I. Engagement with others

Recall the alum's presentation in class 3, in which s/he'll have shown how she went on to develop and apply her Practicum research.

See also miscellaneous outreach information in this section.

BRIEFING

Shelly Billingsley

What is Dialogue?

Definition

According to Linda Ellinor and Glenna Gerard, "Dialogue is about looking beyond the superficial and automatic answers to our questions. Dialogue is about expanding our capacity for attention, awareness and learning with and from each other. It is about exploring the frontiers of what it means to be human, in relationship to each other and our world" (see source list)

David Bohm traces the roots of Dialogue to the Greek "dia" and "logos" which means "through meaning".

(According to The Dialogue Group, (1995) the following text has been excerpted from the writings of Glenna Gerard and Linda Loomis Teurfs of The Dialogue Group. (see source list)

It is often helpful to look at dialogue and how it differs from discussion. In a dialogue, the end goal is to achieve some new understanding or collective meaning through a group of people interacting. It seems to foster a sense of community through out the group after time. A discussion breaks down a freeflowing conversation into fragments or parts. There is an emphasis on persuasion and "winning" to get others to fully see a certain perspective or viewpoint.

DIALOGUE	DISCUSSION
To inquire to learn	To tell, sell, persuade
To unfold shared meaning	To gain agreement on one meaning
To integrate multiple perspectives	To evaluate and select the best
To uncover and examine assumptions	To justify/defend assumptions

Behaviors That Support Dialogue

Focus on shared meaning
Listen to yourself, to others and for emerging patterns
Speak when moved from a deep place within
Let go of expectation for outcomes or resolutions
Respect and appreciate differences
Use inquiry with reflection
Respond from a point of stillness
Pause before speaking
Speak to the group, not individuals

Suspend roles and status
Share responsibility for the process
State openly your assumptions
Detach yourself from your judgements
Describe your reasoning process
Recognize the limitations of reason

Example of a Dialogical Activity

Working on Assumptions

Purpose: To increase people's awareness of the nature of what remains unspoken in their interactions with others. Because much of what is unspoken and the reasons why it remains so are related to assumptions.

Materials: A sheet of paper and pen for each person

Process:
1. Ask each person to perform the following reflection: Think of an interaction with someone that you were involved with recently that was less than satisfactory. Recommend that they chose something that is important, but that they feel comfortable sharing with a partner.

2. On a blank sheet of paper, draw a line down the middle. On the right side, write down the conversation that took place between you and the other person. Write it down exactly as you remember it.

3. Go back and in the left column, write what you were thinking and feeling, but did not communicate during the conversation.

4. Once both columns have been completed, ask each person to find a partner to work with. Together, consider the following questions: Act as coaches for each other to discover the hidden assumptions, disconnections between intentions and results, etc.

- What is the nature of the material in the left-hand column? How would you describe it?
- Why do you withhold the information in the left-hand column?
- What might be some possible impacts of withholding the information on results? On relationships?
- What do you think might have been in the left-hand column of the other persons?
- If you could replay the interaction, how might you bring more of the left-hand column into the conversation?
- From this exercise, what have you learned about your assumptions?

This activity can be used in a variety of settings. I have learned of two specific examples. One was in a literature group in an elementary school. The students were using this method to analyze characters actions from their points of view. Another example stemmed from a corporation; the activity was used to guage how well customer service was and what complaints could be rectified.

Recommended Readings

Bohm, David and Edwards, Mark. Changing Consciousness, Exploring the Hidden Source of the Social, Political and Environmental Crises Facing our World. Pegasus, New York, NY. 1992.

Bohm, David. Unfolding Meaning: A Weekend of Dialogue with David Bohm. Ark Paperbacks, 1985.

Ellinor, Linda and Gerard, Glenna. Dialogue, Rediscover the Transforming Power of Conversation. John Wiley & Sons, New York. 1998.

Freidman, Maurice. Dialogue and the Human Image: Beyond Humanistic Psychology. Sage Publications, Newbury Park, CA 1992.

Isaacs, William. Dialogue and the Art of Thinking Together. Doubleday, New York. 1999.

Loomis Teurfs of The Dialogue Group, 1995 manuscript

http://www.dialogroup.com/dialogroup/

BRIEFING

Harriet R. Griffin
Briefing- 11/8/99

The Basics of Grantseeking

All of the resources cited in the bibliography provide information on the basics of grantseeking. Andy Robinson's book, Grassroots Grants-An Activist's Guide to Grantwriting, gives particularly good advice on acquiring social service grants.

