction Check:
 - Mark all parties that have:
 - Been successfully contacted.
 - Donated item.
 - Donated in another form.
 - Have had no response from.
- Ad Book Check:
- Send letters or meet with companies to solicit ads (see **Appendix B** for previous solicitation letter).
 - Reach out to:
 - Companies, businesses, politicians, labor unions.
- Auction Check:
- Create a Google Doc for current auction items.
 - Include:
 - Item description.
 - Value.
 - Suggested price.
 - Donor contact information.
 - ACE member who solicited item.

10 weeks before event:

- Ad Book Check: Create a rough draft of the ad booklet pages.
 - Include corporate ads.
 - Listed auction items.
- Sponsor Check: Follow up #2 contact corporations/local businesses again.
 - Update list of corporations.

6 weeks before event:

- Ad Book Check: Layout current corporate ads. Send document to Program and Event. Staff Chair so that they may be laid out with the rest of the program booklet.
- Sponsor Check: make sure Google Doc has been updated.
- Fundraising Check: Check on all board members that they have solicited the businesses given to them in week 16.
- **Follow up with all corporations, businesses and companies.**

3 week before event:

- **Follow up with all corporations, businesses, companies.**
- **Follow up that board members have contacted all businesses.**
- **Update all documentation.**
 - Auction items.
 - Business, corporations, companies contacted.
 - For Ad Booklet, donations, etc.

2 weeks before event:

- Ad Book Check: Send final compilation of ads to Program and Event Staff Chair so that program booklet can be printed.

1 week before event:

- Auction Check:
 - Collect auction items.
 - Print auction item bidding sheets.
 - Send Marianne Feliz list of items (can share Google Doc).
 - Make a list of duties for volunteers to help with auction. Give this to Program and Event Staff Chair.

Day of event:

- Auction Check: Check in with Marianne Feliz to go over auction item.
- Auction Check: Bring auction items to venue and set up auction display with bidding sheets.

Make Sure To:

- Check in on each board member, ensuring they are contacting the proper number of businesses.
- Meet, call, or email on a bi-weekly basis, or when needed, with the program liaison to make sure things on the staff side are running smoothly.

Documents:

At the start of the planning period you can decide if you want these documents to be mutually exclusive or not.

- List of Ad Book companies.
- List of corporations .
- List of those who donated to Auction.

Useful Contacts:

- See **Appendix A** for contact information of previous companies that have donated auction items
- see **Appendix B** for previous solicitation letter
- (Past) Maker of 2013 Fall Fundraiser Ad Booklet David LeBoeuf
- Marianne Feliz
- (Past) Program Chair Toy Lim toyL@hotmail.com | 857-928-3690
- (Past) Chair Molly.Storer@Umassmed.edu | 508-277-5206; Marshall Gaye, marshallgaye@gmail.com
- (Past) Program Liaison: Julia Kilgore, jkilgore@acechildren.org

Media and Public Relations Chair (1 Board Chair, 1 Program Liaison)

The purpose of the Media and Public Relations Chair is to develop and execute methods of marketing and publicizing the Fall Fundraiser to the Worcester Community.

Timeline

REMEMBER: ALL PUBLICITY FOR THE EVENT MUST BE APPROVED BY UMASS PUBLIC AFFAIRS- Phone: 508-856-2000, PublicAffairs&Publications@umassmed.edu

11 weeks before event:

- Media and Public Relations Chair, Board and Program Liaison, meet with each other to create a plan for advertising the Fall Fundraiser.
 - Identify & utilize promotion outlets (email blasts, Facebook, radio, TV, UMass Medical School connections, college/university connections, churches through Kaska Yawo, etc.).

9 weeks before event:

- Advertising Check:
 - Create Facebook event page and invite people. Communicate this to all staff and board members to invite everyone they know.
 - Coordinate with Invitation, Ticket, Special Guests and Thank You Chair to make sure all details are in this event page.
 - Create poster for Fall Fundraiser.
 - Get poster approved by board members.

8 weeks before event:

- Advertising Check:
 - UMassMedNow now article.
 - Sandra Gray (sandra.gray@umassmed.edu) - wrote the article in UMassMedNow.
 - Local newspaper article/advertisement.
 - Email current ACE donors, past attendees of Fall Fundraiser, etc.

7 weeks before event:

- Advertising Check:
 - Post event posters in public places such as schools and churches.
 - Write press releases.

5 weeks before event:

- Advertising Check:
 - Local radio interview and announcement.
 - Dr. Satya Mitra (satya@thegurutax.com) - has a radio show at WTAG AM 580 Worcester.
 - Email the UMass community at large.

3 week before event:

- Advertising Check:

- Follow up email with ACE donors and past Fall Fundraiser attendees.
- Post reminders on Facebook event page.

1 week before event:

- Advertising Check:
 - Post final reminders on Facebook event page.

Day of event:

- Media Check: Take pictures and video of the event during the entire event.

Make Sure To:

- Meet, call, or email on a bi-weekly basis, or when needed, with the program liaison to make sure things on the staff side are running smoothly.

Useful Contacts:

- (*Past*) Media and Public Relations Chair – Josiah Bote: Josiah.bote@umassemed.edu
- (*Past*) Media and Public Relations Chair Program Liaison- David LeBoeuf: dleboeuf@acechildren.org
- Dr. Satya Mitra (satya@thegurutax.com) - has a radio show at WTAG AM 580 Worcester

Program and Event Staff Chair (1 Board Chair, 1 Program Liaison)

The purpose of the Program and Event Staff Chair (PC) is to develop the event program, which includes the agenda for the day of the Fundraiser that lists the speakers and performers. The PC must coordinate the process of organizing the performance and speech. Process includes choosing student performers and speakers, organizing a routine and speech, ensuring students practice performance pieces and finally orchestrating the performances the day of the event. The planning for the student performances can start in September, once the students have started school. The PC is also responsible for organizing and printing the agenda for the event.

