

GRANTS To You (GTU)

Operating a Chapter

Overview:

Success in operating a Grants To You chapter depends to a large extent on three critical facets...a passion for performing community service, a willingness to utilize the successful operational model created by GTU and your ability to be both flexible and creative as you strive to meet the needs of the community you serve. Below you will find a listing of the key elements of GTU chapter operations. For each element, a detailed description is provided:

Operating Your Chapter:

1. Creating By-Laws
2. Obtaining a Fiscal Agent (Sponsor) or Becoming a 501C3
3. Establishment of Chapter Goals
4. Forming a Board of Directors or an Advisory Council (If you are not a 501C3)
5. Community Relationship Building
6. Financial and Statistical Information
7. Fund Raising
8. Scheduling Classes
9. How to Obtain Volunteers
10. Volunteer Registration
11. Volunteer Training
12. Volunteer Retention
13. Marketing and Public Relations
14. Reports, Preparation of
15. Report Output (Obtaining Reports)
16. Forms, Preparation of
17. Filing Systems
18. Position Descriptions; Executive Director and Board/Council Members
19. Chapter Annual License Fee
20. Agency Dues (if any) to Your Chapter
21. Utilizing the GTU WEB Site; Making it your WEB Site

-1-
By-Laws

Overview:

If you choose to obtain your 501(C) (3) designation, you will need to create a set of by-laws that will spell out the rules for operating your organization. If however, you decide to simply affiliate with a Fiscal Sponsor, then by-laws as such would not be required.

However, it would be a good idea to put on paper the basic rules that will govern how you will operate.

By-Laws

The need to create by-laws relates to how you decide to organize your chapter. If you choose the 501C3 route, then as a corporation you will need official by-laws. If on the other hand, you choose to partner with a Fiscal Sponsor, then by-laws as such are not required since the Fiscal Sponsor will be a 501C3 and have the required by-laws in place. (See Chapter 2 for more on this issue,)

This does not mean that you should not create a set of operating guidelines for your chapter in order to assure both effective and consistent operations that will enable you to achieve your mission.

If you go the by-law route, the easiest way to proceed is to obtain a set of existing by-laws from a local non-profit. Then, just adopt theirs to fit your GTU chapter.

Fiscal Sponsor or 501(C)(3)?

Overview:

Most non-profits are interested in effective and efficient fund raising and in not paying taxes on their net income. The two ways to achieve these two goals is to either obtain a 501(C)(3) classification from the Internal Revenue Service or to use a Fiscal Sponsor.

Benefits of Using a Fiscal Sponsor:

- Speed...it is possible for you to obtain a Fiscal Sponsor in a matter of days while to obtain a 502(C)(3) can take many months.
- Efficiency...small non-profits like GTU chapters would not need to employ a bookkeeper or perform many administrative tasks since the Fiscal Sponsor would take care of these activities.
- Convenience...using a Fiscal Sponsor will allow you to focus all of your efforts on your GTU chapter program without much consideration to administrative issues.
- Funding...since you may be a new chapter, you may find that affiliation with a Fiscal Sponsor such as your local United Way chapter, will provide you with better fund raising results, sooner.

Disadvantages of Using a Fiscal Sponsor:

- The Fiscal Sponsor is legally responsible for everything your chapter does. This includes:
 1. Complying with the terms of grants that have been awarded “to the chapter”.
 2. All chapter community programs, public information work, fund raising events, processing and acknowledgment of cash and non-cash revenue items, accounts payable and receivable, negotiation of leases and contracts, disbursement of “chapter/project” funds (including grants), and all other activities planned by the chapter.
 3. All Patents and copyrights (unless otherwise agreed).
 4. The chapter must place all funds and other assets received into a Restricted Fund held by the Fiscal Sponsor, to be used only for the specific purposes of the project.

Note: You may establish bank accounts that include the names of both your GTU chapter and the Fiscal Sponsor. In this manner, you will be able to maintain a degree of independence as well as practicality to carry on normal business.

Implications of Obtaining a 501(C)(3):

Benefits:

- Independence...able to administer chapter operations and funds with your Board approval only, so long as federal non-profits regulations are followed.
- Fund Raising efforts can be accomplished without running the funding through the Fiscal Sponsor (Using their name).

Disadvantages:

- Requires a significant amount of both paperwork and funding.
- Non-profits often choose to use a attorney to complete and file required paperwork which involves even more out of pocket cost
- Annual reports are required.
- You must form Board of Directors is required along with the related cost of obtaining Board liability insurance (\$800-\$1,200 annually).
- All administrative costs fall to the chapter.

Recommendations:

As a new chapter, it may make sense to initially align the chapter with a Fiscal Sponsor such as your local United Way chapter. When you are up and running and have accumulated some funding, you may feel that you are ready for the additional responsibilities and funding capacity associated with obtaining a 501C3 designation. For more on this topic, we suggest you review Section 501C3 of the Internal Revenue Code and Sections 509(a)(1) and 170(b)(A)(vi) of the Internal Revenue Code.

(SEE SAMPLE “FISCAL SPONSORSHIP AGREEMENT” FOLLOWING)

FISCAL SPONSORSHIP AGREEMENT

This agreement is made by and between the Fiscal Sponsor (FS)...the United Way of Yavapai County (UWYC) and Grants To You (the Project). The UWYC is an Arizona non-profit public benefit corporation located in Yavapai County, AZ, qualified from federal income tax under Section 501C3 of the Internal Revenue Code and classified as public charity under IRC Sections 509(a)(1) and 170(1)(A)(vi).

RECITALS:

1. The UWYC Board of Directors has approved the establishment of a restricted fund to receive donations of cash and other property earmarked to support the project known as Grants To You (GTU) and to make disbursements as they relate to the projects mission. GTU is expected to manage the affairs or the project. Currently, the principle offices of GTU are at 1608 St. Andrews Way, Prescott, AZ 86301.
2. UWYC desires to act as the fiscal sponsor of the Project by receiving assets and incurring liabilities identified with the Project beginning on the effective date of this agreement and using them to pursue the objectives for which the Project is being established which UWYC's Board has determined will further the charitable and educational goals of UWYC.

THEREFORE, THE AGREEMENT IS AS FOLLOWS:

1. The effective date shall be _____. At that date, UWYC shall assume operation of the Project, which operation shall continue in effect unless and until terminated.
2. All community programs, public information work, fundraising events, processing and acknowledgement of cash and non-cash revenue items, accounts payable and receivable, negotiation of leases and contracts, disbursements of Project funds (including grants) and other activities planned by the Project shall be the ultimate responsibility of UWYC and shall be conducted in the name of the UWYC beginning on the effective date of this agreement.
3. Beginning on the effective date of this agreement, the UWYC shall place all gifts, grants, contributions and other revenues received by them and identified with the Project into a restricted fund to be used for the sole benefit of the Project's mission. The parties agree that all money and fair market value of property in the restricted fund of UWYC shall be reported as income of UWYC for both tax purposes and for the purposes of UWYC financial statement.
4. All of the assets received by UWYC under the terms of this agreement shall be devoted to the purposes of the Project and within the tax-exempt purposes of the UWYC.