Developing Relationships

Experts on grantseeking seem to agree that if you want to raise money through grant proposals, one of the most important things you can do is to establish and maintain strong, "peer-to-peer relationships with the decision-makers" (Robinson, 56). Building a quality relationship becomes the biggest challenge. Although power inequities exist in the grantseeker- grantmaker relationship, grantmakers generally appreciate being treated as equals. They value being part of an on-going dialogue with real people who want their input about many issues. Grantmakers lend support to people they come to know; they provide funds to those they see as having the ability and drive to successfully pursue and complete innovative projects.

Grantseekers for projects for important social causes must acknowledge and address the need to secure funding. Anne Firth Murray of the Global Fund for Women says that "we need to begin to feel empowered to gain access to those resources for our causes" (Robinson, 1). Grantseekers must be professional. Thorough and accurate preparation should be coupled with courtesy and respect. Grantwriters should be both project developers and critics. Their goal is for grantmakers to see *your* causes as *their* causes. John Powers of the Educational Foundation of America uses the following five criteria to evaluate a proposal:

*Is the issue important to me?
* Does this project have realistic and effective goals and approach?
*Is the timing appropriate (urgent and important)?
*Is this the best group to undertake this issue and project?
*Given limited resources, does this group really need our money? (Robinson, 15)

Advocacy for the project should continue long after the proposal is submitted. Grantseekers, along with colleagues and others with influence, need to continue to communicate that the project will be completed by individuals who are competent, knowledgeable, and easy-going. There must be evidence of a commitment to move ahead on the project, whether or not the grant is awarded; however, it should always be inferred that the grant is crucial to the advancement of the project.

Writing a Proposal

Grantwriters should be careful to follow application guidelines. Careful consideration should be given to words and layout. A clear and concise proposal is one that avoids unnecessary jargon and is easy to read in 12-point or larger type. Employing a variety of techniques, such as italics and bullets, helps to keep the reader's attention. Stories in the voices of people who will benefit from the program are effective and appropriate additions to a social action proposal.

Basic components of a grant proposal include:
- Cover page and executive summary
- Organizational history
- Problem statement
- Program goals and objectives
- Strategy and implementation
- Timeline
- Evaluation
- Personnel
- Budgets
- Attachments
- Cover letter

Cover page and executive summary comprise the first page. The cover page includes the title of the project, submission date, beginning and ending dates for the project, total project budget, amount requested, and contact persons and phone numbers. The executive summary describes the need and the proposed ways to address the need.

Organizational history tells something about the group and why it is uniquely prepared to do the proposed project.

Problem Statement explains the problem in such a way as to show how your particular group would be successful in constructing the best possible solutions. The problem is clearly defined, creates empathy for real people, and is broken down into specific issues and reasonable strategies.

Program goals restate the need in terms of long-range benefits of the project **and objectives** list measurable outcomes of the proposed project.

Strategy and implementation describes how you are going to carry out the plan to create change. It gives a detailed explanation of the methods to be used.

Timeline indicates when your objectives will be met. It is sometimes helpful to state workable deadlines within the timeline.

Evaluation shows the success or failure of the program in measurable terms. Grantmakers should see the impact of their funding; grantwriters should use what they have learned to promote other projects.

Personnel gives short biographies or resumes of main project staff.

Budgets should itemize expenses, show monies on hand, and project expected revenues. It should include the amount requested from the particular grantmaker.

Attachments include other items such as an IRS tax-exemption letter, a list of board members, a current newsletter, or letters of support. Only those items requested should be included with a proposal.

Cover letter is the first thing the grantmaker sees. It connects grantmaker to grantseeker. This letter reminds the reader of any previous communication, states the amount of money requested, describes the mission of the organization and why the project is important, and offers to provide additional information. It should never include information not given somewhere else in the proposal.

Harriet R. Griffin
The Basics of Grantseeking
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Advice on preparation of master proposal before approaching funders.

Golden, Susan. Secrets of Successful Grantsmanship: a guerrilla guide to raising money. Jossey-Bass Nonprofit Sector Series, San Francisco, CA: Jossey-Bass, 1997.
This book presents guidelines for preparing grants and gives examples of grants.

Miner, Lynn. Proposal Planning and Writing. Phoenix, Arizona: Oryx Press, 1998.
Miner provides a step-by-step approach to writing proposals.

Robinson, Andy. Grassroots Grants-An Activist's Guide to Proposal Writing. Oakland, CA: Chardon Press, 1996.
This book provides a wealth of information for acquiring social service grants.

Watkins, Christopher, ed. "The Grant Advisor" monthly newsletter. Linden, Virginia.
This newsletter gives ideas for developing, evaluating, and budgeting for successful proposals. It includes a list of common problems to be avoided when writing proposals.