Timeline

7 weeks before event:

- Program Check:
- Create a draft paper program for fundraiser. Include approximate times for each item.
 - Coordinate with Fundraising and Corporate Sponsor Chair to add corporate ads, auction items.
 - Send draft agenda to the Event Chair for review.
- Performance Check:
- Meet with ACE staff to identify:
 - Event chair of the performances
 - Student chair (Program liaison can appoint a student for this position)
 - Student performers
 - Speakers, dancers, drummers, etc.

5 weeks before event:

- Performance Check:
 - Staff has coordinated rehearsal for dance performance.
 - Coach (staff or volunteer) for student speaker prepare the speech has been chosen and informed of responsibilities and timeline that student speaker must be on.

4 week before event:

- Performance Check:
- Written student speech completed. Student speaker begins practicing speech with volunteer assistance.
- Performance Check:
- Program liaison and student chair meet to discuss roles and shared responsibilities.
- Event Check:
- Draft a list of duties and positions that are necessary for the day of the event.
 - Example volunteers positions:
 - Ticket Sales
 - Greeters
 - Cash Box
 - Auction
 - Servers
- Event Check:
- Create slideshow for event.
 - Include pictures, video clips, quotes that illustrate our mission and the positive impact we are having in the lives of our students.

2 weeks before event:

- Program Check:
- Finalize program with names of speakers, performers, corporate ads, auction items.
 - Coordinate with Fundraising and Corporate Sponsor Chair on the ads that need to be included in the program booklet.
- Program Check:
- Coordinate program printing with ACE staff
- Performance Check:
- Email Volunteer Coordinator to arrange for rides for student speaker, performers and chairperson
- Event Check:
- Contact Volunteer Coordinator to enlist volunteers for day of the event
 - Make sure all volunteers save the date
 - Communicate with Volunteer Coordinator on day-of volunteer
 - Coordinate with Food, Entertainment, and Decoration and their volunteers

1 week before event:

- Event Check:
- Create playlist for event:
 - Music for performances.
 - Ambient music for rest of the event.
 - Ensure slideshow is polished and ready to go.
 - Coordinate with Food, Entertainment, and Decoration Chair concerning music for performance.
- Event Check: Contact volunteers reminding them of the upcoming event.
 - Give specific jobs to volunteers.

Day of event:

- Event Check:
- Review volunteer roles with volunteers prior to start of event.
- Performance Check:
Bring extra copies of music and program.
- Performance Check:
- Assist with dance performances, student speaker and chairs as needed.

Make Sure To:

- Meet, call, or email on a bi-weekly basis, or when needed, with the program liaison to make sure things on the staff side are running smoothly.
- Train volunteers on needed duties for the Fall Fundraiser so it is a smooth and hassle free process.
Contact Volunteer Coordinator for volunteers needed for event.

Useful Contacts:

- (Past) Volunteer Coordinator: Amy Connery: aconnery@acechildren.org
- (Past) Media Chair: Josiah Bote: Josiah.bote@umassemed.edu
- (Past) Chair: Toy Lim: toyl@hotmail.com
- (Past) Program Liaison: Kim Edwards: kedwards@acechildren.org

Invitation, Ticket, Special Guest and Thank You Chair (2 Board Chair, 1 Program Liaison)

The Invitation, Ticket, Special Guest and Thank You Chair is responsible for invitations and personal appeals to special guests. Most importantly, this chair is responsible for gathering all of the attendees and donors of the Fall Fundraiser and sending them follow up thank you emails or letters.

Timeline

11 weeks before event:

- Guests Check: Gather a list of contacts to invite.
 - Reach out to board members and staff for more contacts.
 - Donor database.

10 weeks before event:

- Guests Check:
 - Organize final list of contacts to invite.
 - Develops/executes a plan for the best way to invite each guest.
 - For example, who gets snail mail invitations (try to keep this list to a minimum and include a personal message so money is not wasted on postage), who gets email blasts, phone calls etc.

9 weeks before event:

- Invitations Check:
 - Designs and sends out invitations/Save the Date.
 - Creates a list of special guests to follow up with regularly on a personal basis (or is responsible for ensuring follow up by whichever board member is most appropriate).
- Tickets Check:
 - Organizes a plan to accept money for ticket purchases, donations, etc.
 - For example, ACE website, 3rd party vendor, etc.
 - Work with program liaison for this.
 - *Last year*, we used Eventbrite.com which had fee per ticket.
 - Look into Ticket Leap, which charges a low fee and organizes sales info.
 - Coordinate with Media and Public Relations Chair with the ticket information.

4 weeks before event:

- Tickets Check:
 - Follow up with invited guests (email, phone, etc.)

2 weeks before event:

- Tickets Check:
 - Need processes for collecting tickets in advance- physical vs digital.
 - Day of tickets- cash vs check vs credit card.
 - Needs a designated phone for credit card swipe.
 - Create master list of the expected attendees of the Fall Fundraiser.
- Invitation Check:
 - Email final reminder to all expected attendees of the Fall Fundraiser.

Day of event:

- *Ticket Sales:* Appoint and train someone (Program liaison, staff, or volunteer) to organize ticket sales at the door, keeps track of donations/contact information of donors for next year. Donations include the money raised from the raffle and auction.

After the Fall Fundraiser:**1 week after the Fall Fundraiser**

- Compile a list of all the attendees and donors of the Fall Fundraiser.

2 weeks after the Fall Fundraiser

- Create thank you letter.
 - Decide if the thank you letter will be given via email or letter.
 - It is to your discretion if there will be different thank you letters for people who attended, who donated and who purchased auction items/raffle.

3 weeks after the Fall Fundraiser

- Send out all of the thank you letters.

Make Sure To:

- Meet, call, email on a weekly basis, or when needed, with the Program Liaison to make sure things on the staff side are running smoothly.

