



2009 Applicant Coaching Guide

Applicant Coaching Guide

What is the purpose of this guide?

Last year, Echoing Green received nearly 1,500 applications for just 20 fellowships. In such a competitive pool, the top candidates stood out not just by demonstrating a good idea or a passion for their work, but by sharpening their applications through an intense vetting process. And thus, this year, we recommend that all candidates serious about competing for a fellowship go through a similar review process *prior to submitting an application*. To this end, we have created a coaching toolkit that will allow you to develop and fine-tune your application, just as past fellows have.

What is the coaching toolkit?

The toolkit is a pre-application review process that helps candidates polish their ideas through a combination of personal reflection and external feedback. In addition to helping candidates submit more competitive applications to Echoing Green, the learning generated by these tools can be reused with just about any other funder, making the process a wise long-term investment.

Before initiating the coaching process, be certain that you have sufficient time to devote to it. Ideally, you should begin the process at least a month before submitting your application, which will give you about a week for each step in the process.

Participation is highly recommended and self-directed through our free tools. The coaching process will take you through the following steps:

- 1) *Find a coach*
- 2) *Complete the tools*
- 3) *Draft your application*
- 4) *Get feedback*
- 5) *Revise and submit your application*

1) *Find a coach*

The ideal application coach is someone whom you trust to give you honest feedback. They don't have to be an expert in your field or a social entrepreneur themselves, but they must be able to give you constructive criticism, even when it's tough to give. Many Echoing Green fellows attribute their success in the application process to having a critical coach who pushed them to do their best thinking.

Ideally, your coach should be able to commit at least 10 hours to the process (spending a few hours each on familiarizing themselves with the Echoing Green coaching guide and funding criteria, reviewing your application, giving you feedback, and providing additional criticism on a second draft). Be clear about these expectations up-front so that you don't have to worry about time constraints later on.

Examples of possible application coaches include mentors, professors, friends, family members, athletic coaches, colleagues, managers, and members of the clergy. Keep in mind that your coach should be a sounding board who helps you reflect upon your ideas, not someone who generates those ideas or writes your application for you.

Once you've identified a potential coaching candidate, send them the Coaching Guide (which outlines the duties of an application coach) and give them some time to read it over to be sure they can commit to the responsibilities described in the guide.

2) Complete the tools

The personal reflection component of the coaching toolkit is comprised of a series of tools that help you hone each component of your idea. The tools will take you step-by-step through the most common mistakes Echoing Green applicants make and help you avoid them by showing you both weak and strong examples of effective idea development. These examples are drawn from the application-reviewing experience of Echoing Green staff over the past several years.

Please note that the examples are meant to demonstrate the clarity and logic of a successful application, not to prescribe a certain way of achieving social impact. It is not necessary to be a multi-million dollar organization like Teach for America in order to be considered successful. **Whether you hope to create a national organization that serves thousands or a local organization that impacts a small number of community members in a deep way, what's most important is that your application is clear and compelling.** And while it's impossible to have everything perfect on day one, the top Echoing Green candidates are also those who've spent the most time reflecting upon and refining their ideas.

In addition to improving your application, the tools are designed to help you think about your potential to create true transformational change. While Echoing Green seeks emerging leaders who can run effective organizations, it's also looking for social change agents who will create a deep and lasting impact in their chosen communities. Whether through their direct work, by inspiring others to get involved, or by leading change at a policy level, they don't just get results; they actually realize their vision for change. And thus, the coaching tools will help you figure out how you can serve as a transformative leader.

Please allot at least an hour to each tool that you utilize. Ample time is critical to getting the most out of these resources – after all, the tools can't do anything by themselves; it's the reflection and revision on your end that produces results.

The coaching toolkit includes the following tools (which are best completed in order):

- 1) **Problem Definition:** What specific problem are you focused on and can you realistically solve it?
- 2) **Root Cause Analysis:** What is the underlying cause of the problem you're trying to solve?
- 3) **Goal Setting:** What will your community look like when you've solved the problem?
- 4) **Logic Test:** How will the activities that you undertake lead to the change that you envision?
- 5) **Innovation Matrix:** Are you adding new value to the world or duplicating the efforts of others?
- 6) **Opposing Viewpoints:** How does your idea stand up to criticism from those who know your field?
- 7) **Environmental Scan:** What factors in the world around you may influence your work?
- 8) **Financial Planning:** Do you understand the resource requirements of running your organization?
- 9) **Personal Reflection:** Are you prepared to lead the change you seek?
- 10) **Making the Pitch:** Can you communicate your idea in a way that makes sense to others?

After completing each tool, put it away for at least a day. Then, come back to it and see if your answers still make sense. You may also want to share these tools with your coach for a second opinion. Revise and repeat them as many times as necessary until you feel that your answers are absolutely clear, concise, and logical.

If you have questions about how to complete the tools, you may submit them to apply@echoinggreen.org. Keep in mind, however, that we cannot review your completed tools, nor can we serve as your coach. In addition, please do not send your completed tools to Echoing Green, as they are not part of the application and will not be considered.

3) Draft your application

Once you feel confident about your mastery of the tools, you should have no problem completing a draft application. You'll find that the new knowledge you've gained from the tools has a direct bearing on the questions asked by the application.

You can find the application questions and tips in the Application Guide. Most importantly, be very clear and specific in all of your answers. Use examples and relevant statistics, but don't use jargon or academic language. Someone from outside your field should be able to pick up your application and instantly know exactly what you're doing and how you're doing it.

4) Get feedback

After you've drafted your application, give a copy to your coach and ask them to take several days to look it over. Using the Coaching Guide, they will analyze your answers and generate constructive feedback. Then, schedule a couple of hours to walk through this feedback with them.

During the feedback session, **make sure that you are psychologically open to any and all criticism. If you're defensive and closed off, the feedback will be useless.** Just remember that the vast majority of Echoing Green Fellows voluntarily subjected themselves to this kind of challenging feedback and were better off for it in the long-run.

On the other hand, if your coach doesn't offer many critiques of your application, be sure to push them to really challenge you. It's up to you to make clear to your coach that you not only want this kind of feedback, but that you need it!

5) Revise and submit your application

Ideally, once you've received your initial feedback, you'll take a day to reflect upon it. After digesting your coach's input, you will revise your application. Finally, you'll share your revised application with your coach and ask for additional feedback. Even if you don't have time for multiple iterations, you should definitely go through at least two revision cycles:

- 1) Review for Content
 - a. Logic – "I don't understand how this specific environmental education program will lead to a reduction in global warming."
 - b. Clarity – "I can't figure out what your environmental classes will actually teach."
 - c. Persuasion – "I don't see the need to open a new environmental organization."
- 2) Review for Style
 - a. Jargon – "What does 'value-added post-assessment score' mean?"
 - b. Mechanics – "There's too much passive voice in your application."
 - c. Spelling – "'Polution' is spelled incorrectly."

Keep in mind that, while any good coach will be able to perform the content review, you may need to seek an additional coach for the style review, depending on your coach's writing and editing skills. If you need to look elsewhere, try asking a friend whose writing you admire or an English teacher.

Once you've gone through the review process, take one final look at your tools. Then, look at your application to see if you've captured the essence of the things you learned throughout the process. If you can honestly say that your application represents your very best thinking and writing on your idea, it's finally time to submit your application. Otherwise, go back to your application and make sure that it

reflects all of the hard work and deep thought you put into the coaching process. Ultimately, your application should be a statement of purpose that can make both you and the community you serve proud!

Tool 1: Problem Definition

Problem: Many unsuccessful applicants neglect to explain the problem they are trying to solve. They either list several different problems (all of which would be impossible to resolve with a single organization) or, if they do focus on a specific problem, they neglect to explain why it's a significant problem worthy of Echoing Green's funding.

Solution: Top candidates narrow in on 1-2 very specific problems. They define them incredibly clearly and they provide relevant statistics to make the need obvious.

Activity: Complete the following table for each specific problem and gather relevant statistics and anecdotes. You can find these by talking to experts or searching the Internet. For example, if you are working on an environmental issue, you might search for "global warming statistics."

What specific injustice in the world have you seen that compels you to start a new social change organization?	Who, specifically, is hurt or affected by this injustice and how does the injustice manifest itself?	Is it realistic that a single organization could address this injustice? If not, define the problem more narrowly.	How big or deep is this problem, based on statistics or anecdotes?	Why is the problem important, based on statistics or anecdotes? What other problems does it cause?
Weak Example: <i>Low-income students doing poorly in school, dropping out of college, and not getting good jobs</i>	<i>Kids in poor areas end up on the streets and unemployed</i>	<i>Yes – We can tackle all of these issues by working harder than existing organizations</i>	<i>A lot of websites report that low-income students are not doing very well on standardized tests.</i>	<i>Education is very critical to life success, say many experts. If you don't get it, you won't be able to succeed.</i>
Strong Example: <i>Students from low-income communities receiving inferior education</i>	<i>American children in low-income urban and rural communities perform poorly in school compared to their wealthier peers.</i>	<i>No – One organization can't address all educational issues for students from low income communities. Our organization will focus very specifically on children between 1st and 4th grade since statistics show that children who fall behind at that point in their education aren't able to catch up later and don't graduate from high school.</i>	<i>A recent article in The New York Times noted that, on average, nine-year-olds growing up in low-income communities are already three grade levels behind their peers in high-income communities.</i>	<i>Half of low-income students don't graduate from high school by the age of 18, according to a report by the National Assessment of Educational Progress. As a result, only 1 in 10 earns a college degree.</i>

Tool 2: Root Cause Analysis

Problem: Even after defining a problem, many candidates neglect to think beyond the obvious symptoms, or the apparent effects of the problem. In other words, they overlook the root causes, or the deeper issues that may be causing the problem. And thus, their solution ends up being superficial, in the sense that it doesn't get to the heart of the problem.