Resources on the Internet (from Robinson, Andy. Grassroots Grants listed above)

http://fdncenter.org	The Foundation Center
http://www.cof.org	The Council on Foundations
http://www.foundations.org	Foundations On-line
http://www.nsfre.org	National Society of Fund Raising Executives
http://www.nptimes.com	The NonProfit Times
http://www.clark.net/pub/pwalker/	Nonprofit Resources Catalogue
http://www.igc.org	Institute for Global Communication
http://www.webactive.com	Web Active
http://www.nonprofits.org	Internet NonProfit Center

BRIEFING

Kelley Freeman
Practicum – Briefing
October 16, 1998

Participatory Action Research

Participatory action research (PAR) is research that involves the identification of a problem in collaboration with those most affected by it. Together, researcher and participants plan actions to remedy the problem, implement a plan, observe the results, and reflect with the possibility of taking new action. PAR has been described as "an informal, qualitative, formative, subjective, interpretive, reflective and experiential model of inquiry." (Hopkins, 1983) It is in contrast with traditional quantitative methodologies because it attempts to effect social change through the marriage of theory, research and practice.

Although PAR itself is not a research method, it is an approach to research that is mindful of the need to include all participants in a cycle of planning, action, observation, reflection and most likely revision and refinement. This cyclical element allows for deeper understanding of the research issue and its outcomes. It is a learning process for all involved.

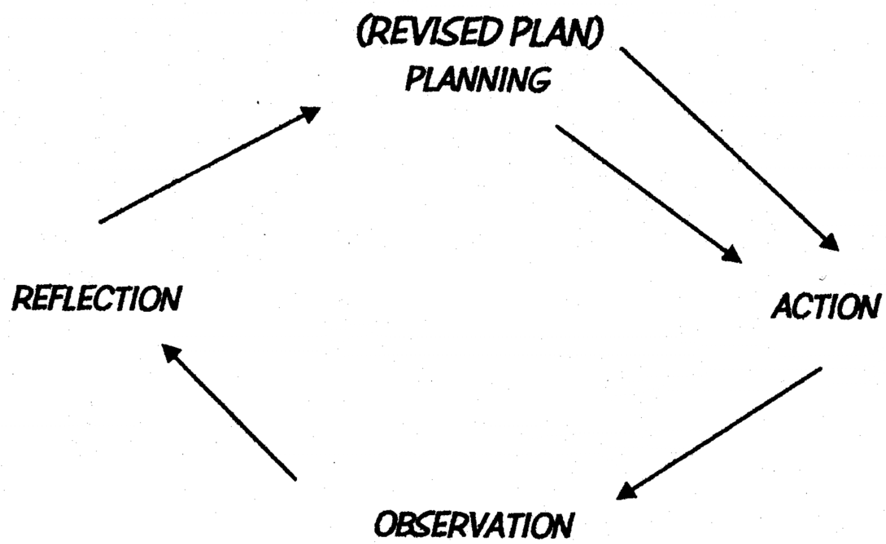
Participatory action research is...

- *Critical, collaborative enquiry by*
- *Reflective practitioners who are*
- *Accountable in making the results of their enquiry public*
- *Self-evaluative in their practice and engaged in*

Participative problem-solving and continuing (professional) development
(Zuber-Skerritt, 1982)

The key components of PAR, – planning, action, observation, reflection and possibly revision, are diagrammed below.

Cyclical Flow of PAR



There are a number of benefits in using participatory action research. They include:

- gapping the bridge between theory, research and practice
- direct experience and learning for all involved
- practical use in the community, school, workplace or health organization involved
- increased understanding of the problem and it's solution
- involvement of those most affected and interested

There are also a number of downfalls to using PAR. They include:

- a responsibility for change as well as research
- use of a little known strategy

- *difficulty in evaluation*
- *unpredictability of the process and relevant information*
- *more time consuming than traditional research*
- *writing up the results usually doesn't fit the conventional formats of research*

Of course, you must weigh the costs and benefits of using PAR in your particular research project. There is plenty of information on participatory action research, also known as action research, which can be found easily on the Internet and a number of books published on the subject.

Web sites

http://www.phy.nau.edu/~danmac/actionrsch.html
http://www.parnet.org/home.cfm
http://www.womenink.org/research.html
http://currie.uncg.edu/~wbeasley/action.html#ACTION_RESEARCH_CYCLE
http://www.research.cornell.edu/outreach/programs/PARN.html
http://uac.rdp.utoledo.edu/comm-org/research.htm

Books

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Kemmis, S. and McTaggart, R. "The Action Researcher". Third Edition. Deakin University Press: Victoria, 1988.

Susman, G.I. and Evered, R.D. "An Assessment of Scientific Merits of Action Research". *Administrative Science Quarterly* 23, (1978): pp. 582-603.