SPECIAL PROVISIONS AGREED TO BY THE PARTIES:

1. Personnel who may be compensated for working on the Project shall become at-will employees of the UWYC on the effective date of this agreement but shall not receive any fringe benefits other than those required by Federal or Local statute such as the employer’s share of Social Security taxes.
2. Tangible and intangible property such as copyright(s), WEB Site(s), etc. obtained or created in connection with the Project shall remain the property of the founder of Grants To You, Paul R. Baskin, 1608 St. Andrews Way, Prescott, AZ 86301.

TERMINATION OF THIS AGREEMENT:

1. This agreement shall terminate when the objectives of the Project can no longer reasonably be accomplished by the UWYC. Beyond this, if the objectives of the Project can still be accomplished but with either party’s desires to terminate the UWYC’s fiscal sponsorship of the Project, then:
 - a. 60 days written notice shall be required of either party.
 - b. Another qualified Fiscal Sponsor is available who is willing and able to sponsor the project and is approved in writing by both parties prior to the end of the 60-day period. If such is the case, all restricted funds and related liabilities on the books of the UWYC will be transferred to the new Fiscal Sponsor.
 - c. The same provisions shall apply if and when GTU becomes a 501(C)(3).

AGREED TO:

Effective Date: _____

United Way of Yavapai County

By: _____ **Title:** _____ **Date:** _____

Grants To You

By: _____ **Title:** _____ **Date:** _____

Establishment of Chapter Goals

Overview:

Steven Covey, the author of *The Seven Habits of Highly Effective People* said, “Start with the end in mind”. This means that before you do almost anything related to starting your chapter, take the time to jot down some critical goals that come to mind. It may help to take a look at some suggestions listed below, the Operating a Chapter Section and the goals and the accomplishments of GTU included on this WEB Site.

Once you have created a preliminary road map of your chapter’s future, it will be much easier to recruit board or council members and gain the cooperation of community partners like Colleges, Grant Experts, RSVP and United Way.

Goals to Consider:

Some Suggested Short Term Goals (Up to One year):

- Create your Board or Council. Try to gain the inclusion of the United Way Executive Director, the Director of RSVP, all of the Grants Managers at the local colleges and even the local high schools, the Dean of non-credit courses at a college(s), the Executive Director of a major seniors group, a couple of community leaders, a Certified Public Accountant and a local attorney.
- Agree on your vision and your mission and your short and long-term goals necessary to support them.
- Develop a simple one-page document that explains who Grants To You is and be sure that whomever you meet with receives it.
- Establish relationships with the local colleges (non-credit faculty leaders) and grant managers), your local United Way (among other things, explore Fiscal Sponsorship and membership on your Board or Council) and RSVP (explore recruiting, new RSVP membership potential and Board or Council membership)
- Review the Operating a Chapter Section and review each item. There is a write up for each item listed.

Some Suggested Long Term Goals (Up to Five Years):

- Number of volunteers who will be taught and will be assisting their favorite non-profit.
- Senior and student participation
- Level of performance of volunteers
- Volunteer drop out rates
- Volunteer hours
- Number of classes taught annually
- Obtaining 501C3 status
- Grant and donation progress
- New programs
 - Agency grant helper referrals
 - Elderhostel students
 - Professional grant writer referrals
- Community Recognition
- Board Development

Forming a Board of Directors or Advisory Council

Overview:

Your Board of Directors (if a 501C3 is chosen) or Advisory Council is the heart and soul of your chapter. Obtaining their strong and committed leadership and involvement, you have a much better chance of achieving your short and long-term goals.

Consider recruiting citizens who either have a passion for your vision and mission and/or who have something to gain from being an integral part of your operation. For example, United Way agencies like to be seen as reaching out to the community beyond their usual fund-raising and allocation process. Local colleges feel likewise in order to engender the support of the community. In the case of RSVP, they are seeking memberships, an area that GTU can well support.

Beyond those noted above, seek grants experts, community leaders and community professionals (accounting and legal fields). You want your Board or Council to be both effective and seen as strong and capable by your community, by the funding community, by donors and by non-profits, one of whom may become your Fiscal Sponsor.

Goals to Consider:

1. Form a Board or Council large enough so that when some can't attend a meeting (no more than quarterly after start-up) you will still have a sufficient number to conduct business.
2. Seek member assistance in specific areas as noted on the GTU listing of Council Members, their Titles and their Duties with GTU. Emphasize the importance of the vision and the mission, the goals, professionalism and accountability.
3. Assure that the scope of all assignments has been agreed to as well as the completion date. Be sure to follow up on or before that date to assure completion.
4. Always publish "Action Notes" from each meeting as well as an agenda for the next. Provide adequate time for preparation.

Community Relations Building

Overview:

According to Wells Fargo Community Partners in Phoenix, Grants To You is a “triple barrel winner”, because we assist and support seniors, students and non-profits. Our challenge, and it isn’t a big one based on the positive reception we receive everywhere we travel, is to let the community know what you stand for and how you can support their efforts.

How to Build Community Support

1. Establish an Advisory Council or Board of Directors made up of well-informed, well-known and well-placed citizens.
2. Build community relationships and your Board by visiting local colleges, high schools, the United Way chapter, the local RSVP location, senior organizations, grant officers and local government officials (see comments below on each).
3. Meet with the editor and/or a reporter(s) of the local paper and encourage them to do a story on your chapter. We find that the Grants To You story is generally well received and generally published by local papers. (Caution: Be careful on your timing of the publication of the article, since you will likely receive many calls from interested volunteers and even some agencies and therefore will need to have all of your infrastructure set up and ready to go).
4. Meet with the agencies that receive allocations from your local United Way and bring them up to speed on Grants To You. Over time, you can expect all of these agencies to send you volunteers for training.
5. Meet with the Deans of colleges who establish curriculum and urge that their students get involved in the Grants To You program. Your pitch to them is that their students will, as a result of their involvement sharpen their reading comprehension skills, their writing skills and at the same perform community service. (Note: Many schools give course credit for our 9 hours of training as well as the actual participation of writing and researching grants.
6. Meet with the mayor and members of the local city council and let them know what you are doing. Seek their support in spreading the word, joining your Board and/or funding.
7. Establish strong, ongoing relationships with the Executive Director of the local United Way and the Director of RSVP, both of whom have the ability to provide volunteers, serve on your Board and in the case of United Way, serve as your Fiscal Sponsor.

Financial & Statistical Information

Overview:

The creation of well formulated financial reports can do much to enhance your understanding of how effective your operations has been and serve as a key indicator of what changes need to be made in the future to improve.