Solution: Top candidates analyze the root causes of the problems they wish to address. They separate the symptoms from their underlying origins and then develop solutions that address these origins.

Activity: Complete the diagram below to get beyond the symptoms of the problem to the root cause. Be sure to "Ask Why" in a probing manner that gets you beyond the usual suspects (e.g., poverty, apathy – which are usually symptoms, not root causes). And then, once you determine the root cause, ask why once more to consider what has prevented other organizations from addressing the root cause previously – and what this means for your work. Repeat this process for each symptom that you've diagnosed (e.g., lack of affordable housing AND low quality of affordable housing). Keep in mind that it is not always the case that asking why three times will lead to the root cause. If you don't feel you've reached a root cause after three "whys", continue the exercise until you feel comfortable with the root cause.

Weak Example:

Symptom: *Achievement gap between American students from high and low-income backgrounds*

Why? *Low-income schools lack adequate resources*

Why? *Their communities are very poor*

Why? *Families don't have any money*

Root Cause: *Poverty*

Why? *Society doesn't care about poor people*

Implications for Work: *Try to make people less apathetic about poverty*

Strong Example:

Symptom: *Achievement gap between American students from high and low-income backgrounds*

Why? *Low-income students do not come to school as prepared to learn as their high-income peers*

Why? *Inadequate health care and nutrition, lack of high-quality pre-school programs, and stressful home lives that make it difficult to find adequate space, time, and support to focus on school*

Why? *Communities haven't taken sufficient steps to mitigate these socioeconomic pressures — either by improving economies and public services or by investing extra resources and capacity in schools in low-income areas — because of our prevailing priorities, policies, and practices*

Root Cause: *Lack of leadership throughout American government and society to fully address the additional challenges faced by low-income students*

Why? *Education is not prestigious enough to attract the best and brightest to leadership roles*

Implications for Work: *Change social status of education by developing aggressive recruiting campaign and highly competitive selection model – just as other high-status professions have.*

Symptom:

Why?

Why?

Why?

Root Cause:

Why?

Implications for Work:

Tool 3: Goal Setting

Problem: Applicants often respond to very specific problems with very vague goals. Without having a specific goal in mind, it's difficult to develop an effective solution, let alone measure the impact of that solution. In addition, they neglect to set goals that represent a permanent, transformative change in society. Often organizations meet their programmatic goals but social injustices persist because the solution was not adopted systematically by other players in the field.

Solution: Top candidates develop clear, specific, and realistic goals. They also set goals that go above and beyond the direct work of their organization to reflect deep, lasting transformational change in their community. This impact will carry on well beyond the lifetime/scope of the organization.

Activity: Answer the following four questions about your vision for social change.

- **If your work succeeds, what will the headline in the newspaper say?**

Weak Example: "Low-income students doing better in schools"

Strong Example: "Low-income students perform as well as wealthy peers on all academic assessments nationwide"

- **If your work succeeds initially and then your organization ceases operations, what will the impact on society be?**

Weak Example: Without great teachers and leaders being recruited into the system, low-income students will return to poor achievement levels.

Strong Example: The talented young leaders in the corps will continue to improve public education for years to come. In addition, the enhanced status of education in society will ensure a steady stream of future leaders for generations, keeping the achievement gap between low-income and wealthy students closed for good.

- **How will you measure the volume of your work? And what goals do you have for each in the short and long-terms?**

Weak Example: The number of students served (hundreds of thousands by the near future)

Strong Example: The number of corps members recruited (4,200 by 2010) and students served (440,000 by 2008) and the diversity (33% people of color by 2010) and quality of the corps (95% had leadership positions in college by 2008), and the financial stability of the organization (\$160 million budget by 2010)

- **How will you measure if your work is making a difference? And what goals do you have for each measure?**

Weak Example: Student achievement (strong test scores in a couple of years)

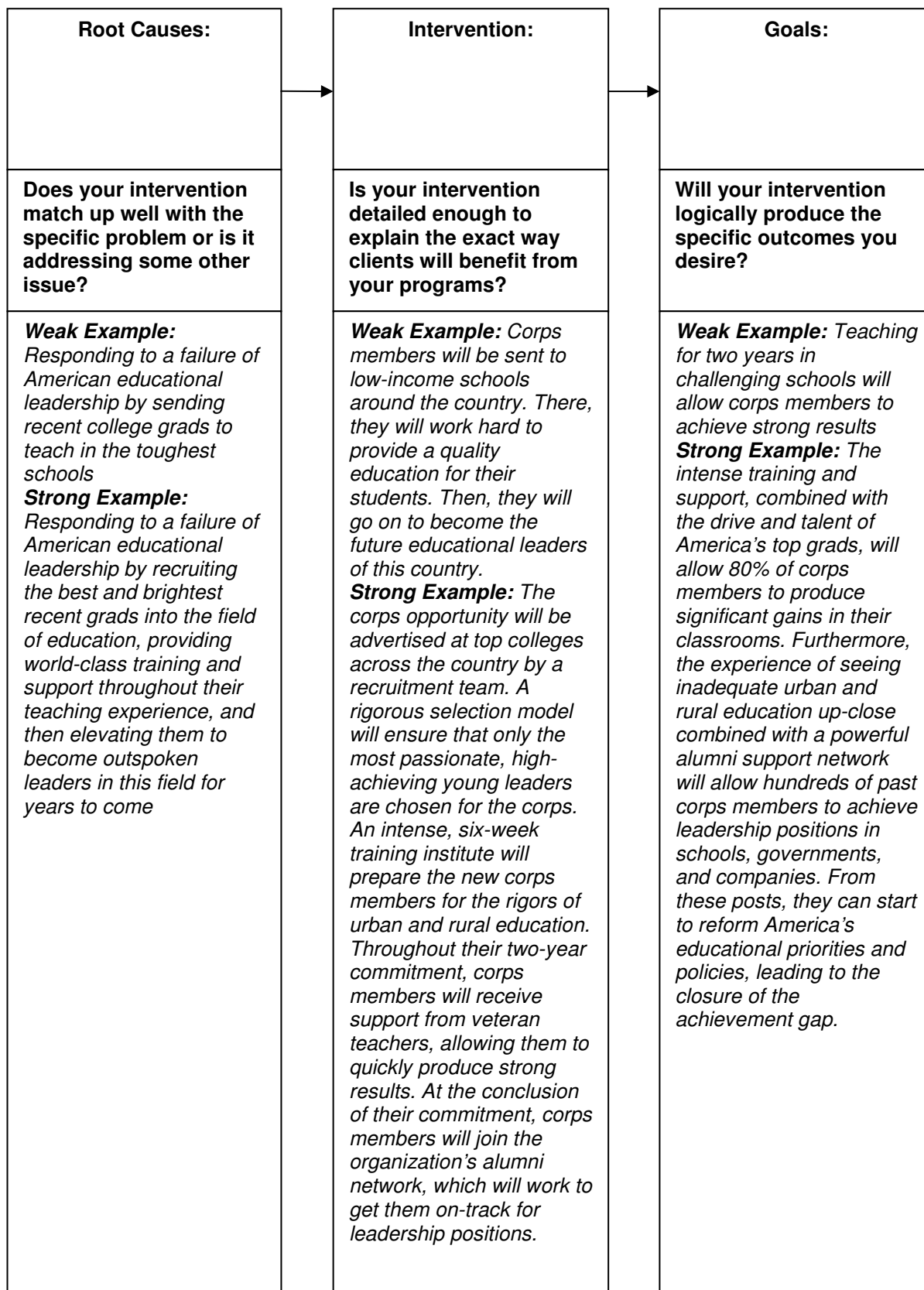
Strong Example: Percentage of corps members achieving significant gains (i.e., 1 ½ years of progress in the course of one year) in their classrooms (80% by 2010), percentage of corps members who completed their two-year commitment (89% by 2008), and number of corps members serving in leadership positions (800 school leaders, 100 elected officials, and 12 social entrepreneurs by 2010)

Tool 4: Intervention

Problem: Many applicants have well-defined problems, as well as goals for ameliorating those problems. And yet many also completely neglect to explain how their work will specifically move from the problem to the stated goal. This makes it hard to believe that they will actually be able to reach their goals, given that there's no clear roadmap to get there.

Solution: If you have applied for funding before, you may have encountered the phrase “theory of change”. In simple English, your theory of change is why you believe taking the actions that you specify will yield your intended results. Top candidates develop a clear, logical path for reaching their goals. This “theory of change” takes the application reviewer step-by-step from a well-articulated problem, to a detailed intervention that matches the problem, to an outcome that seems logical based on the intervention.

Activity: Complete the following diagram, making sure that there's a logical flow from one step to the next.



Tool 5: Innovation Matrix

Problem: When applicants have a powerful “AH HA” moment/*moment of obligation*, they often assume that they are the first person who has ever arrived at their particular solution to a social challenge. Or they are often inspired to get to work immediately and neglect to learn about how others have tried to solve the issue. Applicants also often assume that the only way to achieve their goals is to start a new organization.

Given that starting an organization is an incredibly difficult and expensive enterprise and that there are already over 1 million organizations in the US alone, it often makes more sense to find out which organizations are already working in your field and then see if you can collaborate with them to achieve your goals. And yet, applicants frequently neglect to research their sector to learn more about the existing organizations.

Solution: Wise social entrepreneurs spend a great deal of time researching their field. They gather information on the major players and compare and contrast their respective ideas. If they find an organization that’s already implementing their idea, they work with it to achieve their goals. And even if no organization is already working on their exact vision, they find compatible organizations that may be willing to incorporate their new idea. Only when they’ve exhausted existing resources do they attempt to start a new organization.