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Action research links

Links to action research (and other) resources elsewhere

A deliberately selective list of sites offering links and resources relevant to action research, action learning, and other related topics

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Action research

PARnet

PARnet is the Participative Action Research Network at Cornell University. One of the key action research sites in North America, it offers valuable resources and links to other sites. It is maintained by Carla Shafer

CARE

An important UK action research site located at the University of East Anglia, it offers resources, and links to other web sites, among other topics

ARoW

Action Research On the Web is a web-based university course in action research offered by the University of Sydney and maintained by Ian Hughes

CARN

The Collaborative Action Research Network site is to be found at the University of East Anglia. Among other things, this network offers a discussion list for subscribers

CARPP

The Centre for Action Research in Professional Practice, associated with Judi Marshall, Peter Reason and Jack Whitehead at the University of Bath, UK

Other action research resources are to be found at a number of sites:

- Tobias Brown's papers on action science, Chris Argyris' action research methodology
- Paul Harvey's page, with a growing collection of his own work, and links to elsewhere

- Martin Ryder's collection of action research papers
- Jack Whitehead's home page, with a variety of resources including theses, and links to other home pages
- Judith Newman's home page "Action research: educating as inquiry", with some of Judith's own writing and some by other teachers

(There are many other sites. Follow the links from the sites listed on this page. Do a search on "action research" using one of the internet search engines. Ultraseek gives me the best results)

[top]

[continued below...

Action learning

✦ Action learning international

A sibling site at IMC, with substantial action learning resources, and links to international action learning sites

✦ International Management Centres

International Management Centres' headquarters at Buckingham

✦ ALARPM

The Action Learning Action Research and Process Management Association Inc offers its members networking with those with similar interests, and publishes related books, journals and monographs

✦ IFAL

The International Federation for Action Learning. I've listed its UK site here because of its various offerings, including links to other sites, and various resources. There is also an international site

[top]

Other related sites

✦ QualPage

Judy Norris' qualitative research page at the University of Alberta is a valuable collection of a variety of resources and links for qualitative researchers generally. Some AR resources are included; in any event, many of the qualitative research resources are relevant to action researchers

✦ HEPROC

The HEPROC ("Higher Education Processes") site contains a large variety of well organised resources for education and educational research

BRIEFING

CCT 698
Practicum Briefing
Fall '98, Catherine Weber, Teresa Castro

Facilitation of Group Process:
1. Groups defined and described
2. Macro: Facilitation described
3. Micro example: Facilitation of peer support, social change groups described
4. Bibliography

1. Groups defined and described

Group definition: Two or more individuals in face-to-face interaction, each aware of his or her membership in the group, each aware of the others who belong in the group, and each aware of their positive interdependence as they strive to achieve mutual goals.

Stages of Group Development
1. Forming—members become oriented towards each other
2. Storming—members confront their various differences; management of conflict is the focus of attention
3. Norming—group develops consensus regarding a role structure and a set of group norms
4. Performing—group works as a unit to achieve group goals
5. Adjourning—the group disbands

Types of groups

Pseudo—group of members who have been assigned to work together who have not interest in doing so.

Traditional—a group whose members agree to work together, but see little benefit in doing so.

Effective—a group whose members commit themselves to the common purpose of maximizing their own and each other's success.

High Performance—meets all the criteria for being an effective group and outperforms expectations.

Qualities of an effective group
- Strong mutual goal
- Positive interdependence
- Promotive interaction
- Strong membership
- Strong Mutual identity
- Positive relationships

2. Facilitation described.

Flow of group facilitation

1. Entry--Clarify expectations; assess culture, values, issues; contract with group;
2. Setting the climate--establish roles and expectations; develop norms;
3. create mission, vision and objectives
4. Doing the work--achieving the objectives of the group

Basic procedures for structuring discussion groups:

1. Specify objectives
2. Select appropriate group size
3. Assign participants to groups
4. Arrange room
5. Distribute materials
6. Assign roles
7. Explain the cooperative goal structure and the task
8. Observe and monitor behavior of group members
9. Intervene to teach needed group skills
10. Evaluate quality and quantity of group productivity

Skills of facilitation

- set learning goals and expectations
- conduct activities based on the group's stage
- bring out group members ideas, not your own.
- direct conversation with strategic questioning

3. Micro example. Facilitation of peer support, social change groups described.

Social Change Groups tend to involve:

1) Deconstruction of the social context. Making the connections between our personal experiences and our political realities.
2) Taking action to shape our social context. Creating alternatives to those realities we find unacceptable.
3) Facilitation rooted in distributed authority and distributed responsibility. Helping people help themselves.
4) Using peer support and respectful collaboration to develop community.