Financial Information

1. An annual budget forecast for each year beginning 2004
2. A annual report of your actual performance versus budget
3. A cash flow summary report
4. A listing of grants awarded and submitted/in process

Grants To You Chapter

Sample Budget (If a 501C3) Annual

Revenue

Grants Awarded \$1,500

Total \$1,500

Expenses

Class supply	200	4 classes...\$50 ea.
Teacher	800	4 classes...\$200 ea.
Program mgr	400	4 classes...\$100 ea.
Fee to GTU	30	2% of Actual Revenue

Miscellaneous 70

Total \$1,500

Net Surplus (Deficit) \$0

Grants To You Chapter
Sample Actual Results
vs. Budget
6 Months and Full Year

	Year to Date			Annual		
<u>Revenue</u>	<u>Budget</u>	<u>Actual</u>	<u>Variance</u>	<u>Budget</u>	<u>Actual</u>	<u>Variance</u>
Grants Awarded	750	600	-150	\$ 1,500	1,450	-50
Total	\$ 750	\$ 600	-150	\$ 1,500	\$ 1,450	-50
<u>Expenses</u>						
Supplies	\$ 100	90	-10	\$ 200	170	-30
Teacher costs	400	400	0	800	900	100
License Fee	0	0	0	30	30	0
Program Mgr.	200	200	0	400	400	0
Miscellaneous	35	20	-15	70	40	-30
Total	\$735	\$710	-25	1,500	1,540	40
Net Surplus (Deficit)	\$15	\$(110)	\$125	\$ -	\$(90)	\$(90)

GRANTS To You National
Cash Flow Summary Report
Annual

2004 2005 2006 2007 2008 2009 2010 2011

Cash Balance, Beginning of Year

Add: Revenue From:

Grants
United Way of Yavapai County
Other donations
Licensing Fees

Total Cash Available

Less: Cash Spent:

Executive Director Salary and Fringe
WEB Site Expansion of Services
WEB Site Maintenance
Rent
Office Supplies
Board Insurance
Liability Insurance
Board Meeting Costs
Chapter National/Regional Meeting Costs
New Chapter Training Costs

GRANTS To You
_____Chapter

Grants Obtained, In Process or Funded

- 1= Approved for funding**
- 2= In process**
- 3= Funded**

Grantor Name Dollars Date Status (1/2/3)

Fund Raising

Overview:

According to Wells Fargo Community Partners in Phoenix, Grants To You is a “triple barrel win”, because it assists and supports seniors, students and non-profits. This gives us substantial leverage when we apply for grants or seek donations. Further, since GTU is a grants training organization, it makes sense that we seek to obtain most of our funding via grants.

Grants and other forms of fund raising:

1. Obtain a listing of all clubs in your community such as Lions, Rotary, etc. Arrange to meet with them and determine how you could obtain grants of say \$500 (Note: It takes only \$250 to run a class).
2. Working closely with the Grants Officers at the local colleges and high schools. These professionals generally make themselves available for some grant researching for non-profits (time permitting). Since these folks are among those with whom you will be seeking to build relationships, you will likely receive a high level of cooperation from them. Ask them to find a number of appropriate grants that GTU may apply for. Give them some dollar amounts like your annual revenue budget (\$1,500 estimated) and the approximate grant amount (\$2,000-3,000).
3. Find out from your County which community has the CDBG funding for the coming year and learn all about how to apply.
4. Keep a listing of volunteers who have called for training, but do not have a favorite non-profit. Seek to “recruit” them to volunteer for your chapter.
5. Run ads (generally free) in your local paper, seeking volunteers for the Grants To You training program and for Volunteers who would like to work with your chapter in particular.
6. Seek out the Volunteer Center in your community. It could be operated by United Way, by a city(s) in your community or by some other non-profit agency. Ask them to place ads for GTU volunteers.
7. Write a Public Service Announcement(s) for radio and television. Contact the local stations and ask for their assistance and support. They will likely help you with production and run your announcements at no charge.
- 8.** After you are established in the community and have trained a number of volunteers, you may wish to consider obtaining additional revenue by creating agency members who would pay a small amount of dues. What’s in it for them is your continuing support.

Scheduling Classes

Overview:

Grants To You is in the “training business”, make no mistake about it. Your chapter will be measured by the community and by funders and donors based upon how many volunteers are trained, how many hours they are giving to non-profits, how many agencies are being helped and how many research projects and grants have been written and awarded. All of that means that the more quality classes you offer, the more volunteers will be out there helping your community.

Scheduling Classes:

1. It all begins with the identification of qualified and willing teachers in your community. These grants professionals will likely come from the local colleges and high schools. What we recommend you seek is coverage for no less than four quarterly classes each year. You will also be seeking an effective and proven training curriculum. Within this WEB Site is a 9-hour suggested training curriculum that your trainers may wish to review. (Note: The Prescott, AZ chapter of GTU has been quite successful with a 9 hour offering with the first Saturday class of 3 hours and the next at 9 hours)
2. At the same time, you should be seeking a training site that has no less than 20 seats, with possible computer access to the Internet (Your teachers will guide you in terms of what is needed). The facilities will likely come from one of the local schools. Work with school officials (Deans of non-credit courses may be best) to lock in dates a year in advance. TIP: Watch out for holidays, school closing dates and construction projects at schools when setting your training dates.
3. Work with your committed teachers so that the dates selected match their availability. Give the teachers plenty of time to prepare and to become familiar with the sight of the training.
4. Visit the site yourself to assure that all is in readiness. Be sure that any software that is needed has been installed and is functioning properly and that the password issues have been resolved (your teacher will help you in this effort).
5. Let the community know via a press release (local paper) and public service announcements (radio and TV) when your classes are and how to sign up. Also utilize your Grants To You provided WEB Site to show class schedules, the assigned teacher and the class location.
6. Let the non-profits in your community know by sending out an E-mail to them. A listing may be obtained from your local United Way or some other local agency.
7. Enter the schedule of classes on this WEB Site and update the Site as classes are completed and as new classes are scheduled (See Utilization of WEB Site)

How to Obtain Volunteers

Overview

We will be talking about two types of volunteers...those who take your class and volunteer to write and/or research grants for a non-profit agency and those who provide administrative support for your chapter.

(A) Student Volunteers...Grant Writers and Researchers

Before devoting any energy to obtaining volunteers, you would do well to first review and totally understand the mission and vision of GTU that states: "Motivated, computer literate and available seniors and students are to be the primary focus of the volunteer effort". Given that, the following are the steps that may be taken to achieve a steady flow of volunteers:

We would also suggest that you develop a quarterly class schedule, so that when you start recruiting, you can actually talk about projected future training periods. After you lock in a training location and a trainer, you can set specific dates, times and places.

1. Make contact with the local chapter of RSVP (GTU can assist you with a name and an introduction) and explain the GTU program to the Director and seek his or her support. Explain that many of your volunteers will be over 55 years of age and therefore be eligible to join RSVP and receive benefits such as mileage and liability insurance. Suggest that consideration be given to joining your Advisory Council/Board of Directors and to serve as your recruitment volunteer.
2. Make contact with the local chapter of United Way (GTU can assist you with a name and an introduction) and explain the GTU program to the Executive Director and seek his or her support. If you are not going to file for a 501(C (3), suggest to the Executive Director that he or she consider their United Way Chapter being the Fiscal Agent for your chapter and that this will provide the community with strong evidence that the UW Chapter is reaching out in so many ways beyond just the allocation of funds to non-profits. Seek to have the Executive Director join your Advisory Council or Board of Directors.

Further, ask whether you could meet with the agencies funded by the United Way chapter in your community so that you can tell the Grants To You story. You will likely find strong support and lots of volunteers after your presentation.