Activity: Find at least three other organizations that work in your field, work with the community you will serve, or work in the same way that you hope to. You can find these organizations by talking to experts, reading articles, and searching the Internet. Then, complete the following table:

Organization	Aspect of overlap (check those that apply)	What does this organization do?	How are they similar to your organization?	How are they different than your organization?
Weak Example: <i>Didn't find any organizations</i>	<input type="checkbox"/> Working with same population <input type="checkbox"/> Working on same issue area <input type="checkbox"/> Using a similar model of change	<i>My search didn't turn up any organizations doing exactly what I plan to do</i>	<i>No one is doing what we're doing</i>	<i>We're doing this work better than anyone else out there</i>
Strong Example: <i>The New Teachers Project</i>	<input checked="" type="checkbox"/> Working with same population <input checked="" type="checkbox"/> Working on same issue area <input type="checkbox"/> Using a similar model of change	<i>Recruit mid-career professionals to become teachers in cities across the US</i>	<i>They are also attempting to place teachers in some of the most impoverished places in the US</i>	<i>We look at teaching as one step in becoming an educational leader while they seek lifetime teachers</i>
	<input type="checkbox"/> Working with same population <input type="checkbox"/> Working on same issue area <input type="checkbox"/> Using a similar model of change			
	<input type="checkbox"/> Working with same population <input type="checkbox"/> Working on same issue area <input type="checkbox"/> Using a similar model of change			

Tool 6: Opposing Viewpoints

Problem: Applicants are incredibly protective of their ideas. After all, the idea can feel like an extension of the entrepreneur and putting it out for critique often seem extremely threatening. The end result of this apprehension is that too many applicants neglect to have their idea thoroughly vetted prior to submitting it to Echoing Green. And too often, the first genuine feedback they get comes from their Echoing Green rejection letter – too late to make a difference for their application!

Solution: The boldest social entrepreneurs do not hesitate to open their ideas to criticism. They realize that the idea is about serving their communities, not themselves. And thus, they owe it to their communities to put forward the best idea, even if that means revising their plans in the face of opposing viewpoints.

Activity: Complete the following three exercises to learn more about potential opposing viewpoints.

- Find a professional in your field who is likely to disagree with some part of your idea. You can do this by networking with people you already know or by searching the Internet (check out www.about.com and www.ideablob.com). Come up with a list of potential candidates and then reach out to them, giving them permission to tear your idea to bits. It may seem intimidating, but people who know your field will often be more than happy to tell you what’s wrong with your idea!

Weak Example: *A public service expert who thinks that Peace Corps, the model on which my program is based, is a terrific model*

Strong Example: *A veteran teacher who feels that under-qualified teachers are ruining urban schools*

- Schedule a time to speak with the professional and be prepared to ask lots of questions and listen with an open-mind. The purpose of this meeting isn’t to convince the other person of the viability of your idea. Rather, the purpose of the conversation is for you to learn about their concerns. Don’t be defensive (which will likely discourage them from giving you honest feedback) and definitely dig deep to get to the heart of the disagreement. To this end, come up with a list of open-ended questions in advance.

Weak Example: *What makes you think that your idea is better than mine?*

Strong Example: *I understand that you feel a teacher corps model will do a disservice to urban education. I would love to know more about why you feel this is the case.*

- Based on the feedback you get from the professional, complete the following table. Be reasonable in trying to incorporate their suggestions into your work. And then come back to the professional with your responses to see if this changes their opinion of your chances for success.

Objection to your idea	How do you feel about this objection?	What is your response?
<i>Teacher corps de-professionalize the teaching profession</i>	Weak Example - <i>I absolutely disagree.</i>	<i>No need for a response – this is incorrect and needn’t be rebuked.</i>
<i>Teacher corps de-professionalize the teaching profession</i>	Strong Example - <i>I can understand where the expert is coming from and will do more to show how we are dealing with this issue.</i>	<i>We will have a rigorous selection process to ensure that only the top candidates enter the field.</i>

Tool 7: Environmental Scan

Problem: Often applicants design programs with little regard for the current environment in which they are beginning their organization. Looking at the political, environmental, geographic, economic, social and technological factors that could impact their work makes applications stronger and more relevant. Though the Echoing Green application does not address this exercise specifically, analyzing the landscape and environment in which you are beginning your organization will prepare you to give more informed and thoughtful answers.

Solution: When beginning a new project it is not only important to understand who your potential competitors are but also to be aware of what is going on in your field and in the world around you. In order to keep your work relevant and timely, it is imperative for your organization to consider current events and trends that could impact the work you are doing.

Activity: Before you begin your Echoing Green application, we think it would be valuable for you to use the first column of the tool below to identify current events and trends present in the landscape you will be working in. Think about what political, environmental, economic, social, and technological factors could impact the problem you are intending to solve. Below are a few questions you can ask yourself for each section of the tool below.

- *Political:* How does the current political administration feel about your work? Is there any recently passed or upcoming legislation that will affect your work? Are there any recent decisions in the court system that have an impact on your field? What are the political trends on the issue you are tackling?
- *Environmental/Field of Work:* What are the hot topics in your field of work? What aspects of your issue are well recognized in your field? What organizations in your field have recently been founded/merged/closed?
- *Geographic:* What specific factors in your organization's local community/culture will impact your work? Are there certain entities or customs you will have to consider when designing your programmatic activities? Are there any weather or topographical concerns associated with working in this area?
- *Economic:* What are the current economic trends in your community/region/country? How does the current economy affect your constituents or clients? What are the economic conditions that may affect your potential funders?
- *Social:* What is the level of public awareness for your issue? What is driving public awareness of this issue? Does the general public support or oppose the work you propose to do? Has the media covered any controversial stories/opinions on your issue or work? Are there any celebrities, books, films associated with your issue or work? Do you agree with the position they are publicizing?
- *Technological:* What technology/machinery does the population you work with currently use? What upcoming/new technology will be relevant in the next 6 months? How might the technology you currently rely on change in the coming months? Have new social media tools gained popularity among your constituents?

Landscape Analysis Tool

	Factors/Trends/ Current Events	Rationale: Why?	Potential Implications
POLITICAL	<p>Example: One of the presidential candidates strongly believes in the work we are doing.</p> <ul style="list-style-type: none"> • • 	<p>Example: S/he has a personal connection to the issue and has a thorough understanding of the issue.</p> <ul style="list-style-type: none"> • • 	<p>Example: Media attention/political support, if one candidate is elected OR veto power over legislation favorable to your work, if the other candidate is elected.</p> <ul style="list-style-type: none"> • •
ENVIRONMENTAL/ FIELD OF WORK	<p>Example: Many organizations working on HIV/AIDS issues domestically have decreased education programs targeting young people.</p> <ul style="list-style-type: none"> • • 	<p>Example: Industry focus shifted to other high risk populations due to conservative administration's views on abstinence.</p> <ul style="list-style-type: none"> • • 	<p>Example: More youth will need the treatment services my organization will provide.</p> <ul style="list-style-type: none"> • •
GEOGRAPHIC	<p>Example: There is no public transportation in our community.</p> <ul style="list-style-type: none"> • • 	<p>Example: The city is very spread out and building such infrastructure would be costly.</p> <ul style="list-style-type: none"> • • 	<p>Example: Young people without access to vehicles will not be able to attend workshops.</p> <ul style="list-style-type: none"> • •
ECONOMIC	<p>Example: Corporate donations have decreased.</p> <ul style="list-style-type: none"> • • 	<p>Example: The current economic climate has decreased profits for many companies.</p> <ul style="list-style-type: none"> • • 	<p>Example: Competition for corporate donors will intensify and other sources of funds may be required.</p> <ul style="list-style-type: none"> • •
SOCIAL	<p>Example: HIV/AIDS is no longer viewed as a terminal illness by many young people.</p> <ul style="list-style-type: none"> • • 	<p>Example: Anti-retroviral cocktails have eliminated the stark pictures of AIDS patients.</p> <ul style="list-style-type: none"> • • 	<p>Example: The severity of this issue is not top of mind for the general public. Creative marketing tactics must be used to get their attention.</p> <ul style="list-style-type: none"> • •

TECHNOLOGICAL	Example: Increased use of texting by young people to communicate. <ul style="list-style-type: none"> • • 	Example: Quick, easy, and private means of communicating with peers. <ul style="list-style-type: none"> • • 	Example: Texting appointment information to clients of the organization will increase the probability that they will remember to come in for treatment. <ul style="list-style-type: none"> • •
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Understanding the Implications of External Forces

After identifying the external forces that impact the work you propose to do, it is also critical to understand why these factors exist and identify how they directly or indirectly impact your work. Investigate each factor you identified in the first column to try to uncover why they are the norm and what the potential impact on your organization would be. Use the second column of the tool to identify why this is a current or likely factor and the third column to describe how your program might be impacted by changes in the landscape and begin to think about what adjustments you may need to make in order to continue to do your work. Once you’ve filled out the chart, ask yourself: **“Given this analysis, how will I design my program to address the implications I’ve listed?”** Of course, it is impossible to understand and plan for every situation, sometimes things will take you by surprise, but being conscious of the landscape in which you are building your organization is critical to being successful. We recommend that this exercise be repeated on a regular basis throughout the life of your organization.

Tool 8: Financial Planning

On Echoing Green's initial application, we ask "How much money have you fundraised to date? Who is your largest funder and what is the size of the gift? Provide an estimate of your total budget for each of the next two fiscal years." Even though it happens every year, we never fail to be surprised that a number of applicants answer this question by stating that their Echoing Green application is their first application for funding, they haven't yet created a budget and they don't know how much money they need. Clearly they believe this is a reasonable answer. It isn't.