Useful Contacts:

- (Past) Chair – Olga Valdman: olenka43@gmail.com
- (Past) Program Liaison – Julia Kilgore: jkilgore@acechildren.org

Overall Calendar

Date (weeks before event)	Chair	Event	Communication
18	Event Chair	<u>Venue Check:</u> Research possibilities. Decide on date and location. <u>Board Meeting:</u> A board meeting should be called; covering committee responsibilities.	All Chairs
16	Event Chair	<u>Venue Check:</u> Finalize date time. <u>Budget Check:</u> Review budget with each committee.	
	Food, Entertainment, and Decoration	<u>Food Check:</u> Determine caterer.	
15	Fundraising and Corporate Sponsorship	<u>Fundraising Check:</u> Decide the type of smaller fundraisers to hold at event. <u>Sponsor Check:</u> Begin researching local business that might be interested in. <u>Ad Book Check:</u> Create Google Doc list of business that need to be contacted. <u>Auction Check:</u> Decide items for auction. List, proper tag.	Coordinate with Invitation, Ticket, Special Guest and Thank you Chair for possible ticket sales through businesses.
	Food, Entertainment, and Decoration	<u>Food Check:</u> Have catering settled. Contact Gold Coast Catering for dinnerware donations (plates, chargers and cutlery). <u>Entertainment Check:</u> Decide on music choices.(DJ or Ipod)	Communicate with Event Chair concerning theme and decorations.

13	Fundraising and Corporate Sponsorship	<p><u>Sponsor Check:</u> Follow up with companies.</p> <p><u>Ad Book Check:</u> Send letters/ Meet with companies to solicit Ads.</p> <p><u>Auction Check:</u> Create Google Doc for current items. See manual for details to include.</p>	
12	Food, Entertainment, and Decoration	<p><u>Decoration Check:</u> Layout organization of hall. Decide on items needed for decoration. Design Centerpiece.</p>	Contact program staff and board that donated items for previous events
11	Media and PR	Identify & utilize promotion outlets (email blasts, Facebook, radio, TV, etc.)	
	Invitation, Ticket, Special Guest and Thank You	<p><u>Guests Check:</u> Gather a list of contacts to invite.</p> <ul style="list-style-type: none"> • Reach out to board members and staff for more contacts. • Donor database. 	
10	Fundraising and Corporate Sponsorship	<p><u>Ad Book Check:</u> Create a rough draft of the ad booklet pages.</p> <p><u>Sponsor Check:</u> Follow up #2 contact corporations/local businesses again.</p>	
	Invitation, Ticket, Special Guest and Thank You	<p><u>Invitation and Ticket Check:</u> Organize final list of contacts to invite. Develops/executes a plan for the best way to invite each guest.</p>	
	Food, Entertainment, and Decoration	<p><u>Food Check:</u> Edwina Check #1.</p>	
9	Media and PR	<p><u>Advertising Check:</u> Create Facebook event page and invite people. Communicate this to all staff and board members to invite everyone they know. Create poster for Fall Fundraiser. Get poster approved by board members.</p>	Invitation, Ticket, Special Guests and Thank You Chair to make sure all details are in this event page

	Invitation, Ticket, Special Guest and Thank You	<p><u>Invitations Check:</u> Designs and sends out invitations/Save the Date. Creates a list of special guests to follow up with regularly on a personal basis</p> <p><u>Tickets Check:</u> Organizes a plan to accept money for ticket purchases, donations, etc.</p>	Coordinate with Media and Public Relations Chair with the ticket information.
8	Media and PR	<p><u>Advertising Check:</u> UMassMedNow now article. Local newspaper article/advertisement. Email current ACE donors, past attendees of Fall Fundraiser, etc.</p>	Invitation, Ticket, Special Guests and Thank You Chair to make sure all details are in this event page
7	Media and PR	<p><u>Advertising Check:</u> Post event posters in public places such as schools and churches. Write press releases.</p>	
	Program and Event Staff	<p><u>Program Check:</u> Create a draft paper program for fundraiser. Include approximate times for each item. Meet with ACE staff to identify:</p> <ul style="list-style-type: none"> • Event chair of the performances. • Student chair (Program liaison can appoint a student for this position) <p>Student performers (Speakers, dancers, drummers, etc.)</p>	Coordinate with Fundraising and Corporate Sponsor Chair to add corporate ads, auction items.
		•	
6	Event Chair	<p><u>Meeting Check:</u> Make sure to meet/update each other on weekly basis.</p>	All Chairs
	Fundraising and Corporate Sponsorship	<p><u>Ad Book Check:</u> Layout current corporate ads.</p> <p><u>Sponsor Check:</u> Make sure Google Doc has been updated.</p> <p><u>Fundraising Check:</u> Check on all board members that they have solicited the businesses given to them in week 16. Follow up with all corporations, businesses and companies.</p>	Send document to Program and Event Staff Chair so that they may be laid out with the rest of the program booklet.
	Food, Entertainment,	<u>Food Check:</u>	Reach out to staff and

	and Decoration	Edwina Check #2 (Confirm date and food options.) <u>Decoration Check:</u> Have all decoration items necessary. <u>Entertainment Check:</u> DJ Check #1. (If you decide on a DJ).	board for decorations
5	Media and PR	<u>Advertising Check:</u> Local radio interview and announcement. Email the UMass community at large.	
	Program and Event Staff	<u>Performance and Event Check:</u> Staff has coordinated rehearsal for dance performance. Coach (staff or volunteer) for student speaker prepare the speech has been chosen and informed of responsibilities and timeline that student speaker must be on.	
4	Program and Event Staff	<u>Performance Check:</u> Written student speech completed. Student speaker begins practicing speech with volunteer assistance. Program liaison and student chair meet to discuss roles and shared responsibilities. <u>Event Check:</u> Draft a list of duties and positions that are necessary for the day of the event. <ul style="list-style-type: none"> ○ Example volunteers positions: <ul style="list-style-type: none"> ▪ Ticket Sales ▪ Greeters ▪ Cash Box ▪ Auction ▪ Servers Create slideshow for event.	
	Invitation, Ticket, Special Guests and Thank You	<u>Tickets Check:</u> Follow up with invited guests (email, phone, etc.)	
3	Fundraising and Corporate Sponsorship	<u>Ad Booklet Check:</u> Follow up with all corporations, businesses, companies. Follow up that board members have contacted all businesses. Update all documentation.	