Empowerment: (as defined by Julian Weissglass) the process of supporting people 1) to construct new meanings and 2) to exercise their freedom to choose new ways of responding to the world

For those of us who want to imagine beyond traditional or dominant, social frameworks it is important to be able to participate in communities where we can share support for our ideas. Integral to any social change group is the ability to deconstruct how social and discursive practices circumscribe what we can say, do and become within an historical moment. These groups try to develop alternative approaches for understanding and responding to the world, and in doing so perhaps change it.

Facilitating authority building
Distributed responsibility and distributed authority. In groups working from the distributed responsibility/authority model, facilitators act as advocates not experts. They focus on helping members help themselves. Facilitators provide support and, when asked, share their own experiences. In this context, group members are encouraged to define and initiate the changes that they want to make in their lives and their communities.

Many of us have been trained to understand authority as other-centered, as located in an institution, discipline, scholar, or teacher. Yet life requires that we not only possess the ability to articulate our desires, needs, and goals but also the ability to define the strategies needed to meet those goals.

Facilitating Assessment and evaluation
One way to facilitate authority building is to facilitate a process of self-assessment and evaluation. The process of assessing our own needs and goals is an opportunity to take possession of our development. When we are encouraged to decide what we want to learn and how we want to challenge ourselves, we have the opportunity to develop a directorial stance toward our own lives. And when we learn to how make our own choices, we become less dependent upon external authority figures.

Peer Support
The process of sharing experiences and working on solutions as a group can prove empowering in several ways. In our society, many people feel alienated from traditional forms of community. This can result in feelings of isolation. However, when people come together to share their experiences and thoughts, they begin to break the isolation upon which various forms of oppression depend. Furthermore, through peer support people can act as resources for each other. When we receive and also give support, we begin to learn what we have to give.

Facilitating Constructive Response
Group sharing tends to work best if a facilitator ensures that response remains grounded, specific, and sensitive. A grounded response doesn't pretend to speak from some universal or external criteria of judgment. When we make ownership of our responses explicit, it is easier for others to decide whether our responses are of use to them. Furthermore, general responses are not as useful as specific ones. 'You're idea is great!,' is fine but best when followed by a deeper analysis that helps a person understand why the idea is great, and why it elicited such a positive response.

Facilitating Collaboration
Working collaboratively can be an extremely generative means of building community and also confidence. Sometimes when we are learning something new, we feel more willing to take risks if we're not alone in the process. Below are some guidelines for facilitating respectful collaboration.[3]

A. Be willing to try on other people's ideas, content or process.
B. It's okay to disagree. It's never acceptable to shame, blame or attack.
C. Self-focus. Try to remain present to your responses, emotions, etc.
D. Practice both/and thinking verses either/or thinking.
E. Take responsibility for your own learning process. You are both learner and teacher.
F. Confidentiality surrounding personal sharing is integral to safe group process.

Facilitating heterogeneous groups
Robust s change groups tend to be inclusive and heterogeneous. In a society based on competition and hierarchy, people of different social locations are often pitted against each other to fight for access to scarce resources. Yet solidarity between people of various social locations is important if any particular population wants to create lasting social change. To develop truly heterogeneous communities, facilitators need to be able to acknowledge (versus ignore) difference while also being able to acknowledge the connections between different members. Below are some guidelines for facilitating group process which value respectful reciprocity within difference. [5]

A. Be willing to rethink 'universal' truths.
B. Acknowledging differences is as important as acknowledging connections. Try not to collapse or over-simplify boundaries in the interest of quick *we's*.
C. Understand the multiplicity of social locations—the complexity of oppressor and oppressed in each of us.
D. Beware of appropriating the good and ignoring the struggle within another person's social location—don't be a culture vulture.
E. Don't be too quick to fit others into your framework (cookie-cutter epistemology).
F. Don't ignore the complex world and tradition from which others speak.
G. Amnesty and Forgiveness: Ignorance is forgivable if we are willing to redress it.

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Ueland, Brenda. *If You Want to Write* (Saint Paul: GreyWolf Press, 1987)

I. Endnotes

1. This list was taken from the Episcopal Divinity School's guidelines for groups—"on becoming more comfortable with difference" (E.D.S., Cambridge, MA). The list has been altered slightly for the purposes of our briefing.

2. This list was taken from Professor Kwok Pui Lan's lecture on Cross Cultural Hermeneutics, at the Episcopal Divinity School. Once again, the list has been altered slightly

BRIEFING

HOW TO WRITE A BUSINESS PLAN

The business plan tells a story about the purpose, the people, the product, the marketing and sales, and the financial resources required for the company. It is a management tool for starting and running a business. It can be broken into key parts:

1.) Executive Summary

2.) Company Overview

3.) Business Environment

4.) Company Description and Strategy

5.) Action Plan

6.) Financial Review

by Alan Goldman and Elin Schran 10/27/98

Getting started
First, to help you get focused, write out a list of facts about the company you plan to start. What do you visualize? Try to do the following things as you go: (taken from Business Plans for Dummies, p.13)

*Look closely at your industry
*Get to know your customers
*Check out your competitors
*List all your company's resources
*Note what makes your company unique
*List your company's advantages
*Figure out your basic financial condition
*Put together a financial forecast and a budget

Using these questions as a jumping off point, you can start to get a clearer picture of your business on paper.