3. Meet with the appropriate parties at each of your local colleges. These people would include the grants officers (they are good teaching candidates and can help find you some grant opportunities), the non-credit course Dean (Can arrange for needed facilities at the college as well as registration and graduation certificates and can connect with any senior programs at the school) and the person responsible for curriculum decisions (can connect you with the students so that the volunteer program can be one of their choices). What you are seeking are qualified persons to teach your classes, a good facility with computer equipment to use for the training of volunteers, a registration of your students at one of the colleges and the ability to recruit seniors and students for your training program.
4. Meet with the editor of your local newspaper and let him/her know what you are doing in the community and ask that they do a story about Grants To You. GTU can help you with articles, press releases and such, so that you won't need to re-invent the wheel.
5. Make contact with the major senior organizations in your community and arrange to speak at one of their gatherings to explain your program. You will be amazed at how many of these folks will have an interest in the GTU program.
6. Be sure that you have plenty of materials to provide to prospective volunteers and/or representatives of groups from whom volunteers will be obtained. When the GTU WEB Site is up and running, you will be able to download much of that material.

(B) Administrative Support Volunteers

Overview

These individuals can be of great value to your chapter, particularly in the area of agency and volunteer follow up. For example, volunteers can complete the "Volunteer Status Calling Form" by contacting agencies and student-volunteers to determine how they are doing in their initial volunteering efforts.

Senior citizens may be your best candidates.

1. The best places to go to obtain these volunteers are retirement communities, homeowners associations, AARP, RSVP, churches and senior recreation centers.
2. Be sure to provide specific instructions and where there is a form involved, like the Volunteer Status Calling Form, provide a complete explanation of each column and how to complete the form.

Volunteer Registration

Overview:

The process of registering your volunteers for a class is not unlike that same process for any student attending any college. They will be required to provide some specific information to enter on your WEB site “Volunteer Interest/Registration Form”.

Information from the Interest/Registration form will be recorded in a database for use in creating a class roster and in making contact. When the chapter feels that the class is complete, they will call for a report of all registrants for that class (a class roster) and forward that report to the teacher of that particular class.

The Process of Registration:

1. The Program Manager or administrator receives completed Volunteer Interest/Application form both via e-mail and directly to the class roster. A copy of the form is printed out and filed in a folder that contains all of the paperwork for each student registered for that particular class.
2. The volunteer/student will be automatically notified by e-mail that he or she is registered. The non-profit agency that will be utilizing the volunteer will also receive notification.
3. File the Volunteer Interest/Application form within the “class “folder (In the future, the filing will all be done via the WEB Site/database.
4. Continue accepting applications until you have the number you are seeking (about 20 works) plus about 20% or 24. The airlines call this over-booking. We call it reserve for those who cancel at the last minute.
5. When registrations exceed the desirable number, notify those registrants by e-mail and ask if they would like to be included in the next class roster. If yes, move them out of the overbooked roster and into the next class roster.
6. In addition, volunteers will pull down a Confidentiality Agreement that needs to be signed by them and turned into the Program Manager/administrator on or before the class.

Volunteer Training

Overview:

Let's begin by understanding that our volunteers are not going to be trained as professional grant writers or researchers. Further, they are not going to take the place of trained professionals in this field. What they will be capable of doing is to assist professional grant writers and researchers and to assist overburdened Executive Directors and Development Officers in their quest for additional grant funding.

Cautionary Note #1: Professional grant writers in your community may have concerns about your program, feeling that their business may be reduced. Please meet with them and assure them that such will not be the case.

Cautionary Note #2: During the indoctrination and training of volunteers, do not imply that these folks may, at some future date, be able to charge for their services. These trainee volunteers are just that and should not be encouraged to charge for their services at any time.

All of your trainees will have been pre-qualified for the classes (see the Volunteer Interest/Registration Form on this Site). This means that they will be computer literate, have good writing and keyboarding skills, be comfortable using the Internet and have both word processing and spread sheet skills. They will also be available to volunteer at least three days per month on the average.

Volunteer Training:

1. Based upon our experience and feedback from our volunteers and non-profit agencies, we feel that twelve hours of training is sufficient.
2. In the document that follows this one, we have provided a curriculum outline that we have tested and found effective. You may utilize the outline as presented or modify it in any way your teacher(s) feel is necessary to achieve the objective. It goes without saying that your modifications and those of other chapters will serve to improve both the process and the content.
3. It is important to note that the 9 hours (2 classes...one for 3 hours and one for 6 hours with lunch in between) of training seems to suit the teachers and that is most important, given the fact that they "volunteer" their time for the most part (\$20 per hour plus or minus).
4. We recommend that at the conclusion of the training or at break (second of 2 sessions) the chapter provides lunch (optional) to all students and invited agency representatives and Board/Council members as well. Lunch can be modest, making use of the college cafeteria or ordering out for pizzas. The key is to have a chance to meet informally with the volunteers and have some interchange on the training and volunteering that will follow.

5. Following the lunch, we recommend that volunteers receive certificates of completion (Note: One of the colleges you work with will generally provide the certificates or a variety of software programs like PrintMaster will do the trick).
6. You may wish to consider offering additional, follow up training to your (9) hour graduates in order to further sharpen their understanding of grant writing and research. Ask your graduates if they are interested and if the numbers are strong, go for it. It may turn out to be a problem solving session in which the volunteers describe their specific challenges and are looking for feedback. You can also use these sessions to gain further insight on the effectiveness of the program and areas that can be improved.
7. A critical aspect of training is the evaluation of the class and the instructor. There is no better source for this evaluation than your students. We would therefore urge you to pass out the evaluations (sample provided herein) at the end of the final class session and assure that they are all returned before the class is let out.

Volunteer Training Curriculum

Overview:

Training to write and research grants is taught over an entire semester, over a one week period, three intensive days or the GTU way in (9) information crammed hours, sufficient to enable our volunteers to assist grant writing professionals, Executive Directors and Development officers in their never ending quest for grant funds.

Feedback to date suggests that our training regimen is sufficient to get the job done. Naturally, we will continue to refine the suggested curriculum as we receive more feedback from agencies and chapters.

We suggest that your instructors review this curriculum and then customize it to suit their style and content requirements.

Curriculum Suggested:

- All about grants, grantors and agencies
 - Who applies for a grant?
 - Why apply for a grant?
 - Who is giving away the money?
 - Relationship between the grantor and the agency
 - Partnering for success
 - Grant funding cycle
- Grant Research
 - Identify the agency problem and show how it will be solved
 - Review the agency mission and goals
 - Assemble a project team at the agency

- Know the kind of grant(s) you are seeking (Active or Reactive)
- Find a grantor who shares your vision (research)
 - Where to look
 - What databases are best to use
 - Who has access to these databases
 - How to use the internet for your search
 - Information/volumes available at your local library
 - What to look for
 - What to print out

- Writing and Submitting a Grant Request
 - Read the application carefully
 - Identify a source of information at the agency for each element of the grant proposal.
 - Identify and assign responsibility for each proposal element.
 - Making contact with the grantor...relationship building
 - Establish a time line that will enable the grant to be submitted on or before the stated deadline
 - Following the instructions
 - Understanding each question
 - Writing clearly and concisely...
 - Attachments (Only if requested)
 - Number of words (Never exceed)
 - Use of graphics if appropriate
 - Perform a critical review of the finished proposal...revise and submit as necessary
 - Do a grant writing exercise working with the mission, vision and goals of each volunteer's favorite non-profit.