	Media and PR	<u>Advertising Check:</u> Follow up email with ACE donors and past Fall Fundraiser attendees. Post reminders on Facebook event page.	
2	Fundraising and Corporate Sponsorship	<u>Ad Booklet Check:</u> Create final compilation of the ads for the ad booklet.	Send final compilation of ads to Program and Event Staff Chair so that program booklet can be printed
	Program and Event Staff	<u>Program Check:</u> Finalize program with names of speakers, performers, corporate ads, auction items. Coordinate program printing with ACE staff <u>Event Check:</u> Email Volunteer Coordinator to arrange for rides for student speaker, performers and chairperson Contact Volunteer Coordinator to enlist volunteers for day of the event <ul style="list-style-type: none"> ○ Make sure all volunteers save the date 	Coordinate with Fundraising and Corporate Sponsor Chair on the ads that need to be included in the program booklet. Communicate with Volunteer Coordinator on day-of volunteer Coordinate with Food, Entertainment, and Decoration and their volunteers
	Invitation, Ticket, Special Guests and Thank You	<u>Tickets Check:</u> Need processes for collecting tickets in advance- physical vs digital. Day of tickets- cash vs check vs credit card. Needs a designated phone for credit card swipe. Create master list of the expected attendees of the Fall Fundraiser. <u>Invitation Check:</u> Email final reminder to all expected attendees of the Fall Fundraiser.	
	Food, Entertainment, and Decoration	<u>Food Check:</u> Edwina Check #3; Confirm all details (amount of food, what time the event begins). <u>Event Check:</u> Create volunteer roles for day of event.	Coordinate with Volunteer Coordinator and Program and Event Staff Chair for volunteers

1	Event Chair	<u>Chair and Program Liaison Check:</u> Make sure everyone is completing their tasks. Offer assistance where necessary.	Meet with all Chairs and Program Liaisons
	Fundraising and Corporate Sponsorship	<u>Auction Check:</u> Collect auction items. Print auction item bidding sheets. Send Marianne Feliz list of items. Make a list of duties for volunteers to help with auction.	Give the list of duties to the Program and Event Staff Chair
	Media and PR	<u>Advertising Check:</u> Post final reminders on Facebook event page and other means of social media.	
	Program and Event Staff	<u>Event Check:</u> Create playlist for event: <ul style="list-style-type: none"> • Music for performances. • Ambient music for rest of the event. • Ensure slideshow is polished and ready to go. Contact volunteers reminding them of the upcoming event	Coordinate with Food, Entertainment, and Decoration Chair concerning music for performance.
	Food, Entertainment, and Decoration	<u>Entertainment Chair:</u> Create playlist for day of event. If hired a DJ, confirm time with DJ. <u>Food Check:</u> Edwina Check #4. (Confirm last minute details.)	Coordinate with Program and Event Staff Chair concerning music for performance.
Day Of	Event Chair	<u>Event Check:</u> Oversee event. Help set up/cleanup. Host.	
	Fundraising and Corporate Sponsorship	<u>Auction Check :</u> Check in with Marianne Feliz to go over auction item. Bring auction items to venue and set up auction display with bidding sheets.	
	Media and PR	<u>Media Check:</u> Take pictures and video of the event during the entire event.	
	Program and Event Staff	<u>Event Check:</u> Review volunteer roles with volunteers prior to start of event. <u>Performance Check:</u> Bring extra copies of music and program. <u>Performance Check:</u> Assist with dance performances, student speaker and chairs as needed.	

	<p>Invitation, Ticket, Special Guests and Thank You</p>	<p><u><i>Ticket Sales:</i></u> Appoint and train someone (Program liaison, staff, or volunteer) to organize ticket sales at the door, keeps track of donations/contact information of donors for next year. Donations include the money raised from the raffle and auction.</p>	
	<p>Food, Entertainment, and Decoration</p>	<p><u><i>Event Check:</i></u> Review volunteer roles with volunteers prior to start of event. <u><i>Food Check:</i></u> Help caterer with anything they need. <u><i>Entertainment Check:</i></u> Set up all speaker systems, set playlist. <u><i>Decoration Check:</i></u> Set up and clean-up of event. Make sure to have enough volunteers to help.</p>	

Auction Item Contacts

Item Type	Committee Member	Status: Confirmed ?	Item	Value	Donor	Donor Contact/Email	Description
Jewelry	Molly Storer	Confirmed*	Wrap Bracelet from Cameron Farkas Designs	50	Cami Farkas	cami.farkas@gmail.com	
Food	Molly Storer	Confirmed*	Trader Joes Gift Basket	35	Trader Joes	Trader Joes Shrewsbury, 77 Boston Turnpike Shrewsbury, MA 01545	
Woven Basket and Coasters	Andrea Posa	Confirmed-Marshall	Woven grass basket, 2 woven grass coasters	Suggested starting bid: \$75 (for all 3 items, or split them into raffle/auction)	Andrea Posa	andrea.posa@gmail.com	Hand-woven grass baskets made by a group of Senegalese artisan women trying to start their own small businesses through the ___???Ten Thousand Villages Project (Marshall- can you please edit this description according to the info sheet I gave you with the items? Thanks!)
African Mask	Andrea Posa	Confirmed-Marshall	Small wooden painted Kenyan mask of a Massai warrior	Suggested starting bid: \$30	Andrea Posa	andrea.posa@gmail.com	Small wooden mask from Kenya, painted in traditional tones depicting a Massai warrior (Andrea has a photo of the lady selling her wares)
African Bowl	Andrea Posa	Confirmed-Marshall	Decorative wooden bowl with animal-themed stand	Suggested starting bid: \$70	Andrea Posa	andrea.posa@gmail.com	A decorative wooden bowl made in Kenya with a creative 3-legged stand, each leg representing a different African animal- giraffe, leopard and _____. Perfect for a table centerpiece or to hold treats for guests
Wine	Kim	Confirmed-ACE tomorrow	Wine Baskets (2)	\$80 each	Kim Edwards	kedwards@acechildren.org	
Tickets	Julia Kilgore	Confirmed-ACE tomorrow	Family pack to Ecotarium (2)	\$44 each	Ecotarium	ask the program	