Because Echoing Green funds organizations that are very early in their organizational life cycle, it is acceptable that an applicant hasn't developed a sophisticated, detailed budget model at the time they apply for our funding. However, we fully expect them to have a general understanding of their estimated budget annual budget for the two years of the fellowship. It is absolutely unacceptable when an applicant has done no work to estimate amount of resources they'll need to execute their plan and chooses not to answer the question.

Because Echoing Green grants are fixed amounts rather than needs based, why do we ask about the organizational budget?

In order to truly assess your proposal, Echoing Green needs to understand the scope and the cost of your model. Will your proposed organization operate with a budget of \$75,000 per year for the first two years or will it need to be able to access resources of \$750,000 per year? There isn't a "right" answer to this question. **We aren't automatically impressed by small budget estimates intended to communicate "we are lean and mean" or large budget estimates that project "we are highly ambitious." Rather we look for alignment between the goals of the organization and the applicant's understanding of the potential costs.** The budget estimates also give us insight into the organization's implementation plan and growth plan. For example, a small budget the first year and a significantly larger budget the second year communicates that the first year will likely be spent on planning and program development and that the organization will begin hiring staff and delivering services the second year. You shouldn't answer this question trying to second guess what Echoing Green considers a "right" answer. You need to be thoughtful in determining the actual needs of your organization.

Organizations that are asked to submit a second application to Echoing Green will be required to submit an actual line item budget, not just an estimate of annual expenses. The experts who review the application will analyze the budget to assess if the organization's planned spending aligns with the strategy put forth in the proposal. They may also reference the budget for clarification if parts of the application are not clear. They will be assessing the organizational budget to determine if the proposed organization is an efficient use of resources and to gauge the planned rate of growth.

If I haven't yet started doing the work, how can I calculate projected expenses?

To help applicants to think through their cost model, we have created four different worksheets to reflect the organizational models that we see most frequently in our application process. These worksheets will not produce cost estimates for you but will enable you to identify the types of expenses that you can reasonably expect to encounter in the first two to four years of running your organization. You can then apply cost estimates to each relevant expense category, reflecting market prices for the geographic area where you plan to work and your managerial savvy for cost containment. **Even if none of the descriptions below exactly fits your operational strategy, reviewing the questions can help you to begin to define your cost model. Please note that the work sheets are designed to serve as a guide; not all cost elements will apply to every organization and none of the worksheets will be all inclusive for an organization.**

Once you have created the list of expense items for your organization, you may find that you have no idea how much some of these items will cost. While you can do internet research or call vendors for estimates, in all honesty, the best way to estimate potential expenses is to ask other organizations what they spend for similar items. The social sector is surprisingly open in sharing information with other

organizations they could consider the competition. Use your networking skills to reach out to friends and contacts at similar organizations and ask them to help you to develop cost estimates. Needless to say, you need to be respectful when requesting financial information. Your contacts may not feel comfortable sharing their actual budget numbers or salary structure with you, but they will likely be happy to share information that can help you to develop appropriate ranges for different types of expenses.

I expect to use volunteers and donated items. How do I include that information in my cost estimates and budget?

Many new organizations rely heavily on in kind donations of office space, labor and supplies. If you plan to use donated items and aren't sure whether the value of those items or services should be represented on your budget, there is a simple rule that should guide your decision. Any donated service that is critical to the functioning of your organization must be represented on your budget. You want your budget to reflect the true cost of running your organization so if you would pay for something, be it space, labor or supplies, if it weren't donated to you, you must reflect that cost. For example, once you reach a certain size, your organization will most likely need a place to work. If your organization is able to secure donated work space, the market rate for the rent for that space or comparable space should be reflected on the revenue side of the budget as an in kind donation and the rental expense should be reflected on the expense side of the budget. If an organization receives in kind services that are "nice to have, not need to have", such as a group of volunteers to come in over the weekend to paint their office – a project that the organization would not have invested in had the volunteers not offered to do it and donated the paint and supplies - the organization does not need to reflect those in kind services or related expenses on their budget (although they may wish to describe them in the budget notes).

If engaging volunteers to deliver your program is a critical component of your service delivery model, you may find that including the market value of those services in your budget can make your organization look very expensive. For example, there are organizations that use volunteer lawyers or doctors to deliver services to community members. The market rate for these professional services could be as high as hundreds of dollars per hour. Including the value of these services in the budget could make an organization that operated on a budget of about \$100,000 per year appear more like an organization with an annual budget of \$1,000,000. The rule of thumb described above still applies under this scenario. If your organization wasn't able to secure these professional services on a volunteer basis, you likely wouldn't hire professionals at market rates to deliver them and thus you would never actual incur the expense. In fact, if you couldn't secure volunteers to provide the professional services, you would likely design a very different program. However, you still want your financial information to convey how services are delivered. In this case, we would suggest that you not include the value of the volunteer hours as both revenue and expense items. Rather you should describe the volunteer program and the value of the in kind services in a budget note.

Financial Toolkit

Please reference the appropriate worksheet based on the business model for your organization:

Financial Worksheet 1: Direct Services to Constituents (e.g., medical services, training programs, legal aid, counseling)

- Fellows' examples: Appropriate Infrastructure Development Group, The Reciprocity Foundation

Financial Worksheet 2: Advocacy Organizations

- Fellows' examples: Youth Represent, The Wage Justice Center

Financial Worksheet 3: Organizations Combining Direct Services & Advocacy

- Fellows' examples: Genocide Intervention Network, Workers Rights Law Center

Financial Worksheet 4: Social Enterprise – Creating a Revenue Generating Enterprise that Also Delivers Services/Programming (e.g., creating a business that produces and sells products and uses the proceeds of the business to provide job training and employment to difficult to employ community members).

- Fellows' examples: Hot Bread Kitchen, Skill-Life, Inc.

Financial Worksheet 1: Direct Service

Organizational Stage: for the first year of your fellowship, you and/or your staff will be spending the majority of your time on:

- Planning
- Research
- Program Development
- Program Delivery

What will you be spending the majority of your time on in year 2?

Staffing

Which of the following functions will your organization need/perform in your first two years?

Function	Year 1			Year 2		
	In House	Outsource or Consultants	Volunteers/ Pro Bono	In House	Outsource or Consultants	Volunteers/ Pro Bono
Finance <input type="checkbox"/> Accounting <input type="checkbox"/> Bookkeeping <input type="checkbox"/> Payroll <input type="checkbox"/> Financial Analysis/ Planning						
Communications & Marketing						
Fundraising						
Administrative Support						
Technology Support/Website Management						
Legal Support						
Program Development						
Community Outreach						
Service Delivery Personnel						
Other:						

Based on the functions you describe above, how large of a staff do you envision in Year 1 and Year 2?

Year 1:

- Single employee (or two employees under partnership model): founder(s)
- Founder(s) and consultants for specific projects
- Founders plus Small Staff
- Multifaceted Organization

Year 2:

- Single employee (or two employees under partnership model): founder(s)
- Founder(s) and consultants for specific projects
- Founders plus Small Staff
- Multifaceted Organization

When calculating staffing expenses, be sure to include benefits and payroll taxes for all employees. Depending on the type of organization you are running, the skills and experience of your staff and their responsibilities, you may also need to create a budget for staff education, travel and/or meals and hosting.

If you are relying heavily on donated space/materials, you will need to account for the time and labor to secure the in kind donations and manage the donor relationship. If you are relying heavily on volunteers, be realistic in the amount of staff time required to recruit, manage and motivate volunteers.

Work Place

Where will you work?

- Home Office
- Donated Space
- Rented Space
- The local coffee shop in your neighborhood

Which of the following will you need to support your operations?

- Computers & Office Suite of Software
- Specialized software such as customized data base programs
- Phones
- Internet Access
- Office Furniture
- Business Equipment such as a photocopier, printers, fax machine
- Office supplies
- Postage & Shipping

Legal & Administrative Expenses: Depending on the type of services you are providing, you may be required to protect your organization against certain liabilities

- Liability Insurance
- Directors & Officers Insurance for your Board of Directors
- Background checks for staff members or volunteers (highly recommended and may be required by law if you are working with children or are delivering certain services)
- Incorporation Fees
- Banking Fees

Program Delivery

Where will you deliver you program?

- Donated space (such as a local community center, church or school)
- On site at a partner organization's location
- Rented Space
- Purchased Space
- Over the phone or over the internet

How will constituents reach your services?

- Public Transportation or their own transportation
- My organization will provide transportation
- Services are provided over the phone or via the internet

Which supplies are needed to provide your services (e.g., art supplies for after school programs, books/materials for literacy programs, medical supplies for health programs)? Where will your supplies come from? Do you need to have a budget for shipping supplies to the program site? Will you need to maintain a large inventory of supplies requiring storage space? If you will be receiving donated used or "refurbished" supplies (such as donated instruments for a music program or used professional clothing for

a job training/placement program), you may need to include a line in your budget for making any necessary repairs or cleaning to make the items suitable for use.

Community Outreach and Attracting Resources

Which of the following will you be creating in your first two years to communicate your mission/program to constituents, potential volunteers and/or board members, community partners and donors?

- Web site
- Printed materials such as brochures
- Events for constituents or donors

The cost of all of these items will vary dramatically depending on the intended purpose, the intended audience and the expected outcome.

Web Site Expenses: Web site development expenses can vary widely depending on the sophistication of your design; use of graphics, photos or video; and functionality.

When developing printed materials, you may need to:

- Hire a designer and/or writer
- Purchase stock photography or hire a photographer
- Invest in leasing or purchasing equipment that allows you to create high quality desk top publishing in house
- Hire a printer.