Volunteer Training Curriculum by (3) Hour Session

Session #1 (3 hours)

- Introductions
- Logistics
- Why apply for a grant?
- Who is giving away this money?
- The symbiotic relationship between donor and non-profit
- Partnering for success
- Grant funding cycles

Session #2 (6 hours)

- Introduction of databases
- Research
- Hands-on navigation
- *Practice writing
- Critique

*Students produce a product that they can submit on behalf of their chosen non-profit

GRANTS TO YOU EVALUATION OF GRANT RESEARCH & WRITING CLASS

Chapter _____

Last Class Date: _____

Today's Date: _____

Please rate the items on the following scale:

5 = yes 3 = somewhat 1 = no

		SCORE		
		5	3	1
(Enter One X per statement)				
#1	I am confident that I can write a grant letter.			
#2	I am confident that I can prepare a simple grant request.			
#3	I am confident that I can perform research to discover grant opportunities for my non-profit.			
#4	I am confident that I can use a computer to find grants.			
#5	Did the class meet your expectations?			

#6 How can we improve our training?

A. The recruiting process _____

B. The class procedures _____

C. Class content _____

Other comments you would like to share

Volunteer Retention

Overview:

Except for the lack of payment for services rendered, GTU volunteers are very much like paid employees. By that we mean that they are seeking the same types of rewards...well-defined work requirements, meaningful work, recognition for a job well done, effective support, adequate and ongoing training, feedback on their performance, a caring/welcoming environment to work in, enjoyable time spent and social interaction with others.

Volunteer Retention:

1. Review the Position Description for the Grant Writer/Researcher volunteer position and be sure that the volunteer has a complete understanding of what will be expected. Also, review the various performance and activity reports with the volunteer so that there is an understanding of why, when and how. Finally, discuss how a Board or Council member will maintain an ongoing, ombudsman like interface between GTU and the volunteer and the agency to assure that all is going well and to deal with any difficult issues before they get out of hand.
2. Make a special effort to let your volunteers know how valuable their assistance will be to the community. Explain how overburdened the non-profit managers are and how helpful volunteer efforts would be in enabling these agencies to carry on their helping mission.
3. Assure that all of the training programs you offer have relevant, real world content, provide useful handouts, have hands on content with both computer systems and actual model grant writing.

Tip: Be sure that each volunteer brings the mission, vision and goals of their selected non-profit to class. This will enable them to gain better clarity about how the training will be able to help that organization.

4. Have a Board or Council Member be responsible for Volunteer Retention. We call this position "Placement/Non-Profit Interface." Review the position description and work hard to see that all aspects are carried out effectively. Of greatest importance is the contact maintained between your chapter and the volunteer as well as the agency being served. Performance and activity reports are also critical tools that reflect volunteer and agency satisfaction as well as areas of weakness in the relationship or the program itself.
5. Plan at least one annual gathering of all current volunteers and present awards recognizing the efforts of the participants. Have guest speakers from the agencies served who will share the great value that your volunteers have delivered and have some refreshments to enable volunteers to mingle with the peers and informally share their thoughts about the program.
6. Assure that all volunteers and agencies being served are in your contact database and will therefore receive all bulletins and newsletters when published.
7. If you have obtained a volunteer Program Manager or administrator, consider paying him or her a small stipend like \$100 per class quarter (about \$10 per hour) to assure retention and resulting program continuity and quality.

Marketing and Public Relations

Overview:

Like any business, GTU chapters need to let the community know what they stand for and what they are doing. By community, we mean non-profit agencies, retirees, students, schools, government agencies, community leaders, potential funders and donors and media. These are the groups from which you will obtain your volunteers, your teachers and facilities and your funding to carry on your work.

Marketing and Public Relations:

1. The first step is to identify a Board/Council member to be responsible for Marketing/Public Relations. Review the Position Description provided herein and seek a community member with a strong background in Marketing.
2. After the chapter's annual and long term goals have been agreed upon by the Board/Council, seek to have the Marketing person create an annual marketing plan that will support agreed upon goals.
3. The marketing plan should include a cost estimate and a time line, by month. This should be submitted to the Board/Council Finance person to assure that funding has been provided.
4. Once the Finance person has reviewed the cost aspects of the plan, the marketing person should present the plan to the entire Board/Council to gain approval of the program.
5. Community contacts with the media, various service clubs like Lions, the local Chamber of Commerce, and homeowners associations will help to ensure that your message will be delivered, community-wide.
6. Encourage the use of Press Releases, Public Service Announcement and inclusion in various newsletters since these are generally no cost options. Limit paid advertising unless you can obtain adequate funding.
7. Finally, it is important to remember that all Board/Council members and all of your volunteers and agencies are conduits for your marketing program. Be sure that they have brochures, newsletters and any other tools necessary to get the word out on a consistent basis.

Preparation of Reports

Overview:

Like any other business, the creation of reports helps the chapter run its business more effectively and efficiently. At the same time, reports will enable GTU to understand how things are going throughout the country and to respond by strengthening the program as needed as well as assisting chapters who are struggling.

It is our plan to automate much of this process so that a GTU, a chapter or a volunteer will be able to enter information one time, on-line within our WEB Site and then be able to request a report out of the system that summarizes all that you have entered over whatever period you wish.

Specific Report to Prepare-Why, When, and How:

- (Annual) Agency-Volunteer Evaluation Submission
This annual report, **to be completed by each Agency, on-line**, will enable both the agency and the chapter to evaluate each of the GTU volunteer(s) for such variable measures as availability, current status, quality of work, productivity, and timeliness. You will also be able to indicate the volunteer's greatest strengths and areas of weakness and finally, be able to assess GTU's performance in preparing and supporting the volunteer.
- (Annual) Agency-License Fee Report
This annual report, **completed by the Chapter, on-line**, enables you to calculate the amount of the annual license fee.
- Student-Volunteer Status Calling Form
This report should be **completed by Chapter administrative volunteers** within 30 days of the completion of the class. This quality related report's purpose is to determine if the student-volunteer reported to his non-profit and if not why. To complete the report, the administrative volunteer calls each agency. If the volunteer has not reported, the caller contacts the student volunteer to obtain details.
- (Monthly) Volunteer Progress Report.
This monthly report, **completed by the student-volunteer, on-line** will serve as a self-assessment tool as well as a report of hours of volunteering during the month and the current status of the volunteer. The volunteer can also use this form to share areas of greatest comfort, and areas of concern. He or she can also rate the performance of GTU in terms of training and support.

Grants To You

Annual Agency-Volunteer Evaluation Submission

Year Ended December 31, ____

Date _____

Evaluator Name: _____

Name of Volunteer _____

Name of Non-Profit _____

Completed Projects: #Grants ____ \$ _____ # Letters of Intent ____ \$ _____

#. Research _____

Projects in Process: #Grants ____ \$ _____ # Letters of Intent ____ \$ _____

#. Research _____

Funded Projects: #Grants ____ \$ _____

Volunteer Hours _____

VOLUNTEER STATUS:

- 1 () Still volunteering for Agency
- 2 () Volunteer temporarily unavailable
- 3 () Volunteer never started
- 4 () Volunteer quit program
- 5 () Volunteer not sufficiently qualified
- 6 () Volunteer did not get along with Agency staff
- 7 () No projects available for volunteer at this time

VOLUNTEER PERFORMANCE

Overview:

Rate 1 – 5 (Rating 1=Great, 5=Poor)

- 1 Quality?
- 2 Timeliness?
- 3 Productivity?
- 4 Average Rating?