Art	Olga/Andrea	Confirmed (at Andrea's house)	2 Framed batiks from Kenyan village market, framed in bright plastic frames (red and blue, medium sized)	Approximate cost: \$10 Starting suggested bid: \$60 each	Dr. Ann Moormann (UMASS)	Ann.Moormann@umass med.edu	Red frame (batik 1): 3 warrior men and their leader gathered with spears, jugs and supplies, perhaps going out for a hunt below their village. Blue frame (batik 2): two cloaked men with their long-horned animals, perhaps cattlemen pointing in the distance with a setting/rising sun
Art	Olga/Andrea	Confirmed (at Andrea's house)	2 Framed batiks from Kenyan village market, framed in large dark and light wood frames (the largest)	Starting suggested bid: \$100 each	Dr. Ann Moormann (UMASS)	Ann.Moormann@umass med.edu	Dark frame (batik 3): 6 colorfully dressed Kenyan village women carrying water jugs atop their heads Light wood frame (batik 4): women gathered along the palm trees at the river bank to collect water. One woman holds a baby strapped to her back. The village can be seen in the background
Art	Olga/Andrea	Confirmed (at Andrea's house)	1 small framed batik from Kenyan village market in a donated metal frame	Starting suggested bid: \$40	Dr. Ann Moormann (UMASS)	Ann.Moormann@umass med.edu	Batik 5: A family of 4 walking towards their village carrying bundles and jugs atop their heads. Baby strapped to mother's back on the left.
Art	Olga/Andrea	Confirmed (at Andrea's house)	Unframed Kenyan batiks- 4 large and 1 small long rectangular	Suggested price: \$30/large, \$20/rectangle	Dr. Ann Moormann (UMASS)	Ann.Moormann@umass med.edu	I suggest these are sold separately after the event at a fixed price unless there is a ton of interest in the 5 framed batiks during the auction and it seems like the audience wants more
Art	Andrea Posa	Confirmed (at Andrea's house)	Professionally framed watercolor painting	Value: \$300 Suggested starting bid: \$175	Yvonne Posa	ycposa@gmail.com	Blue hydrangea flowers painted by Yvonne Posa, a watercolor artist who has won several awards for her work at shows across New England
Jewelry	Olga/Andrea	Confirmed (at Andrea's house)	Many pieces of Kenyan jewelry	varies	Dr. Ann Moormann (UMASS)	Ann.Moormann@umass med.edu	-*Earrings 1: wire bicycles -*Earrings 2: wire men -Earrings 3: brown and white

house)

swirled glass (2 pairs)
-*Earrings 4: long colorful strings of beads
-Bracelets 1: leather with white and colored Indian beads (3)
-*Bracelet 2: multiple colorful strings of beads (matches Earrings 4)
-*Bracelet 3: thick colorful bracelet with 3 rows of glass beads set in tiny Indian beads
-*Bracelet 4: thick, lime green, black and metal beads
-*Bracelet 5: Camel bone bracelets. 2 very thick bracelets with 8 rows of dark brown beads and note regarding camel brown: "Hand-carved and etched in Sub-Saharan Africa, camel bone is believed to bring great luck by desert tribes as it is their only means of sustenance in the desert" (2)
-*Bracelet 6: Amber bracelet. 3 bright orange beads with a note regarding amber: "A fossilized resin, Amber is among the oldest substance used for adornments. In Africa, it was a symbol of family wealth and status. Amber has been surrounded by mystery for thousands of years and is believed to have magical and medicinal properties. It is said that Amber regulates body temperatures and cures many ailments. Amber varies in color from yellowish to reddish black."
-Bracelet 7: two rows of brown and white beads made of straw or

							<p>grass</p> <ul style="list-style-type: none"> -Bracelet 8: very small, thin bracelet with brown/white grass/straw beads and colorful Indian beads -Necklaces 1: made of colorful twisted paper beads (2 short, 1 long) -Necklace 2: brown, metal and black beads on a wire with triangle center bead -*Necklace 3: three large curled flat metal pieces with black and brown beads -*Keychain 1: two strings of colorful glass beads
Art	Olga/Andrea	Confirmed (at Andrea's house)	Wooden statue from Liberia	Suggested starting bid: \$35	Dr. Trish McQuilkin	patricia.mcquilkin@umasmed.edu	Small, slender, elegant wooden carving of a lady carrying a jug atop her head, holding up her "lapa" wrap skirt to keep it out of the dirt
African clothing	Olga/Andrea	Confirmed (at Andrea's house)	Traditional man's shirt from Liberia	Suggested starting bid: \$25	Dr. Trish McQuilkin	patricia.mcquilkin@umasmed.edu	Traditional Liberian men's tie-dye shirt, dark green with decorative gold pattern
Fabric	Olga/Andrea	Confirmed (at Andrea's house)	Raw fabric from Liberia	Suggested starting bid: \$15	Dr. Trish McQuilkin	patricia.mcquilkin@umasmed.edu	Traditional Liberian printed cloth-dark purple with blue and orange. Unfinished cloth that can be used for many purposes- household decoration, sewn into clothing, beach wrap, picnic blanket, etc.
Cafe Gift Certificate	Andrea Posa	Confirmed-Olga (4x 10\$)	Nu Cafe gift certificates	4 x 10\$	Josh (Nu Cafe owner)	josh@nucafe.com, 335 Chandler St, Worcester, MA 01602	Nu Cafe is a popular, friendly spot for delicious drinks and snacks with the freshest ingredients! Fruit smoothies, coffee, salads, wraps, sandwiches and more! Nu Cafe is a gathering place for the local community to relax, meet a friend and enjoy wonderful, healthy and fresh offerings. During the day, the

							place is full of people using the free Wi-Fi, having meetings, or just relaxing and reading a book. At night it turns into a hip restaurant with a full wait staff and an after 5PM menu featuring local and craft beers and wine. 335 Chandler St., Worcester.
Art	Olga/Andrea	Confirmed (at Andrea's house)	Large acrylic painting, framed (?Liberia)	Suggested starting bid: ?	Dr. Trish McQuilkin	patricia.mcquilkin@umasmed.edu	2 African ladies carrying jugs on their heads towards palm trees
Gift Card	?	Confirmed	\$25 gift card to Flying Rhino			-ask the program	
Restaurant Gift Card	?	Received-at program	\$50 (x2) O'Connors			-ask the program	
		Julia- silent	Lindt Chocolate basekt			-ask the program	
		Andrea's house. LIVE	Stevan Ridley football		The Patriots	-ask Molly	
		Andrea's house.	\$20 gift card to Boynton			Jayson Hawley The Boynton 117 Highland St. Worcester, MA 01609	