Now for the actual Business Plan:

1.) Executive Summary
This is a one to two page positive statement highlighting the strongest aspects of the business plan. It is basically a summary of what is about to be read, and it argues for the success of the plan. This part of the plan has to grab the reader's attention to ensure that s/he looks at the rest of the plan. (Note that in the attached example*, the summary claims an 80% jump in profits for the first year-- that's a great attention getter for any potential investor!)

* not attached. Ref Tiffany (1997)

2.) Company Overview
This part of the plan broadly covers all aspects of the company, including the mission, values, corporate goals and objectives, and vision statements:

* mission statement - should lay out clearly and concisely (100 words or less), the realistic goals and objectives of the company. A bad example would be for a restaurateur to say, "We will continually improve our service, food quality and preparation." This is unrealistic and will make potential investors leary. A better statement might say, "We will strive to become the premiere Pan-Asian restaurant in the Boston area in terms of service and quality of food." This statement identifies the market niche, and gives a more realistic goal.

values statement - tells what the corporate philosophy is and how the company sees itself in relation to the environment or community it's part of. (See attached example values based on respect for the land, the people they work with, and the customers.)

*corporate goals and objectives - a statement of the goals which must be achieved to carry out the business mission. It will deal with issues relating to product, marketing, investment, manufacturing environment, and policies. It may also go into detail about how these goals will be supported- including time frames for hiring employees and closing certain business agreements (such as leases and marketing agreements). This is also the place to quantify various business results such as investments, profits, and returns on investments.

*vision statement - This is where you answer the question, "How do you see your company being perceived/received in the future by the industry and customers?"

3.) Business Environment

Clearly define the market environment, including market trends, segment growth, buyer behavior, and competition.

*market trends - be sure the trends are heading in a positive direction either because of growth, or level of decreasing taxes and restrictions. Be sure to back up your claims with factual data (see sample plan- "...annual U.S. wine consumption triples...")

*market segment growth - this is where you refine your discussion and give a description of a particular element of the industry. Here the business planner researches valid sources for supporting statistical information that will help precisely define the market. Good market segment analysis makes it possible to theorize about buyer behavior. In other words, this analysis helps the business planner to identify the person(s) most likely to buy the product. (see attached for excellent example a of customer profile that will enable the company to direct marketing efforts properly.) A study of the competition should be included here in order to determine market potential and accurate market planning. Such a study of the competition will hopefully yield insights about which markets are currently unattended or easy to penetrate with products.

*marketing and sales - As a result of the above analysis, a marketing and sales plan should be formulated. In this document include schedules such as- but not limited to- unit sales schedules, gross revenue from sales schedule, marketing programs, and projected results, costs, and a schedule of milestones tied to timeframes.

4.) Company Description and Strategy

This section should give an in depth description of the company and strategy. Include a list of personnel and their backgrounds. Additionally, state positions which will need to be filed and list what the desired qualifications for these positions might be. Also, include in an appendix names of the founders with short resume-type summaries of their expertise that will support the growth of the business.

*growth strategy- a narrative explaining how business will grow in terms of revenues, profits, production,and human resources. It should include information that details the execution of these plans.

*competitive advantage - tells why your product is better than the others. This is done by detailing the strengths and weaknesses of your product in comparison with the competition.

*operations - this section requires significant detail if your business is a manufacturing concern. If you are producing a product you need a well-engineered manufacturing plan which shows things like raw materials, labor, and capitol equipment. Once the product is made you have to plan for packaging and shipping, or warehousing. Also include a list of operations managers, who they are, what their qualifications are, and what their job descriptions are. You should also have a schedule of milestones for operations.

5.) Action Plan

This gives a five year plan of action. You should be specific about the steps to be taken in the first year, including what you will buy, whom you will train, what business seminars and shows you will attend, and how you will set up sales territories. In any business, plans often have to be adjusted to accomodate unexpected situations, but the first year plan is critical and is less apt to require change than year five. The plan should include information about finite activities to be undertaken by management in order to achieve financial and other goals.

6.) Financial Review

This is a critical part of the business plan as it offers the 'bottom line'. It is a series of projected balance sheets, income statements, and cash flows for the business, usually over a four or five year period.