Financial Worksheet 2: Advocacy

Organizational Stage: for the first year of your fellowship, you and/or your staff will be spending the majority of your time on:

- Planning
- Research
- Community Organizing
- Lobbying/Case Work
- Writing and Publishing

What will you be spending the majority of your time on in year 2?

Staffing

Which of the following functions will your organization need/perform in your first two years?

Function	Year 1			Year 2		
	In House	Outsource or Consultants	Volunteers/ Pro Bono	In House	Outsource or Consultants	Volunteers/ Pro Bono
Finance <input type="checkbox"/> Accounting <input type="checkbox"/> Bookkeeping <input type="checkbox"/> Payroll <input type="checkbox"/> Financial Analysis/ Planning						
Communications & Marketing						
Fundraising						
Administrative Support						
Technology Support/Website Management						
Legal Support						
Program Development						
Community Outreach/ Organizing						
Research						
Other:						

Based on the functions you describe above, how large of a staff do you envision in Year 1 and Year 2?

Year 1:

- Single employee (or two employees under partnership model): founder(s)
- Founder(s) and consultants for specific projects
- Founders plus Small Staff
- Multifaceted Organization

Year 2:

- Single employee (or two employees under partnership model): founder(s)
- Founder(s) and consultants for specific projects
- Founders plus Small Staff
- Multifaceted Organization

When calculating staffing expenses, be sure to include benefits and payroll taxes for all employees. Depending on the type of organization you are running, the skills and experience of your staff and their responsibilities, you may also need to create a budget for staff education, travel and/or meals and hosting.

If you are relying heavily on donated space/materials, you will need to account for the time and labor to secure the in kind donations and manage the donor relationship. If you will be engaging large numbers of volunteers, be realistic in the amount of staff time required to recruit, manage and motivate volunteers.

Work Place

Where will you work?

- Home Office
- Donated Space
- Rented Space
- The local coffee shop in your neighborhood

Which of the following will you need to support your operations?

- Computers & Office Suite of Software
- Specialized software such as customized data base programs
- Phones
- Internet Access
- Office Furniture
- Business Equipment such as a photocopier, printers, fax machine
- Office supplies
- Postage & Shipping

Legal & Administrative Expenses: Depending on the type of services you are providing, you may be required to protect your organization against certain liabilities

- Liability Insurance
- Directors & Officers Insurance for your Board of Directors
- Incorporation Fees
- Banking Fees

Program Delivery

The organizations or entities that you will be working with to effect wide scale legislative or policy change are based:

- Locally only
- Locally and Regionally and some local travel will be required
- Mostly outside of my geographic area however in person meetings will be minimal
- Outside of my home area and in person meetings are essential. Heavy travel is required.

How do you plan to use your website?

- For informational purposes only
- To engage different constituency groups in on line dialogues
- To manage large scale organizing efforts such as on line campaigns, petitions or forums

What research tools or resources will you need to be successful?

- Access to free and publicly available information; no or low cost to access but staff time required to research and analyze

- Subscriptions to databases, tools, publications and/or memberships to associations
- Research staff on a contract or full time basis
- Outside experts

Data Management: What sort of systems and processes will you need?

- My work will be data intensive and I will need to invest in standardized systems sooner rather than later
- I can build the systems I need using basic database tools or spreadsheet programs

Community Outreach and Attracting Resources

Which of the following will you create in your first two years to communicate your mission/program to potential volunteers and/or board members, community partners and donors?

- Web site
- Printed materials such as brochures
- Events for constituents or donors

The cost of all of these items will vary dramatically depending on the intended purpose, the intended audience and the expected outcome.

Web Site Expenses (see above): Web site development expenses can vary widely depending on the sophistication of your design; use of graphics, photos or video; and functionality.

When developing printed materials, you may need to:

- Hire a designer and/or writer
- Purchase stock photography or hire a photographer
- Invest in leasing or purchasing equipment that allows you to create high quality desk top publishing in house
- Hire a printer.

Financial Worksheet 3: Direct Service + Advocacy

Organizational Stage:

Will you be developing advocacy programs and direct service programs from day one or will you be initially be focusing on creating and piloting one area of work prior to launching the second area? This worksheet combines the direct service cost elements and the advocacy elements into a single document. Depending on the anticipated size of your staff and access to resources, you may not be planning to launch both program areas simultaneously but instead will stagger them.

For the first year of your fellowship, you and/or your staff will be spending the majority of your time on:

- Planning
- Research
- Direct Service Program Development
- Direct Service Program Delivery
- Community Organizing
- Lobbying/Case Work
- Writing and Publishing

What will you be spending the majority of your time on in year 2?

Staffing

Which of the following functions will your organization need/perform in your first two years?

Function	Year 1			Year 2		
	In House	Outsource or Consultants	Volunteers/ Pro Bono	In House	Outsource or Consultants	Volunteers/ Pro Bono
Finance <input type="checkbox"/> Accounting <input type="checkbox"/> Bookkeeping <input type="checkbox"/> Payroll <input type="checkbox"/> Financial Analysis/ Planning						
Communications & Marketing						
Fundraising						
Administrative Support						
Technology Support/Website Management						
Legal Support						
Program Development						
Community Outreach						
Service Delivery Personnel						
Community Organizing						
Research						

Other:						
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Based on the functions you describe above, how large of a staff do you envision in Year 1 and Year 2?

Year 1:

- Single employee (or two employees under partnership model): founder(s)
- Founder(s) and consultants for specific projects
- Founders plus Small Staff
- Multifaceted Organization

Year 2:

- Single employee (or two employees under partnership model): founder(s)
- Founder(s) and consultants for specific projects
- Founders plus Small Staff
- Multifaceted Organization

When calculating staffing expenses, be sure to include benefits and payroll taxes for all employees. Depending on the type of organization you are running, the skills and experience of your staff and their responsibilities, you may also need to create a budget for staff education, travel and/or meals and hosting.

If you are relying heavily on donated space/materials, you will need to account for the time and labor to secure the in kind donations and manage the donor relationship. If you are relying heavily on volunteers, be realistic in the amount of staff time required to recruit, manage and motivate volunteers.

Work Place

Where will you work?

- Home Office
- Donated Space
- Rented Space
- The local coffee shop in your neighborhood

Which of the following will you need to support your operations?

- Computers & Office Suite of Software
- Specialized software such as customized data base programs
- Phones
- Internet Access
- Office Furniture
- Business Equipment such as a photocopier, printers, fax machine
- Office supplies
- Postage & Shipping

Legal & Administrative Expenses: Depending on the type of services you are providing, you may be required to protect your organization against certain liabilities

- Liability Insurance
- Directors & Officers Insurance for your Board of Directors
- Background checks for staff members or volunteers (highly recommended and may be required by law if you are working with children or are delivering certain services)
- Incorporation Fees
- Banking Fees

Direct Service Program Delivery

Where will you deliver your program?

- Donated space (such as a local community center, church or school)
- On site at a partner organization's location
- Rented Space
- Purchased Space
- Over the phone or over the internet

How will constituents reach your services?

- Public Transportation or their own transportation
- My organization will provide transportation
- Services are provided over the phone or via the internet

Which supplies are needed to provide your services (e.g., art supplies for after school programs, books/materials for literacy programs, medical supplies for health programs)? Where will your supplies come from? Do you need to have a budget for shipping supplies to the program site? Will you need to maintain a large inventory of supplies requiring storage space? If you will be receiving donated used or "refurbished" supplies (such as donated instruments for a music program or used professional clothing for a job training/placement program), you may need to include a line in your budget for making any necessary repairs or cleaning to make the items suitable for use.

Advocacy Program

The organizations or entities that you will be working with the effect wide scale legislative or policy change are based:

- Locally only
- Locally and Regionally and some local travel will be required
- Mostly outside of my geographic area however in person meetings will be minimal
- Outside of my home area and in person meetings are essential. Heavy travel is required.

How do you plan to use your website?

- For informational purposes only
- To engage different constituency groups in on line dialogues
- To manage large scale organizing efforts such as on line campaigns, petitions or forums

What research tools or resources will you need to be successful?

- Access to free and publicly available information; no or low cost to access but staff time required to research and analyze
- Subscriptions to databases, tools, publications and/or memberships to associations
- Research staff on a contract or full time basis
- Outside experts

Data Management: What sort of systems and processes will you need?

- My work will be data intensive and I will need to invest in standardized systems sooner rather than later
- I can build the systems I need using basic database tools or spreadsheet programs

Community Outreach and Attracting Resources

Which of the following will you be creating in your first two years to communicate your mission/program to constituents, potential volunteers and/or board members, community partners and donors?

- ❑ Web site
- ❑ Printed materials such as brochures
- ❑ Events for constituents or donors

The cost of all of these items will vary dramatically depending on the intended purpose, the intended audience and the expected outcome.

Web Site Expenses: Web site development expenses can vary widely depending on the sophistication of your design; use of graphics, photos or video; and functionality.

When developing printed materials, you may need to:

- ❑ Hire a designer and/or writer
- ❑ Purchase stock photography or hire a photographer
- ❑ Invest in leasing or purchasing equipment that allows you to create high quality desk top publishing in house
- ❑ Hire a printer.