Grants

Letter of

Intent

Research

All

Combined

Areas of greatest difficulty/concern (Check all that apply):

- 1 () Needs to improve writing skills
- 2 () Needs to sharpen computer research skills
- 3 () Needs to be more careful in reading/interpreting requirements
- 4 () Needs to be available on a more regular basis
- 5 () Did not get along with staff
- 6 () Not qualified (Expectations not being met)

Areas of greatest comfort (Check all that apply):

- 1 () Great writer
- 2 () Great researcher
- 3 () Great interpreter of grant requirements
- 4 () Availability
- 5 () Great working with staff

GRANTS TO YOU PERFORMANCE

Areas of concern:

- 1 () Insufficient training (not enough)
- 2 () Inadequate training (quality problem)
- 3 () Volunteer not really qualified (Qualification problem)
- 4 () Poor follow up/responsiveness to Agency complaints

E-Mail: _____

WOULD YOU UTILIZE THIS VOLUNTEER IN THE FUTURE? ()YES ()NO

Annual Agency License Fee Report

Overview:

This annual report is designed to enable you to calculate the annual license fee due to GTU.

Calculation:

Actual annual revenue from grants, donations and dues: \$_____

Calculate ___% of the above revenue: \$_____

Please make your check payable to United Way of Yavapai County, attach this report to the check and mail to:

United Way of Yavapai County

Grants To You
Step One Community Center
3343 N. Windsong Drive, #7
Prescott Valley, AZ 86314

Grants To You
 _____ Chapter
 Volunteer Status Calling Form

Caller Name _____

Class Ending Date _____

Calling Dates:

Started _____

Completed _____

VOLUNTEER INFO		AGENCY INFO		VOLUNTEER STATUS							VOLUNTEER REASONS**				
Volunteer Name	Phone #	Executive Director Name	Phone #	Still There	Temp. Out	**Nevr Started	**Quit	Not Qualif	Staff Probl.	No Project Available	Not For Me	Family Oblig	Not Confident	Health Issues	All Other

Grants To You

Monthly Volunteer Progress Report

Date _____

Month of _____, Year _____

Your Name _____

Name of Non-Profit _____

Your Chapter _____

Completed Projects: # Grants \$ _____ # Letters of Intent \$ _____ # Research _____

Projects in Process: # Grants \$ _____ # Letters of Intent \$ _____ # Research _____

Funded Projects: # Grants \$ _____

Volunteer Hours: _____

YOUR VOLUNTEER STATUS:

- 1 () I am still volunteering for the agency
- 2 () I was temporarily unavailable
- 3 () I Never started
- 4 () I quit the program
- 5 () I am not sufficiently qualified
- 6 () I felt uncomfortable working with Agency staff
- 7 () There were no projects available for me

YOUR PERCEIVED PERFORMANCE:

OVERVIEW (How do you think your doing?)

Rate 1 - 5 (Rating 1=Great, 5=Poor)

- 1 Quality?
- 2 Timeliness?
- 3 Productivity?
- 4 Average Rating?

Letters of Intent All
Grants Intent Research Combined

=====

Your areas of greatest difficulty/concern (Check all that apply):

- 1 () I need to improve my writing skills
- 2 () I need to sharpen my computer research skills
- 3 () I need to be more careful in reading/interpreting requirements
- 4 () I need to be available on a more regular basis
- 5 () I had some challenges working with agency staff

6 () I am not qualified (Not meeting expectations)

Your areas of greatest comfort (Check all that apply):

- 1 () Writing
- 2 () Researching
- 3 () Interpreter of grant requirements
- 4 () Availability
- 5 () Working with staff

GRANTS TO YOU PERFORMANCE

Your areas of greatest concern:

- 1 () Insufficient training (not enough)
- 2 () Inadequate training (quality problem)
- 3 () Poor recruiting...I'm not really qualified
- 4 () Poor follow up/responsiveness to me, to the Agency

WILL YOU CONTINUE TO VOLUNTEER IN THE FUTURE? ()YES ()NO

progrept100-02

Name

E-mail:_____

Report Output (Obtaining Reports)

Overview:

This WEB Site, when completed, will totally support the needs of your chapter, your agencies and your student-volunteers when it comes to knowing how the student-volunteers are doing and the effectiveness of the total GTU program.

The reports will come from a database that the system maintains as information is provided to it by the student-volunteers monthly and by the agencies annually. To obtain this information, those with a password can select the desired report (see below), enter the inclusive or ending date(s) when prompted and then print or review the report.

Specific Reports

- Volunteer Performance (From Annual Agency Volunteer Evaluation Submission)
 - For a single year
 - For multiple years (side by side for comparison purposes)
- Volunteer Performance (From Monthly Volunteer Progress Report Submissions)
 - For a single period
 - For multiple periods (side by side for comparison purposes)
 - On a cumulative basis (multiple periods)
- Volunteer Benefits Report (From Annual Chapter Submission)
- Volunteers (By name within chapter)
- Agencies working with chapter volunteers
- Chapters within counties, states, regions, nation
- Volunteer applications
- Agency applications and license agreements

Grants To You
 _____ Chapter
 Annual Volunteer Performance Reporting (By Agency)
(From Annual Agency Evaluation Report)
 Period Ending December 31, _____

Date: _____

Volunteer Name	Date Class Completed	VOLUNTEER WORK DONE		
		No. of Grants	No. of Letter of Int.	Re
Total "Yes"				
Percent "Yes"				
Totals		X	X	

Grants To You

Date: _____

From Annual Volunteer Evaluation Submissions

Period or Cumulative

Period:

From: _____

To: _____

Specific Measure	Measured Period	Measured Period	Measured Period	Measured Period
-------------------------	------------------------	------------------------	------------------------	------------------------

- Seniors (Over 55)-No. of
- Full Time Students-No. of
- All other volunteers-No. of
- Registered-No. of
- Completed Class-No .of
- Completed Class-%
- Total Vol. Hours
- Average Vol. Hours
- No. of Grants
- No. of Letters/Intent
- No. of Research Proj.

Status (No. of)

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

Overview (Average)

- Quality (1)
- Timeliness (2)
- Productivity (3)
- Average all above (4)

Concerns (No. of)

- 1
- 2
- 3
- 4
- 5
- 6

Comfort (No. of)

- 1

2
3
4
5

GTU Concerns (No of)

1
2
3
4

Vols to Continue (No. of)

Vols to Continue (%. of)

Grants To You

_____ Chapter
 Volunteer Performance Reporting (By Volunteer)
(From Monthly Volunteer Progress Report(s))
 Period: From: _____ To: _____

Date: _____

VOLUNTEER PERFORMANCE OVERVIEW

Volunteer Name	Date Class Completed	VOLUNTEER WORK DONE				VOLUNTEER PERFORMANCE OVERVIEW																											
		No. of Grants	No. of Letter of Int.	No. of Research	No. of Hours	Status							O. View				Concerns					Comfort				GT Conc							
						1	2	3	4	5	6	7	1	2	3	4	1	2	3	4	5	6	1	2	3	4	5	1	2				
Total "Yes"																																	
Percent "Yes"																																	
Totals		X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X				

Grants To You

Date _____

_____ Chapter
 Volunteer Performance Reporting (By Volunteer)

From Monthly Volunteer Progress Report(s)

Period or Cumulative

Period: From: _____ To: _____

Specific Measure	Measured Period	Measured Period	Measured Period	Measured Period	Measured Period	Measured Period	Measured Period
-------------------------	----------------------------	----------------------------	----------------------------	----------------------------	----------------------------	----------------------------	----------------------------

- Seniors (Over 55)-No.of
- Full Time Students-No.of
- All other volunteers-No.of
- Registered-No.of
- Completed Class-No.of
- Completed Class-%
- Total Vol. Hours
- Average Vol. Hours
- No. of Grants
- No. of Letters/Intent
- No. of Research Proj.