Ad Booklet Letter

Dear Community Partner,

I would like to take this moment to share with you an exciting opportunity to get involved with African Community Education Program's new corporate sponsorship program. The ACE Program has been serving the African refugee and immigrant community of Worcester since 2006, providing critical educational and support services to students and families. With the support of our sponsors, ACE has already helped graduate many students from high school, most who are now attending college and moving ever closer to the dreams they brought with them when they first came to this country.

Although we have already seen the positive impact of ACE programs in the Worcester community there is still much more work to be done. The numbers of children needing our help continue to grow and in turn our need for teachers grows with them. By purchasing an advertisement in our Fall Fundraiser program, you will have the opportunity to engage with a vibrant and growing community organization. Not only will your support demonstrate to your customers and community how much you care about the success of their youth, but it will also contribute to the future of our collective community through the education and empowerment of many generations to come.

Every contribution large and small makes a difference, so today, I invite you to partner with us in our charge to help the African refugee and immigrant children of our community achieve their dreams.

We look forward to working with you to improve the lives of the children and families we serve.

Sincerely,

ADVERTISING OPPORTUNITIES

Event Program

Size	Rate
Premier Sponsor- BEST VALUE Full Page Ad and Table at the Event (8 tickets)	\$500
Full Page	\$200
Half Page	\$120
Quarter Page	\$80

FALL FUNDRAISER SPONSORSHIP
Thursday October 24th, 6:00pm-8:00pm
Faculty Conference Room, UMass Medical School

Name: _____

Organization: _____

Address: _____

Phone Number: _____

Email: _____

__ Premier Sponsor- BEST VALUE One Full Page Advertisement and Table at the Event (8 tickets) **\$500**

- I would like to donate _____ tickets back to the organization
- I would like _____ additional tickets for the event

__ Full Page Advertisement \$200

__ Half Page Advertisement \$120

__ Quarter Page Advertisement \$800

__ I would like to purchase _____ tickets to the Fall Fundraiser (\$50 each)

__ I would like to make a donation of _____ towards the event

Please make all checks payable to

African Community Education Program
24 Chatham Street
Worcester, MA 01608

Please submit all advertisements to dleboeuf@acechildren.org before _____.

If you have any questions please call our office at 508-799-365

Appendix E: Interview Questions for Local Worcester Nonprofit Organizations

- How do you fundraise?
- How often do you hold fundraising events?
- How much revenue do your various fundraisers usually generate?
- What are the breakdown of your sources of revenue?
- Do you feel like you have diversified sources of funding?
 - If so, why?
 - How did you diversify?
- What is the cost of running your organization?
- Do you feel your organization is financially stable?
 - If so why?
 - How did you gain it?
- What are some of the steps you are taking to ensure financial stability?
- Does your organization work with local or corporate businesses?
 - If so, how did you develop this relationship?
- How is your organization structured?
 - What are some positions within your organization?
 - Do staff work outside of their roles on other tasks?
- Does your organization have a Board?
 - What is their purpose?
 - Do they help fundraise?
 - If so, do they work with the org staff?

Appendix F: Interview Questions for Local Worcester Nonprofit Organizations

- How do you fundraise?
- How often do you hold fundraising events?
- How much revenue do your various fundraisers usually generate?
- What are the breakdown of your sources of revenue?
- Do you feel like you have diversified sources of funding?
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 - Do staff work outside of their roles on other tasks?
- Does your organization have a Board?
 - What is their purpose?
 - Do they help fundraise?
 - If so, do they work with the org staff?

Appendix G: Nonprofit Organization Spreadsheet

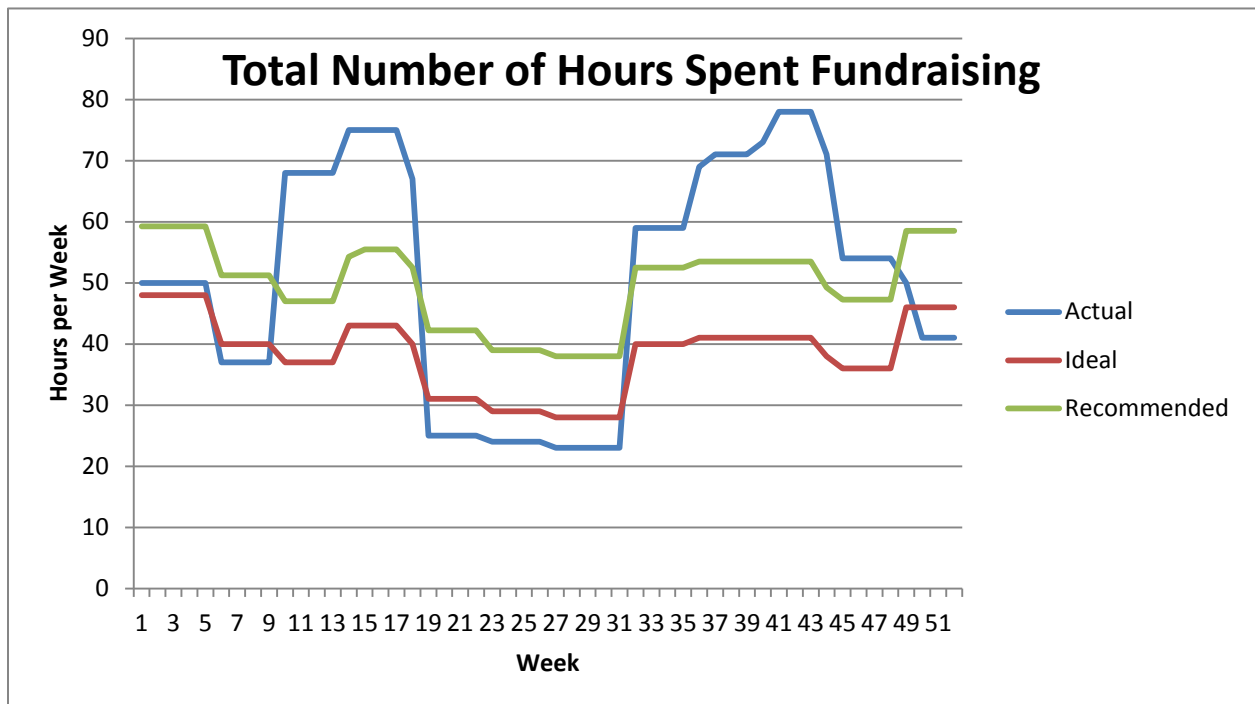
Organization	Staff	Volunteers	Age	How they are organized?	Board	Suggestions	Sources of Revenue
AIDS Project Worcester	12	lots of med school/hospital volunteers	1987	<ul style="list-style-type: none"> •still in process •Use database for annual appeals 	primary job is fiscal health of the agency; marketing and networking	Research on corporations that have become involved in nonprofits like ACE; form committees; constant contact using e-newsletter	•Mass. Dep of Health; grants
Earn A Bike	<ul style="list-style-type: none"> •all staff are volunteers • No one is paid 	A lot	2000	<ul style="list-style-type: none"> •All equal • all titles functional •shop managers controls their tasks • no paid positions •many marketing and fundraising events •strong connections with colleges and trying to get more 	n/a	n/a	<ul style="list-style-type: none"> •donation of bikes •buys materials from local bike shops
Pernet Family Health Care	27	200	1970	Facebook everyday, donate button on the website and FB; have a FR director; do not have a business plan; difficulties on communication lines		n/a	