Financial Worksheet 4: Social Enterprise

This worksheet is intended to be used for an organization that is creating a business that will use the proceeds from the business to provide social services to a defined set of constituents. In many cases, the work site provides the setting for the delivery of training and services. Examples of social enterprises include but are not limited to:

- Restaurants, Bakeries or Catering Services that teach job skills in the culinary arts to hard to employ members of the community such as formerly incarcerated men or women, at risk youth/young adults or low skilled immigrants. These companies compete with for profit restaurants, bakers and caterers to sell their products and services to the general public or to a defined set of customers. The profits from the businesses are then used to subsidize on site programs such as life skills training, language training, GED classes, etc. Examples include:
 - Greyston Bakery in New York: <http://www.greystonbakery.com/>
 - Café Reconcile in New Orleans: <http://www.cafereconcile.com/index.asp>
- Retailers or distributors that promote and sell products created by artisans either through a store front, web site or through various distribution channels. Examples may include a US company that negotiates with US retailers to sell products developed by women’s collectives in Latin America. Profits from the sale of the products are returned to the community to be used for business training for the women in the collectives and/or scholarships to fund schools for the children in the villages. Examples include:
 - Mercado Global, an organization working with women collectives in Guatemala: <http://www.mercadoglobal.org>
 - World of Good, an organization that promotes fair trade products produced around the world: community.worldofgood.com and www.worldofgood.org.
- Manufacturing concerns that provide job training and skills training, similar to the restaurants and bakeries described above, to hard to employ members of the community such as adults with disabilities or at risk youth/young adults.

Organizational Stage: for the first year of your fellowship, you and/or your staff will be spending the majority of your time on:

- Planning
- Research
- Product Development
- Worksite Selection and Setting Up Production Facilities
- Product Production
- Sales and Marketing
- Service Program Development
- Service Program Delivery

What will you be spending the majority of your time on in year 2?

Staffing

Which of the following functions will your organization need/perform in your first two years?

Function	Year 1			Year 2		
	In House	Outsource or Consultants	Volunteers/ Pro Bono	In House	Outsource or Consultants	Volunteers/ Pro Bono
Finance						
<input type="checkbox"/> Accounting						
<input type="checkbox"/> Bookkeeping						

<input type="checkbox"/> Payroll						
<input type="checkbox"/> Financial Analysis/ Planning						
Communications						
Fundraising						
Real Estate: Site Selection and Acquisition (Production and/or retail space)						
Operations						
Training						
Sales & Marketing to Include Product Development and Product Management						
Administrative Support						
Technology Support/Website Management						
Legal Support						
Direct Service Program Development						
Community Outreach						
Direct Service Delivery Personnel						
Other:						

Based on the functions you describe above, how large of a staff do you envision in Year 1 and Year 2?

Year 1:

- Single employee (or two employees under partnership model): founder(s)
- Founder(s) and consultants for specific projects
- Founders plus Small Staff
- Multifaceted Organization

Year 2:

- Single employee (or two employees under partnership model): founder(s)
- Founder(s) and consultants for specific projects
- Founders plus Small Staff
- Multifaceted Organization

When calculating staffing expenses, be sure to include benefits and payroll taxes for all employees. Depending on the type of organization you are running, the skills and experience of your staff and their responsibilities, you may also need to create a budget for staff education, travel and/or meals and hosting.

If you are relying heavily on donated space/materials, you will need to account for the time and labor to secure the in kind donations and manage the donor relationship. If you are relying heavily on volunteers, be realistic in the amount of staff time required to recruit, manage and motivate volunteers.

Work Place

Where will you work (management functions)?

- Home Office

- Donated Space
- Rented Space
- The local coffee shop in your neighborhood

Which of the following will you need to support your internal operations?

- Computers & Office Suite of Software
- Specialized software such as customized data base programs
- Phones
- Internet Access
- Office Furniture
- Business Equipment such as a photocopier, printers, fax machine
- Office supplies
- Postage & Shipping

If your organization will be producing products, goods or services, where will the manufacturing of these products take place? Where will the services be provided? Will the direct service elements of your program be provided at the work site or at a different location?

Which of the following will be required to support your enterprise?

- Specialized manufacturing/production equipment
- Raw materials
- Product packaging materials
- Inventory space
- Retail space and associated equipment
- Transportation/Shipping to take goods to market

Legal & Administrative Expenses: Depending on the type of services you are providing, you may be required to protect your organization against certain liabilities

- Liability Insurance
- Directors & Officers Insurance for your Board of Directors
- Background checks for staff members or volunteers (highly recommended and may be required by law if you are working with children or are delivering certain services)
- Incorporation Fees
- Banking Fees

Direct Service Program Delivery

How will constituents reach your services?

- Public Transportation or their own transportation
- My organization will provide transportation

Which supplies are needed to provide your services (e.g., books/materials for literacy or language training programs)? Where will your supplies come from? Do you need to have a budget for shipping supplies to the program site? Will you need to maintain a large inventory of supplies requiring storage space? If you will be receiving donated used or “refurbished” supplies, you may need to include a line in your budget for making any necessary repairs or cleaning to make the items suitable for use.

Community Outreach and Attracting Resources

Which of the following will you be creating in your first two years to communicate your mission/program to constituents, potential volunteers and/or board members, community partners and donors?

- Web site
- Printed materials such as brochures

- ❑ Events for constituents or donors

The cost of all of these items will vary dramatically depending on the intended purpose, the intended audience and the expected outcome.

Web Site Expenses: Web site development expenses can vary widely depending on the sophistication of your design; use of graphics, photos or video; and functionality.

When developing printed materials, you may need to:

- ❑ Hire a designer and/or writer
- ❑ Purchase stock photography or hire a photographer
- ❑ Invest in leasing or purchasing equipment that allows you to create high quality desk top publishing in house
- ❑ Hire a printer.

Tool 9: Tapping Into Your Inner Social Entrepreneur

If you are like most social change agents, you will resist or respectfully decline participating in any sort of exercise that focuses on **you** rather than focuses on your work. Once a change agent has had a vision of what the future could be, they are anxious to get working on it immediately. They experience a tremendous sense of urgency and don't feel that they have the time to examine their own motivations or personal needs. Once they begin doing the work, they feel that the spotlight should be focused on the issue and/or the constituents. They prefer to be in the background of the story they are creating rather than the central character.

This mindset makes perfect sense ... to a point. When you are starting a new organization, whether it is driving social change or creating a profitable enterprise, it is important to recognize that you, the founder, are a critical element in the story. **Before you've developed a track record of results, you are asking people to invest in your vision and in your ability to make that vision come to life.** And, in order for any investor to be willing to take a risk in investing their philanthropic dollars in an innovative idea on paper rather than making a more conservative investment in an existing program with proven results, that investor needs to understand who you are and feel that they can trust you with their investment.

You and the Echoing Green Fellowship Application

The Echoing Green application contains a number of questions that are designed both to capture information about the issues and proposed solution **and** to provide our review committee with insights into the motivation, passions, commitment and knowledge of the applicant. In the past, to collect information about the applicant we asked two very direct questions "Why you? Why now?" Many applicants answered these questions with what they thought was a clever reply, "If not me, who? If not now, when?" Even though we no longer ask these specific questions, these responses oddly continue to creep into applications and we strongly caution against using them as justification of your qualifications to lead your proposed organization. If you think about the statement above, not only is it lacking in originality, it doesn't provide the reader with any useful information. In fact, the person reviewing the application may actually be able to come up with a long list of highly qualified candidates in response to the applicant's challenge of "If not me, who?" and the applicant will have done nothing to distinguish themselves from the others on that list.

Should you intentionally craft your application answers to include personal anecdotes and to provide us with telling insights into your character and personality? Yes and no. When used appropriately, personal stories absolutely can be useful information in an Echoing Green fellowship application or any other appeal for funding. However, if including information about your personal history isn't directly relevant to the issue or to the solution or if it feels unnatural, forcing this information into your application isn't the best approach. Instead of attempting to manipulate your answers, we suggest that you set aside a time to think about and answer the questions below. The more in tune you are with your personal connection to the work, your passion and drive, the more naturally it will come through throughout the remainder of your application.

About that resume...

Applicants should present a resume that highlights the relevant skills and experience that they are bringing to their work. The stronger applicants understand that we aren't asking for the resume to complete a generic application check list. We ask for the resume in order to get a better sense of who the applicant is and how well they are prepared to take on the role of leading their proposed organization. **Applicants should understand that they are, in a sense, applying for the job of Executive Director of the organization they are proposing and include an appropriate version of their resume that showcases their credentials for the job.** Weaker applicants include generic resumes that often list job titles, tasks, and, occasionally, career objectives, that aren't relevant to the role they wish to take on. Oftentimes the issue isn't that the applicants aren't qualified. Rather, it is that they haven't taken the time to determine how their past work and volunteer experiences have prepared them for this role.

Deepening Your Self Awareness: Reflecting on the *Why You? Why Now?* Questions

Not all of the questions below directly link to a question on the Echoing Green application. Rather, they are the questions that Echoing Green believes every budding social entrepreneur should reflect upon both when starting on their journey and throughout their journey. By developing a greater self awareness, you will ultimately become a stronger and more effective leader and this knowledge will contribute to the design of a more effective social change organization.

When and how were you drawn to this work?

Things to think about:

- Why this particular issue vs. another issue?
- Is this a new passion or a long time passion?
- Can you trace your inspiration back to a specific moment in time (at Echoing Green we call this a “moment of obligation”) or did it evolve over time?
- What research or activities have you undertaken to make yourself more knowledgeable about this issue?

As a social change agent, you are, no doubt, driven to take on this work in order to address an injustice, to right a wrong. But what is your personal motivation for taking on the additional challenge and risk of launching an innovative new organization? After all, you could have sought a position that would allow you to work on this same issue within a more established organization. If you were to look back on your work in 10 or 20 years, what do you expect will have brought you the most satisfaction?