*balance sheet - a financial statement that is like a snap shot of the financial condition of the company at a particular moment in time. It lists all assets and liabilities that the company has as accounts, in a chart of accounts.

*income statement - this, on the other hand, shows the change in accounts over a period of time. It is made up of accounts such as sales, cost of sales, expenses and profits, etc... At the end of any period of time any income calculated is credited to the assets and equity side of the balance sheet. (Any loss would be debited.)

Conclusion

While this document serves as a guide to writing a business plan, you must remember that different types of businesses require different planning resources. It is not our intent for this document to go in to depth about how to prepare (i.e., doing the market research and product planning) for writing the business plan. This is because setting up different businesses requires different expenditures of time and money. For example, costs for market research can range from several hundred dollars to several million. In order to correctly gauge the costs required for your plan's research, you must diligently examine the viability of your product in its domain. Since such examination varies widely from business to business, instruction for this phase is outside the scope of this project.

HELPFUL HINTS

(taken from The Small Business Troubleshooter)

1.) **Be sure to reflect reality in your plan.** It is easy to get carried away with dream visions that are impossible to implement. Also, investors want to see what is really going to happen with their money; a stable, slowly but steadily growing company is worth more to them than one that goes after fame and fortune without a solid base.

2.) **Be specific.** Explain how you intend to get from A to Z clearly and concisely. Show the investor that you have thought things through thoroughly and have considered carefully your options.

3.) **Be flexible.** Don't let small setbacks throw you off course. Stay creative, and look for new ways to reach your goal. Circumstances often change during the planning stage- go with the flow- or better yet, see if you can redirect it in the way that works best for you.

4.) **Recognize available resources.** Keep track of the names of those who might be of assistance to you in your development stages. Seek out the help you need.

RESOURCES

Books

Adams, Bob — Streetwise Small Business Start-up: your comprehensive guide to starting and managing a business, Adams Media, Holbrook, MA,1996

Fritz, Roger — The Small Business Troubleshooter, Career Press, Franklin Lakes, NJ, 1995

Malburg, Christopher — All-in-one Business Planner, Adams Media Corporation, Holbrook, MA, 1994

Tiffany, Paul — Business Plans for Dummies, IDG Books Worldwide, Inc., Foster City, CA, 1997

WWW Sources

Business Resource Center
http://www.morebusiness.com/templates-worksheets/bplans

Preparing a Business Plan - Canada BC Business Service Center
http://www.sb.gov.bc.ca/smallbus/workshop/busplan.html

Note: These internet resources are limited but provide good examples. Beware of most Internet Business Plan sites as they usually offer little information with hopes of selling services or software.

On Campus Resource

The University of Massachusetts School of Business (and other local Business Schools) provides courses that help with market research, finance and other business planning issues.

Preface: The production of a videofilm faces many challenges (and often more than other artistic forms of expression). One of the most important is finding low-cost technical resources. A few institutions in Boston are committed to helping independents by facilitating affordable access to production and location equipment. Furthermore, these institutions provide education in the domain of film and video. I want to introduce the apparently three most important organizations in this context.

Film/Video Resources in Boston

Briefing by Michael Ruf
12/22/2000
CCT698 – Practicum – Peter Taylor

1. Boston Film/Video Foundation

BMVF is a non-profit membership organization for independent film & video in Boston.

a) Address:

1126 Boylston Street (next T-Stop: Copley Place, Green Line)
Boston, MA 02215
phone 617-536-1540
fax 617-536-3576
e-mail info@bfvf.org
Homepage: www.bfvf.org

b) Membership

The basic membership costs anually §50.

c) Equipment

It offers eqipment in two ways:

(1) Low-cost in-house editing facilities: Digital non-linear and 16mm editing equipment at subsidized rates.
(2) Cooperative discount arrangements with local vendors. Equipment members (equipment membership costs annualy $100) have access to commercial vendors for location equipment at a savings of 20 – 40% (Note: For non-commercial projects).

BF/VF's members can furthermore apply for a sponsorship to fund their projects.

d) Education:

BF/VF offers workshops, courses, classes and labs in the field of film, video and digital media arts education. Topics are for example: film/video editing, documentary film/video making, film/video production, directing/acting, scriptwriting, cinematographer/lighting directing.

