

**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.