Things to think about: people find their motivation in different ways. You may find yours among these three different areas:

- Transformative change:
 - Started something that outlived my participation
 - Changed individual lives deeply
 - Created change across a broad community
 - Changed laws or public policy
 - Changed behaviors
 - Ended a problem forever
 - Started a movement
 - Changed how others viewed their work or approached their work
- Professional goals
 - Led a creative and entrepreneurial organization
 - Learned new skills
 - Created several new initiatives or launched multiple organizations
 - Organized community members to be able to help themselves or to take action to better their own lives
 - Developed expertise that I could share with others so they could do their work more effectively
 - Became recognized as an expert in my field
- Personal Growth
 - Developed strong working relationships with my staff and colleagues
 - Maintained or deepened close relationships with my loved ones
 - Expanded my range of knowledge
 - Was a positive role model for others

Why this specific community? How will you establish yourself as a leader within the community where you intend to work or within your field of work?

Things to think about:

- How strong is your connection to this community? Where are your connections the strongest? Among the community leaders or among the community members?
- Do you already have the trust of the community or will you need to gain it? If you need to gain the community's trust, how will you accomplish that?
- If you are from the community where you intend to work, are you already seen as a leader or will other community members perceive it as presumptuous or arrogant if you take on a leadership role?
- If you are from outside of the community, how much time have you spent working in or living in that community? How will you establish your credibility among both community members and others who are working in that community?
- Will your work be perceived as threatening either to community members or to others who work within the community? Who will be your allies or collaborators?

Why are you committed to act on this issue at this time?

Things to think about:

- How long have you been developing your innovative idea for change? If you have been thinking about this for some time and have not yet acted or have only been able to commit to this idea part time, why are you now ready to make a full time commitment?
- Has something in the environment changed (e.g., enactment of new legislation, spike in incidents of disease, release of new statistical data) that makes the need for your work more critical than before?
- Has there been a change in your own life that makes this the ideal time for you to “take the plunge”?

How long are you willing to commit to this work?

Things to think about: We highly recommend that you be brutally honest about your response to this question – no one will see your answer with the possible exception of your coach and then only if you choose to share it. Please note that amongst the answers below we have included responses that we would consider red flags, indicators that you need to seriously consider if this role is right for you at this time or if your commitment is less than what will be required for your proposed organization to be successful.

- Running a start up organization is difficult and requires long hours. Growing and sustaining a social change organization can be just as demanding, or even more demanding.
- This may be your life's passion and you are planning to commit to spending the rest of your career working on this issue. Or you may have many passions and while you are strongly committed to this issue, you feel a calling to work on other issues as well.
- You have a passion for start up organizations but you know that your attention will wane when the organization becomes more established and stable. Your plan is to build the organization to a certain level of stability then to pass it to a new leadership team better equipped to grow and scale the organization.
- You are young and without many attachments. You are willing to commit to the rigorous workload of launching a new organization for now but know that when you decide to have a family, your priorities will change.
- You are simply in a holding pattern right now. You love the idea of running the show and getting the title of “president” on your resume but three years from now you'll be applying to graduate school.

What energizes you?

Things to think about: In order to maintain your stamina, you'll need to identify your energy sources and ensure that your day to day responsibilities enable you to stay energized, rather than drain you. Examples of energy sources may include:

- Motivating and inspiring others
- Seeing tangible results from my work
- The opportunity to change people's minds or helping them to gain a new perspective
- Winning positive outcomes for my clients
- Creating deep, personal connections with others
- Challenging long held beliefs
- Developing creative solutions
- Working with others – OR, conversely – working alone
- Creating something from nothing
- New challenges every day: the chaos of an emerging, constantly changing organization
- Raising money
- Working with others who firmly believe that positive change is possible.

What aspects of this job are you prepared for and where will you need help?

Things to think about: This image of the lone entrepreneur, working away in isolation in their garage until their big breakthrough moment is a myth. The most successful social entrepreneurs are well aware of their strengths and their weaknesses. They play to their strengths and surround themselves with others who can enable them to overcome their weaknesses. They'll either recruit team members who have the strengths that they themselves lack or they'll find a mentor or a coach to help them acquire the skills that they need. The various roles that the leadership of an effective social change organization must take on include but are not limited to:

- Evangelist: The ability to motivate and inspire others
- Visionary: The ability to see possibilities where others do not
- Pragmatist: The ability to get things done
- Recruiter: The ability to find and recruit resources in terms of staff, board members and volunteers
- Team Leader: The ability to engage people and to help them reach their potential
- Fund Raiser: The ability to attract and retain financial support
- Financial Manager: The ability to run an efficient organization and to remain solvent.

Who comprises your personal support network?

Things to think about: most change agents focus their energy on identifying what their constituents need rather than on what they themselves need. The people whom you care about and who care about you will come on this journey with you and will support you every step of the way. They may think you are crazy but they'll support you none the less. But your support system won't simply maintain itself. You need to identify who is in your support network and proactively engage its members in your work. These relationships must be mutually supportive.

Your support network may include:

- The Family You Come From: parents, siblings, grandparents, aunts, uncles, cousins, grandparents, etc.
- The Family You Create: spouses, life partners, children
- Friends
- Professional Colleagues
- Community Members
- Your Staff
- Your Board of Directors

- Mentors and Coaches
- Spiritual Advisors

Tool 10: Making the Pitch

Problem: After going through all the hard work of developing and refining an idea, many applicants are unable to communicate their idea effectively. Then, when evaluators don't understand the idea, they end up rejecting it – regardless of how much time was spent developing it. It is not absolutely necessary to have perfect grammar, but the ideas must get through in a clear and concise manner.

Solution: The top candidates know that how you communicate can be just as important as what you communicate. Therefore, they polish their idea into a brief pitch that they can make to funders, volunteers, and clients whenever called upon to do so. They realize that the Echoing Green application is just a written pitch and, therefore, write their applications just as if they were speaking to a potential funder.

Activity: Develop three paragraphs about your organization that summarize the following points:

- 1) **The problem you are trying to solve**
 - Be detailed and use examples when describing the root cause
- 2) **The solution you are presenting**
 - Explain why it's innovative and why you're confident it will work
- 3) **The goals you will achieve**
 - Be clear about the specific outcomes that will arise from your work

Once you've developed your pitch, apply the "ten-year-old test." In other words, if you were to pitch your idea to a ten-year old and ask him/her to explain what you do, they should be able to do so relatively easily. If they can't do it, you need to cut away the jargon and abstractions and focus on the specific concrete examples that anyone can understand. Once you have your pitch down, you can apply your messaging directly to the questions asked in the first half of the Echoing Green application.

Weak Example: *One big problem in America today is education. Lots of students are not doing well on the NAEP and other value-added measures compared to peer countries - and that spells trouble for the future.*

As a result, we've developed a program that gets better teachers into the schools by recruiting top college students. These new recruits will help students learn better through a focus on learner-driven instructional theory and goal-oriented, standards-based instruction.

In the end, students will do well in school and be able to succeed in the future. And our new teachers will become leaders who will make sure that things continue to improve.

Strong Example: *Imagine that you are a fourth-grader in the low-income Watts neighborhood of Los Angeles. After five years in school, you can still only read as well as the first-graders in wealthy Beverly Hills. And given that you come to school hungry every single morning and that you don't have a quiet place to do your homework each evening, it's hard for you to imagine ever catching up. Plus, the grown-ups who lead your school and neighborhood don't seem to be doing anything to help. As a result, you drop out after eighth grade, never getting anywhere close to college and the opportunities that would provide. Now imagine an entire country full of neighborhoods like Watts, each with thousands of students like the one just described. Clearly, education is our generation's civil rights issue.*

To overcome these student challenges and remedy the lack of educational leadership in this country, Teach For America offers a two-pronged approach. First, we will operate the first and only national teacher corps, attracting the best and brightest recent college graduates to serve in the nation's highest-need schools. By providing an incredibly intense summer training program and then offering high-quality support throughout their corps experience, we will ensure that the vast majority of our corps members achieve significant gains in their classrooms. And, at the conclusion of their corps tenure, we will connect our corps members to a powerful alumni network that will keep them engaged in educational leadership for years to come.

As a result, we anticipate that, in just two years, 80% of all corps members will accelerate their students' learning by at least a grade level and a half each year. And in the same amount of time, we expect that nearly 1,000 alumni will be leading schools, school districts, or educational nonprofits. All of which gives us confidence that one day, all children will have the opportunity to receive an excellent education.

Coaching Guide for Coaches

What is Echoing Green?

Echoing Green is a global social venture fund that identifies, funds, and supports visionary leaders with bold new ideas for social change. Our Fellows create groundbreaking public service organizations that are innovative, replicable, sustainable, and committed to catalyzing positive social change. Over the past 20 years, we have invested over \$26 million to help 450 social change agents in 30 countries.

Echoing Green believes in thinking without boundaries. We support organizations domestically and internationally. Our Fellows work in all public service areas including but not limited to education, youth development, health, housing, environmental justice, civil and human rights, economic development, social justice, the arts, and immigration. Furthermore, Echoing Green has funded some of the most successful new organizations across these areas – from Teach For America to City Year, from Earth Rights International to the Gay-Straight Alliance Network.

What is the Echoing Green Fellowship?

Through our two-year Echoing Green Fellowship program, we provide start-up capital and technical assistance to help new leaders launch their organizations and build capacity. We offer:

- A grant of up to \$90,000, paid in four equal installments over two years
- A health insurance stipend
- Conferences led by organizational development experts
- Access to technical support and pro bono partnerships to help grow your organization
- A community of like-minded social entrepreneurs and public service leaders

What is an Echoing Green applicant coach?

An Echoing Green applicant coach is an advisor to a potential fellowship applicant. If you agree to serve in this role, you would review your candidate's application prior to submission and provide advice to help the candidate make their application as competitive as possible.

Why would a candidate need a coach?