Status (No. of)

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

Overview (Average)

- Quality (1)
- Timeliness (2)
- Productivity (3)
- Average all above (4)

Concerns (No. of)

- 1
- 2
- 3
- 4
- 5
- 6

Comfort (No. of)

- 1
- 2
- 3

4
5

GTU Concerns (No of)

1
2
3
4

Vols to Continue (No. of)

Vols to Continue (%. Of)

Grants To You

_____ Chapter

Date: _____

Volunteer Performance Reporting (By Agency)

From Annual Volunteer Evaluation Submissions

Period or Cumulative

Period: From: _____ To: _____

Specific Measure	Measured Period	Measured Period	Measured Period	Measured Period	Measured Period	Measured Period	Measured Period
Seniors (Over 55)-No. of							
Full Time Students-No.of							
All other volunteers-No.of							
Registered-No.of							
Completed Class-No.of							
Completed Class-%							
Total Vol. Hours							
Average Vol. Hours							
No. of Grants							
No. of Letters/Intent							
No. of Research Proj.							
<u>Status (No. of)</u>							
	1						
	2						
	3						
	4						
	5						
	6						
	7						
Overview (Average)							
Quality (1)							
Timeliness (2)							
Productivity (3)							
Average all above (4)							
Concerns (No. of)							
	1						
	2						
	3						
	4						
	5						
	6						
Comfort (No. of)							
	1						
	2						
	3						
	4						

5
GTU Concerns (No. of)
1
2
3
4
Vols to Continue (No. of)
Vols to Continue (%. of)

Forms...Utilization of

Overview:

Like any other business, the utilization of standard forms helps your chapter run its business more effectively and efficiently,

It is our plan to install these forms on-line within our WEB Site, automating as much as possible, to eliminate duplication and drudgery. The good news is that the information, once entered, will become available to chapters (their own data) and to GTU...all on-line.

Specific Forms-Why, How and When:

For Completion by Agencies:

- *Letter of Support
 - The agency receives a completed document for each new volunteer, agreeing to accept that specific volunteer on completion of their GTU training and to complete two annual reports...Volunteer Benefit Report and Volunteer Performance Report.

For Completion by the Volunteer:

- *Interest/Registration
 - Allow for a volunteer to sign up for volunteering/classes
 - Automatically qualifies volunteer
- *Confidential Information Agreement
 - Protects agency so that no private information is inappropriately revealed by volunteer

For Completion by Chapter:

- *Application
 - To sign up as a member/chapter of GTU
- *License Agreement
 - To become a licensee of GTU
- *Annual Licensing Fee Form
- Calculate and Report Fee with Check Attached

*Form Provided Herein

Filing System

Overview:

Like any other business, the establishment and maintenance of certain files can greatly enhance the effectively and efficiency of your chapter.

Our ultimate goal is to utilize our WEB Site to make most of your files electronic. For example, we are planning to have volunteers sign up on-line. The information he or she provides will be stored in a database that will reflect the class date selected and all of the other information about the volunteer and the chapter he or she will be working with. Chapters will be able to pull up their class information at any time to know how many have signed up and all of the particulars.

Files to be Established and Maintained:

Volunteer/Class Files

- Completed Interest/Registration forms for each scheduled class
- Registered Volunteers who did not provide the necessary paperwork or who did not show up for class...use this file to try to register these volunteers for future classes.
- Registered Volunteers who did not complete all of the class sessions
- Agency Support Letters by scheduled class
- Confidential agreements by scheduled class
- Class Matrix...check off list for each volunteer by scheduled class to assure that all paperwork is turned in.
- Completed Class Roster for each Scheduled Class
- Volunteer Leads/Inquiry Calls (From phone, e-mail or referrals)

Grant Files

- Grant Leads/Opportunities
- Grants in Process
- Grants Awarded
- Grants Declined

Board/Council Files or Notebook

- Board/Council members, their contact information, their history and their specific volunteer function
- Potential Board/Council members
- Board/Council meeting schedule, agendas, minutes and action items
- By-Laws or Operating Guidelines

Community Contact Files

- Each organization or person
 - Contact information
 - How they can help
 - How the chapter can help them

Teacher Files...A single file holding information on current teachers and potential teachers.

Facilities File...A listing of current and future sites, the primary contact, a description of their facility, their rules for use and availability information..

Events Files

Actual or Scheduled Events. One file for each. All the particulars/logistics, etc.
Future Events (One file)...Possible dates, features, goals, etc.

-18-

Position Descriptions

Board of Directors (If 501C3) or Advisory Council (If using Fiscal Sponsor)

- **Executive Director/Program Manager/Administrator**
- **Chairperson**
- **Financial/Accounting**
- **Training**
- **Placement/Non-Profit Interface**
- **Volunteer Recruiting and Screening**
- **Council Development/Recruiting**
- **Marketing**
- **Funds Development**

Position Description

Executive Director/Program Manager/Administrator

Reports to: Board of Directors/Executive Committee

Salary Range: Currently Volunteer

Summary:

Responsible for providing the overall leadership of Grants To You as well as for assuring the effective operation of all activities and utilization of all resources of Grants To You in concert with the Mission Statement and goals established by the Board of Directors (Executive Committee).

Essential Duties and Responsibilities:

- Develop an effective Executive Committee/Advisory Council to provide broad based community leadership.
- Develop funding sources and initiate the necessary steps to obtain funds.
- Put financial controls in place in accordance with generally accepted accounting principles
- Drive the recruiting effort for new, qualified grant writing and researching volunteers.
- Provide public relations support
- Create a database to track volunteers and non-profit agencies throughout the county
- Assure that appropriate training of volunteers takes place in an effective and timely manner
- Establish standards of performance for volunteers, assuring the highest quality.
- Build relationships with critical community groups such as the Community Foundation, RSVP, SCORE, Area Agency on Aging, Senior Concerns, United Way, etc. in order to assure a steady flow of qualified volunteers and community contacts.
-
- Develop support mechanisms for volunteers such as mileage reimbursement, insurance, etc. in order to attract and maintain qualified volunteers.
- Create and obtain approval for annual operating and capital budgets. Monitor such budgets against actual expenditures and explain variances.

Qualifications:

- Previous experience working with non-profit organizations
- General knowledge of grant writing, research and reporting.
- Previously demonstrated leadership skills
- Successful experience working with non-profit Boards of Directors
- Experience working with volunteers
- Strong financial management background
- Demonstrated fund raising skills
- Motivational skills
- Strong organizational skills

Position Description

Chairperson

Summary: Responsible for providing leadership to the Council and coordination of Council activities with the Executive Director.