CHAPA	12	1967	Variety of funding revenue; need better organization	<ul style="list-style-type: none"> •Very large Board (54) o all meet quarterly • executive committee meets more frequently o they are focused on policy and governance 	n/a	<ul style="list-style-type: none"> •private donations •membership dues •grants, Gov't, State, Foundation •annual fundraising dinner
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Appendix H: Analysis of Potential Fundraising Campaigns

Need: Time of Year

Review what times you would like to host a fundraising campaign. Use the calendar below combined with your knowledge of other busy times during the year to determine what time you would like to host the fundraiser. Determining what times are available will help you choose amongst seasonally based fundraising campaigns.



The needs of the ACE Staff

- Unrestricted funding to facilitate consistent programming and staff expansion
 - Healthcare benefits for employees
- Staff have a little time each week to work on fundraising efforts
- Staff cannot sustain high effort towards fundraising for long periods of time due to other program responsibilities

The needs of the ACE Board of Directors

- Hire full-time Executive Director
- Keep ACE initiatives aligned with ACE's mission
- Low risk fundraising

- Low time & monetary investment
- Well planned fundraisers
- Inclusion in idea conception process

Campaigns

Listed below are different fundraising campaigns gathered from staff feedback. The student group from WPI has analyzed each campaign's customer needs, approach and benefits per cost. To determine which fundraisers to implement, compare the different fundraiser's benefits per costs. Expand upon the rudimentary approach outline in the chosen campaign's Approach section and detail the specific benefits per cost of approach choices.

COMECC Campaign

Customers:

Government Employees

Customer Needs:

- Some employees need to “make a significant differences in the lives of children, families and communities across the state” –COMECC FAQ
- There are many nonprofits that do not service the advertised purpose of their charitable cause
- Some people don't donate to nonprofits because they are afraid they will be donating to an organization that will poorly distribute their donated funds.
- Donors need a reputation gauge for nonprofits if they want to donate to a nonprofit

Approach:

- Become a COMECC sponsored Nonprofit (Check)
- Campaign to government employees to donate to ACE through COMECC. Stress the transparency of funding and low overhead of ACE
- Research which government offices might be more sympathetic with the ACE mission (Immigrant/ refugee departments, Education department, African Employees)
- Choose a group of employees to focus on and work to understand what those employees specific priorities are (filling out the needs section of the COMECC campaign more)
- Find out how ACE could reach the specified employee group en mass. (Email, fliers, letters sent through department, Posters near where those employees frequent)
- Develop marketing materials that target the selected group's interests.

Benefits per Cost:

- C: not directly aligned with ACE mission
- B: Low resources necessary to complete this campaign
- B: Develop relationships with a new donor group

Spring/Summer Car Wash

Customers:

Car Owners in Worcester

Customer Needs:

- Cars get dirty in the spring with pollen and in the summer with dust
- Cars generally get dirty all year long
- People don't like seeing their car very filthy
- People need their car washed when it gets dirty
- People won't trust their car to be washed if the place or people washing seem disorganized
- People will get their car washed if it's convenient for them
- People will spend extra money on a commodity they would already be buying if the extra proceeds go towards charity

Approach:

- Hold a Car Wash
- ACE students work at the car wash to improve visibility of cause
- Car wash is held off of a busy street
- ACE staff researches local car wash prices and sets their price slightly higher than competition
- ACE advertises for car wash with public signs at the location of the car wash a few days before the car wash is held.
- All car washers wear the same t-shirt and all follow the same car-washing procedure
- ACE develop system for processing a car through the car wash
- To determine the best hours to hold the car wash, determine how many cars pass buy the place of car wash on the same given day the ca wash is to take place on

Benefits per Cost:

- B: High community awareness even for people not getting their car washed (branding)
- B: Low-risk event as car washes generally turn out profitable if informed expense and revenue decisions are made ahead of time
- C: Potential student safety risk
- B: ACE has done car washes in the past
- C: Potential weather risk
- C: does not align with ACE mission

Translation Fee for Service

Customers:

People/ companies needing translation services

Customer Needs:

- Corporations and government departments must hire translators when working with a person who does not speak English
- Corporations cannot hire full time interpreters

Approach:

- ACE offers translation services to corporations and government departments
- ACE hires out translator when contacted by a customer
- Money from translator comes back to ACE as a donation

Benefits per Cost:

- B: Aligns with ACE mission in that it helps African speaking people communicate with the people who hire ACE
- C: Inconsistent: Income only flows when corporations need translating services

Corporate Sponsorships with Local Worcester Colleges**Customers:**

Colleges

Customer Needs:

- Colleges are educational facilities with similar purposes as ACE but they focus on higher-level education
- Many Worcester colleges have feeder programs from local high schools because of a developed relationship between the high school and the college

Approach:

- ACE works with local colleges to promote a feeder program from ACE into these colleges
- ACE develops relationships with these colleges and gains funding for high school initiatives/ support
- ACE must develop college support program for ACE students

Benefits per Cost:

- B: Aligns with ACE's mission
- C: Very long-term campaign

5K Run Around Worcester**Customers:**

Runners/Teams

Advertisers

Customer Needs:

Runners/Teams

- People who run in marathons and 5-Ks regularly will travel some distance to run in one
- Professional runners need opportunities to practice before larger marathons
- People can participate in 5-Ks at any fitness level

Advertisers

- Advertisers want to advertise at high profile events
- 5-Ks are high profile in that they can disrupt A city's traffic movements
- The more people that will see an advertisement, the more an advertiser will pay

Approach:

- ACE holds a 5-K in Worcester to help people prepare for the Boston Marathon (a month or 2 months before the Boston Marathon)
- ACE advertises for its 5-K through the Boston marathon
- ACE directly invites established running communities or teams in Boston to the ACE Worcester 5-K
- ACE uses general marketing methods to advertise to the whole Worcester Community (fliers, bulletin Boards, companies)
- ACE works with the Worcester to set up a safe but high profile 5-K around Worcester
- ACE encourages its students to volunteer at event or participate for free
- ACE advertises for business on sign posts along the 5-K path. (Advertisers can 'sponsor' a sign post)

Benefits per Cost:

- B: helps ACE to establish their brand in Worcester
- B: Expands profile of ACE outside of Worcester
- B: Profit from both advertising and running teams signed up
- C: Does not align with ACE's mission
- C: Possible high advertising cost
- C: Hard to gauge pricing or interest

Bar Night**Customers:**

Young Urban Professionals

Customer Needs:

- Worcester has a growing community of young urban professionals due to the many colleges it has and new industries it supports
- Young (20-40) people enjoy networking and mingling at events
- Young people are willing to donate to causes with low donation necessity

- Young Urban Professionals may not have the means to donate or attend the Fall Fundraiser

Approach:

- Host an event for younger donors to drink and mingle at
- Provide local entertainment
- Rent a facility with bar and security provided
- Ask young people to donate to the ACE cause throughout the night

Benefits per Cost:

- B: Involves a section of the ACE donor base previously not harnessed
- C: Does not align with the mission at all
- C: Facility cost is high- ACE would need to receive high revenue to break even

Appendix I: NABC Presentation Worksheet

The NABC is a strategic decision making tool developed by SRI for innovation development. It serves as an effective tool for making informed decisions and a powerful tool for persuasion. Our groups suggests that ACE use the NABC to plan fundraising campaigns so that ACE will have documented planning of those campaigns and so that the ACE staff can clearly communicate the merits of implementing a campaign to the Board.

A rudimentary NABC for a CHOICE.

N: What is your need?



I **need** a friend.

A: What approach will you take to fill this need?



My approach is to get a pet frog.

B: What are this approach's benefits per cost?



Benefit: The frog *says* he's a prince

Cost: He's slimy so he's high maintenance to keep clean

C: How does this approach's benefit per cost compare to the competition's?



Getting a Frog compared to getting a dog as a pet.

Dog will love you and is warm but will ruin the house.

To choose between the two, re-examine your needs and add any you may have omitted.

If I feel more inclined to choose the DOG over the FROG or the opposite, then I should document what needs I've prioritized that caused me to come to this decision.

A run down NABC for the ACE Annual appeal (retroactively)

Needs: What specific needs does the Annual appeal fill?

Think about WHY ACE wanted to implement the annual appeal. A good **need** here is NOT "because ACE hasn't done an annual appeal before" but rather "ACE wants to take advantage of holiday charity and ACE needs to better understand ACE's donor base". These needs are general.

Approach: What's the approach (annual appeal) that ACE will take to fill these needs?

"ACE will implement a holiday annual appeal" is the most BASIC form of approach. What specifically has ACE chosen to do? (What website did ACE use? Why did ACE send out the annual appeal in an email?)

Defining the approach **around** the needs will lead to streamlined decision making. A well-defined approach is easy to translate into specific tasks to be completed.

Benefits per Cost: What are the benefits per cost of implementing an Annual Appeal in the way described in the approach?

What's good about this approach? This approach fills ACE's current needs. The annual appeal is low

What's the cost of this approach? Annual appeal does not bring in unrestricted funding, a current ACE priority.

Competition: Why did ACE choose to do an Annual Appeal over another campaign that fills the needs?

Here's where you justify your reasoning for choosing the Annual appeal over another campaign.

Reasonable people make reasoned decisions, so if you've chosen to do something ONE way then there's probably a reason in the benefits per cost of that choice compared to other options that made you choose it.

When should ACE use the NABC model?

Our group suggests that ACE use the NABC model to document the planning of events and fundraising campaigns from now on. Documenting not only what tasks were accomplished for an event is important but also documenting WHY that approach was taken is important. Future ACE staff would be able to look back on past events and campaigns and ask "Why did we do it like this?" and find their answer. The NABC will also serve as a template for the review of an event. Did an approach not work? What failed? Should ACE consider a need that was omitted this year in the future? The NABC will be a powerful tool to improve fundraising campaigns and events in this way.

Finally, the NABC will help ACE staff gain Board support on future initiatives. By considering the Board's point of view, the staff will be able to explain why an initiative is valuable to ACE. Staff should consider that the needs of the Board may differ from the needs of the staff. A well thought out approach will accommodate the two priorities.