Last year, Echoing Green received nearly 1,500 applications for just 20 fellowships. In such a competitive pool, the top candidates stood out not just by demonstrating a good idea or a passion for their work, but by sharpening their applications through an intense vetting process. And thus, this year, we recommend that all candidates serious about competing for a fellowship go through a similar review process *prior to submitting an application*. To this end, a coach is the single most valuable applicant resource in that he/she will allow a candidate to develop and fine-tune their application, just as past fellows have.

Would I be a good coach?

To determine whether you could be a good coach, consider these two questions:

- Do you have 10-20 hours to spend on coaching over the next two weeks?
- Can you provide honest, critical feedback to the candidate?

Truly, these are the most important indicators of good coaching potential. Indeed, the two leading reasons that coaching relationships fail are lack of time (good coaching takes time!) and an inability to criticize (a common issue when you know the candidate well). You need not be an expert in the candidate's field (an outsider's opinion is often more valuable, given that some of the evaluators reading the application may be laymen as well), nor are you required to have deep coaching experience.

How do I get started?

If you feel that you can serve effectively as a coach, you'll want to follow these steps:

- 1) Ask the candidate for the date on which you can expect to receive their draft application (make sure that this date is well ahead of the application deadline – December 1, 2008). Schedule several hours in the following week to read through their work, as well as a two-hour meeting afterwards to discuss your feedback.
- 2) In the meantime, learn more about Echoing Green by visiting www.echoinggreen.org and looking through the Fellowship section. In particular, we recommend that you review examples of past fellows at <http://www.echoinggreen.org/fellows>.
- 3) For additional insight, you may review the applicant's preliminary application planning. There are several tools available in the Applicant Coaching Guide that helps them develop their idea in anticipation of completing the application. Look through these for thinking that is clear and logical and let them know if any of their work doesn't make sense.
- 4) Once you receive the application draft, review it in light of the Application Critique Guide for Coaches. As described in this tool, you'll want to make sure that the application is clear, specific, and compelling. Take detailed notes so you can share these with the candidate.
- 5) At your meeting with the candidate, please be brutally honest. Chances are that, if you couldn't understand the application, neither will Echoing Green. Thus, it's in the candidate's best interest for you to tell them the truth now – before they have to hear it from us. But also be constructive; if the application is illogical, help them figure out how to fix it. Depending on the amount of time you can devote to coaching, it would be useful to go through several feedback/revision cycles. At the very least, you should review the application twice – once for content and once for style:
 - 1) Review for Content
 - a. Logic – “I don't understand how this specific environmental education program will lead to a reduction in global warming.”
 - b. Clarity – “I can't figure out what your environmental classes will actually teach.”
 - c. Persuasion – “I don't see the need to open a new environmental organization.”
 - 2) Review for Style
 - a. Jargon – “What does ‘value-added post-assessment score’ mean?”
 - b. Mechanics – “There's too much passive voice in your application.”
 - c. Spelling – “‘Polution’ is spelled incorrectly.”

We know that this is asking a lot. However, starting an effective social change organization is both one of the most important and one of the most challenging things an emerging leader can take on. And thus, this opportunity and responsibility should not be taken lightly!

That said, if you decide to fulfill this critical role, you have our deepest gratitude for helping to guide the development of a new enterprise that can potentially improve the lives of those most in need. Should you require any support in this role, please do not hesitate to reach out to us at apply@echoinggreen.org.

Thank you,



Heather McGrew
Vice President, Fellow and Alumni Programs

Application Critique Guide for Coaches

Echoing Green strongly encourages all applicants to have their applications reviewed multiple times before submitting it online. This ensures that their ideas are clearly stated, realistic and compelling. Applications cannot be revised once they are submitted. As a Coach, it is imperative for you to give the applicant honest feedback so they can improve their chances of receiving our Fellowship. The questions on pages three and four are designed to help you provide more comprehensive feedback on the application and the organization being proposed.

Common Mistakes

Because Echoing Green receives such a high volume of applications for a comparatively small number of fellowships, our application process is very competitive and each applicant is carefully considered. We understand that most applicants work hard on their application; however mistakes are still made by a large number of applicants. Below is a list of the most common mistakes that will greatly decrease an applicant's chance of being considered for future rounds:

- **Fails to submit a résumé/CV or submits an inappropriate résumé/CV:**
Because there is a limited amount of space in the application to explain qualifications, we ask for a resume so we can see an applicant's entire professional and academic history. Without a resume, we are incapable of properly evaluating the applicant's leadership and entrepreneurial experience. Resumes and CVs should include information relevant to their proposal; it should be presented as if the applicant is applying for position of Executive Director. Examples of inappropriate resumes include:
 - Resumes that are too long
 - Resumes that don't focus on relevant skills or experience
 - Resumes with objectives that are not in line the proposed organization
- **The project's mission is difficult to understand:**
Often, we read applications for projects that are either too broad or too focused or have vague mission statements. If an organization cannot design a clear mission, it is unlikely it will achieve the goals it was created to accomplish.
- **The need for the project is not clearly stated:**
Simply saying the organization is necessary because "an organization of this type does not already exist" is a weak and insufficient answer. By conducting research and stating relevant statistics and facts, applicants do a better job at explaining the problem at hand and why their organization is necessary to address it.
- **The organization does not seem innovative:**
As one of the most important parts of the application, innovation is a concept many applicants struggle with. There is a tendency for applicants to solely state the objectives of their program, rather than describe what sets their organization apart from others within the same field. Again, with more research, applicants should be able to illustrate what makes their organization and their methods innovative and an improvement to current practices. This makes for a much stronger application.
- **The proposed plan is not realistic or feasible:**
Although we encourage applicants to "think outside of the box" with their programs and ideas, it is not a good idea to propose a program that is completely unfeasible. When the proposed size of the organization doesn't match up with its potential impact, it is a sign that perhaps the applicant is taking on too much with their available resources.

- **Applicant has no clear plan to identify and measure impact:**
Without a way to measure changes, there is no way to determine if the program is achieving its goals. It is important for applicants to devise a mechanism they will use to evaluate outcomes based on the impact of their organization.
- **Applicant does not have sufficient relevant experience:**
It is great when individuals or groups of people have the desire to develop a program aimed at creating sustainable social change; however if those people do not have the experience necessary to run an organization, donors are less likely to invest in their project. With more experience, especially with the population or problem being affected, applicants' chances of success are greater.
- **Applicant uses clichés, like “teach a man to fish, feed him for life”:**
The overuse of clichés is strongly discouraged. They do not enhance the application and they have a tendency to confuse readers. Applications are less competitive when too many clichés are used.
- **Applicant does not give a budget estimate for organizational costs:**
“I don't know” is not an acceptable answer for this question, and applicants who do not give a well thought out answer will not be considered for future rounds. The purpose of this question is to force applicants to seriously consider their organizational costs so they know approximately how much money will be needed for their program to function properly.
- **Applicant doesn't seem passionate about their program:**
If an applicant doesn't seem passionate about their organization or program through their answers, we have less reason to believe that they are likely to maintain the program when faced with difficult challenges. Applicants who can display their enthusiasm have a competitive edge over those who do not seem eager or passionate about their new endeavor.

Reader Critique Tool

Scale:

0 = Major Difficulty, Incomprehensible/Poor
 1 = Needs Improvement

2 = Satisfactory
 3 = Very Good
 4 = Excellent

Does the applicant write in a professional tone? (We define a "professional" tone as one that is sincere, writes at a suitable level of difficulty, uses unbiased language, and uses appropriate emphases on words)
Circle one: 0 1 2 3 4 Comments
Are the elements of the applicant's proposal easy to explain to others?
Circle one: 0 1 2 3 4 Comments
Do you feel that each answer provides you with new information or insight?
Circle one: 0 1 2 3 4 Comments
Did you have to read any of the answers multiple times in order to understand the meaning?
Circle one: 0 1 2 3 4 Comments
Does each answer, from the beginning to the end of the application, follow a logical flow?
Circle one: 0 1 2 3 4 Comments
Does the applicant overuse clichés or jargon?
Circle one: Yes No Not Sure Comments
While reading the application, did you feel like you got to know the applicant?
Circle one: 0 1 2 3 4 Comments
If the applicant used statistics to illustrate the need of their organization, were the statistics relevant and compelling? Often times, if applicants are unsure of which statistics are significant to the problem, they tend to use statistics that are loosely connected to their work.
Circle one: 0 1 2 3 4 Comments
Does it appear that the applicant has done research on this subject?
Circle one: Yes No Not Sure Comments

Does the applicant acknowledge other organizations in their field and give logical comparisons?
Circle one: Yes No Not Sure Comments
Is it clear that the applicant understands the difference between the root cause and symptoms of the issue?
Circle one: Yes No Comments
Is the applicant specific about who and how many will be served through his/her organization?
Circle one: 0 1 2 3 4 Comments
If personal or client stories are used, do they enhance the application?
Circle one: Yes No Not Applicable Comments
Does the applicant have a realistic way to measure the impact of his/her organization?
Circle one: 0 1 2 3 4 Comments
Based on the application and résumé, does the applicant have sufficient leadership and entrepreneurial experience to run this organization?
Circle one: 0 1 2 3 4 Comments
Are the applicant's short and long-term goals feasible?
Circle one: 0 1 2 3 4 Comments
Does the applicant provide a realistic two-year budget estimate that makes sense given both the goals for the organization and the number of people they plan to serve?
Circle one: Yes No Not Sure Comments
Has the applicant presented a new and creative approach to the issue they are addressing and do you believe this organization could influence how others work in similar fields?
Circle one: Yes No Not Sure Comments
Does the proposed size of the organization match its desired impact?
Circle one: 0 1 2 3 4 Comments