To illustrate the structure of these classes, I show the description of one of them:

„Extended Computer-Based Editing with Final Cut Pro

This class, designed for those students who need more time on the FCP, allows students to explore and practice what they have learned in class, at home, and at work. Also includes six additional hours of lab time. Prerequisites: Basic knowledge of Macintosh computer interface or film editing, or completion of Intro to Editing or Computer Based Editing with Final Cut Pro. Limit: 5 • 4 sections. Section A: Saturday, January 27, Sunday, January 28, 10 am - 4 pm, Mondays, January 22, 29 and Tuesdays, January 23, 30, 6-9pm. Section B: Monday, February 26 — Thursday, March 1, 6 - 9 pm, Saturday, March 3rd, and Sunday, March 4, 10 am - 4 pm Section C: Saturdays, March 10 & 17 and Sundays, March 11 & 18, 10am-4pm. Section D: Saturday, May 19, Sunday, May 20, 10 am - 4 pm, Monday, May 21 - Thursday, May 24, 6 - 9 pm Tuition: $660/ members, $710/nonmembers (NU 2)."

The catalogue can be directly downloaded: http://www.bfvf.org/education/catalog.pdf

e) Statement of a B.U. faculty

"BF/VF is the oldest, most respected local home for aspiringfilmmakers – it's the place you go when you're just starting out, the place to find peer support once you've become a 'somebody', and finally, it's the place to which you give back when your day is over. There is no more devoted, more passionately involved filmmaking center in our area..."

Mary Jane Doherty, Film Production Faculty, Boston University

2. Cambridge Community Television

„CCTV provides a public forum for Cambridge residents to participate in both local and global interactions using electronic media. CCTV offers video production workshops, access to equipment, and channel time on three community cable TV channels, plus access to computer hardware, software, training, and the Internet."

a) Address

675 Massachusetts Avenue (next T is Central Square, red line)

Cambridge, MA 02139

phone: 617-661-6900

fax: 617-661-6927 Fax

email: feedback@cctvcambridge.org

Homepage: www.cctvcambridge.org

b) Membership

There are different possibilities how much one has to pay:

Video	Computer	Combined	
$40	$40	$60	Access Member – Basic Rate
Discounted Options:			
$25	§25	$35	Discounted Access: Must volunteer in office for 4 hours.
$90	$90	&150	Family Membership
$15	$15	$15	Elder & Youth Members 65 and over, or 17 and under

c) Education

„CCTV offers a wide range of introductory, intermediate, and advanced courses in video production for television. Our intent in these workshops is to give you a solid background in basic video production and then set you loose to create your own programming for CCTV's channels."

„All introductory video courses are offered free of charge to members; intermediate and advanced courses typically cost between $15-$30 per course."

Courses are offered in three fielss: studio, remore, and edit.

For example, studio courses are devided in „beginning studio," „intermediate studio," and „advanced studio." The intermediate studio course, for instance, is described as follows:

„Intermediate Studio

Three 3-hour sessions, plus one shoot - $45; Prerequisites: Beginning Studio workshop In-depth look at the equipment and techniques used for Studio lighting, Studio audio, technical directing, using the Grass Valley switcher, and creating titles using the Laird Character Generator. For now, these topics will be treated in separate sessions, enabling those who have completed some to enroll in just those they haven't taken yet; contact John Donovan for details. Students who complete this course and participate in a subsequent Studio shoot will be certified as Studio Lighting and Audio Engineers, Technical Directors, and CG Operators."

The complete course schedule can be also be found in the internet: www.cctvcambridge.org/html/involved/train/vidschedule.html

3. Somerville Community Access Television

a) Address

90 Union Square
Somerville, MA 02143
phone: 617-628-8826
fax: 617-628-1811
email: info@access-scat.org
Homepage: www.access-scat.org

„The primary goal of Somerville Community Access Television (SCAT) is to facilitate the free expression of diverse ideas on Somerville's Channel 3 and other appropriate media in accordance with the First Amendment right of free speech.
SCAT does this by providing production facilities, technical assistance, and training to any Somerville, MA individual, group, organization interested in producing non-commercial programming.“

b) Membership

„Equipment Member“:
Individual fee: $40/ year
Senior (65+) or Youth (under 16): $20/ year
A member enjoy free use of the studio and production facilities

c) Equipment

SCAT equipment use is FREE to all members for all non-commercial projects. (See membership info for details). Non-members or members working on commercial projects may rent SCAT's equipment at the following rates:

Production

	Half day	$40
	Full day	$80
Post-Production		
Analog editing (version A)	1 hour	§15
(version B)	1 hour	$25

d) **Education**

The Basic Production classes are free to SCAT members.

The courses regularly offered are:

(1) Orientation, (2) Basic Studio Production, (3) Studio directing, (4) Basic Portable Production, (5) Intermediate Portable Production, (6) Advanced Portable Production.

The „Studio Directing“ course, for instance is described as follows:

„Prepare yourself to lead a crew and work with talent in a studio production. Learn the aspects of overseeing a show, and the commands to direct the crew. Understand the thinking behind the selection of shots. Master the techniques to minimize on-air mistakes and the tricks to fix them when they do happen. For the second class, you will direct your first shoot mentored one-on-one by the instructor.“