Essential Duties and Responsibilities:

- Attend and lead Advisory Council meetings
- Build relationships with community groups to assure support for our efforts and a steady flow of qualified volunteers
- Assist with developing funding sources
- Leads in establishing an annual strategic planning retreat that will examine and update the GTU mission, its objectives, its strategies and its board and committee structure as necessary.

Position Description

Finance/Accounting

Summary: Responsible for all financial and accounting matters

Essential Duties and Responsibilities:

Establish and maintain control of all organizational assets

Assure the accurate recordation of accounting transactions

Assure that internal controls are adequate to safeguard assets

Assure that regular, accurate financial statements are prepared and presented to the Board/Advisory Council

Create and present an annual budget in based upon the agreed to mission and objective of GTU.

Create regular reports that compare actual revenues and expense to the approved budget and provide explanations for variances.

Assure that all necessary reports for government agencies, sponsors and financial institutions are prepared in a timely and accurate manner.

Position Description

Training

Summary: Responsible for developing and implementing an ongoing training program for volunteers wishing to write and/or research grants for non-profits.

Essential Duties and Responsibilities:

Determine and document the required training program

Identify well-qualified trainers

Identify and arrange for appropriate training facilities and equipment

Create processes to assure that the training is effective

Position Description

Placement/Non-Profit Interface

Summary: To be aware of non-profit organizations in our community who may be interested in utilizing trained GTU volunteers for grant research and/or writing and to interface with these organizations to facilitate placement, to resolve any disagreements and to assure quality performance consistent with GTU's quality standards.

Essential Duties and Responsibilities:

Create and document standards of performance for GTU volunteers

Create and implement a method of evaluation of performance for each assignment and council volunteers as necessary; provide for additional training if required.

Resolve any disputes or disagreements between a non-profit agency and a volunteer.
Create and produce regular reports reflecting the placement and performance of GTU volunteers.

Position Description

Volunteer Recruiting and Screening

Summary: Responsible for recruiting qualified volunteers (60%-80% seniors, 10% students) to be trained to write and research grants for their favorite non-profit and to screen volunteer prospects who contact Grants To You.

Essential Duties and Responsibilities:

- Develop programs to assure a sufficient number of qualified volunteers have been identified to fill scheduled and planned classes.
- Create a number of sources from which to obtain volunteers.
- Publish announcements through the media as necessary to attract volunteers.
- Develop effective partnering with non-profits throughout Yavapai County as another ongoing source of volunteers.
- Work closely with the GTU non-profit interface advisory council member to understand the traits for volunteer success so that future applicants can be even more successful.
- Maintain records of volunteer information so that GTU is able to report on a variety of variables that will measure such items as diversity, background and age range among others.

Position Description

Council Development/ Recruiting

Summary: Responsible for training and development of the Advisory Council as well as the recruiting of new members of the Council.

Essential Duties and Responsibilities:

Arrange for regular training and development of the Advisory Council and its members to assure the highest level of ongoing effectively and performance.

Establish a committee that will identify willing nominees to serve on the Advisory Council.

Create organization by-laws/operating guidelines and present them to the Advisory Council for approval.

Position Description

Marketing

Summary: Responsible for creating and executing the marketing plan for GTU as needed to support its volunteer and fund raising efforts...

Essential Duties and Responsibilities:

Create and present an annual marketing plan and budget that is designed to meet the mission and objectives set out by the Advisory Council.

On approval, execute the marketing plan.

Work closely with Council Members so that they may assist in implementation of the plan.

Gain familiarity with various media sources, clubs, relevant non-profits and homeowners associations in the community to assure a high level of visibility and support for GTU programs.

Position Description

Funds Development

Summary: Responsible for identifying all community funding sources and for providing the necessary funds to cover all GTU activities based upon the budgets approved by the GTU Advisory Council.

Essential Duties and Responsibilities:

Locate sources and develop a steady flow of resources that will provide continuing support form GTU program and overhead costs.

Assist in training all Council Members to assist in fund raising efforts.

Establish and maintain a database of funding sources and provide a process to assure ongoing communications with such sources in order to assure continued funding.

Work closely with the Marketing person/committee to create fund raising campaigns and events needed to achieve the approved budget objectives.

-19-

Annual Licensing Fee

Overview:

Consistent with the Chapter Application and the terms and conditions of the License Agreement both of which were executed by your chapter, an annual license fee is due and payable to GTU within 31 days of the end of each calendar year or by no later than January 31.

For your information, GTU will use these funds to maintain the infrastructure that supports all of the chapters including the WEB Site, create a newsletter(s), publish bulletins as new opportunities are known or improvement made, produce an annual meeting and regional meetings (where applicable) and provide ever expanding contacts for grants and for community partners like United Way and RSVP in order to enhance the operations of the chapters.

How To Calculate the License Fee:

7. Obtain a License Fee Calculation form (“Financial Reports to GTU”).
8. Record your annual revenue as noted on the form.
9. Calculate the annual fee by multiplying the rate (currently at 2%) times the revenue you recorded.
10. Write a check in favor of GTU for that amount and forward along with the form to Grants To You, 4926 Antelope Dr., Prescott, AZ 86301

Note: Your annual report and check needs to be in our hands on or before January 31.

Agency Dues to Your Chapter

Overview:

As your chapter grows, it will more than likely become known as a valuable agency resource for supplying trained volunteers to write and/or research grants for non-profits in your community. Therefore, it is not inconceivable that at some point, you may want to install a new agency membership program in your community that will enable member agencies to receive priority treatment as it relates to volunteers who do not have a favorite non-profit for which to volunteer.

As members, you may wish to charge a small annual membership fee to defray operating costs of the chapter.

Suggestions for Seeking Memberships and Charging Fees:

1. Draft a preliminary plan and take it to your Board/Council for their comments and approval.
2. After approval, arrange meetings with some of your most influential and important agencies, especially those who have consistently sent you volunteers for training.
3. Discuss your membership concept and get their feedback.
4. If you are getting mostly favorable responses, prepare to announce and implement your new program to all of the agencies and to the community at large.
5. We would suggest an annual fee of no more than \$25. This fee should more than offset the cost of newsletters, bulletins, agency lunch costs provided at class graduations and the cost of holding an orientation for agencies that are to be receiving volunteers.
6. Establish regular meeting dates with the agency members. It is not unlikely that many new ideas will be generated to improve your chapter's operations and/or support. Agencies will also be able to gain clarification on specific issues that concern them.

Utilizing the GTU WEB Site

Overview:

When completed, this WEB Site will have an exceptional array of features that are designed to minimize the time required to operate a chapter while providing a responsive, customer/user friendly environment. Such features as automated volunteer registration, class scheduling and performance and fund raising reports are prime examples.

Below you will find a listing of the features of the Site and a brief overview of the benefits of each feature and how to utilize that feature using the WEB Site technology.

Site Features and Utilization

In Place

- Home page for each chapter
- News
- Questions & Answers
- Advisory Council listing
- Goals
- Vision & Mission
- Class Registration on-line
- Automatic notification of registration to GTU chapter, volunteer and selected agency
- Class location, dates, times and instructor
- Class rosters (one for each); movement of students from one roster to another
- Contact by e-mail with a single student, all students in a class or all students in all classes
- Contact by e-mail with all agencies who received student volunteers
- Attachments with all contacts