A FUNDRAISING GUIDE FOR YALE STUDENTS AND STUDENT GROUPS

Compiled and Edited by:
Zach Kaufman
President, Yale College Council
Saybrook College, Class of 2000

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Catherine Hinsdale SY'99, 1998-1999 President of Saybrook College Council, 1998 Chair of Saybrook College SAC

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Introduction and Purpose

This guidebook is for YOU!

All Yale students and student organizations would like more money to fund their activities and projects. With more money, student organizations could produce more first-rate events, invite more speakers, travel more, etc. The result of this would be an increase in the effectiveness and capabilities of students and individual student organizations, but more importantly, to enhance the overall student life at Yale. With more active and better prepared Yale student organizations, their contributions to the community will be bigger, clearer, and better recognized.

The question is how to raise this money. I have compiled and edited this guidebook to share with all of you my experiences and advice, and the experiences and advice of many others. Where appropriate, I have included descriptions of the official process for certain fundraising endeavors, especially those within Yale College.

Also, I suggest talking to the heads of organizations similar to yours at Yale and also at other universities and colleges. Many people have attempted to accomplish many of the same things we are and we can learn a lot from those other people and their experiences. Additionally, this might give you an opportunity to network with other student groups at Yale and/or across the country to talk about common issues or even work together to co-sponsor an event or project. (To contact student organizations at other universities or colleges, first, find that school's homepage. Then, locate their link to "student groups", or comparable topic. Scroll down to find a student group that may be similar to yours. Keep in mind that student groups with similar functions and purposes may be named very different things, so it may take some time to search for a particular group. For example, the campus-wide student government at Yale is called the Yale College Council, while its counterpart at Harvard is called the Undergraduate Assembly and the one at Stanford is called Associated Students.)

What is <u>A FUNDRAISING GUIDE FOR YALE STUDENTS AND STUDENT GROUPS?</u> The purpose of this guidebook is to try to help students and student organizations navigate through the complex bureaucracy of Yale funding. It is also a manual of tips and the official processes of funding coffers both within Yale and outside of Yale. One section in the handbook also discusses ways in which student groups can collaborate with each other to put on more first-rate events.

One thing to note: this guidebook is a work-in-progress. As I discover more relevant information, I will update the guidebook. Please give me feedback as to what you like and dislike and what other information would be useful. Thank you!

I hope that you find this helpful! Good luck in your endeavors!

Best wishes, Zach Kaufman November, 1998

SECTION I: YALE'S COFFERS THAT MAY FUND STUDENT ACTIVITIES

SECTION I SUB-SECTIONS:

- 1. Undergraduate Organization Funding Committee (UOFC)
- 2. Student Budget Advisory Committee (SBAC)
- 3. Council of Masters
- 4. Residential College Councils and College Student Activity Committees (SACs)
- 5. Sudler Fund
- 6. Dwight Hall
- 7. Cultural Centers
 - a. Asian American Student Association (AASA)
 - b. Afro-American Cultural Center (AACA)
 - c. Chicano Cultural Center
 - d. Puerto Rican House
- 8. Women's Center
- 9. Office of New Haven and State Affairs (ONHSA)
- 10. Aldermen (New Haven City Councilmen)
- 11. Graduate and Professional Student Senate (GPSS)

Section I, Subsection 1: Undergraduate Organization Funding Committee (UOFC) Submitted by: Adiya Dixon BR'00, UOFC Chair 1998-1999

The 5 W's of the U.O.F.C.

WHAT is the U.O.F.C.?

The U.O.F.C., or, Undergraduate Organization Funding Committee, is a standing committee responsible for allocation of Yale College funds to registered organizations.

WHO sits on the Committee?

A Chair and 8 selected members comprise the Committee. All 9 individuals are undergraduates. Along with the Chair of the committee, Dean Philip Greene interviews applicants and selects the members who are to serve a full year term. Interviews are held at the beginning of each term. The Chair is elected by the student body in the Yale College Council officer elections in the spring preceding the year of service.

WHY should I care?

Undergraduate Organization heads should be particularly interested in the U.O.F.C., as well as those who may be considering forming a new club or activity. Once registered* with Yale College, an organization is eligible to apply for partial funding to host parties, conferences, performances, activist campaigns, etc. This is a much preferred alternative to operating out-of-pocket.

WHERE do I get an application?

An official application can be obtained on-line at the homepage of the Yale College Office of Student Affairs. The URL is: http://www.yale.edu/ug-orgs/. The process is simple, but if you have any questions, please feel free to contact the Chair at: 436-0883, adiya.dixon@yale.edu.

WHEN is the application due?

With five deadlines per semester, undergraduate organizations have ample opportunity to apply. The deadlines for application will be posted in the Yale College Dean's Office, in Masters' Offices, in Yale Station, and on the on-line site of the UOFC (http://www.yale.edu/ugorgs/). If you have difficulty finding the information this way, please contact the Chair at the abovementioned number.

*The registration process is also an easy one. Registration is conducted on-line (http://www.yale.edu/ug-orgs/) by the Yale College Dean's office. Remember, only registered organizations in good standing are eligible to apply for U.O.F.C. funding.

BEST WISHES FOR A HAPPY AND HEALTHY SCHOOL YEAR!

Section I, Subsection 2: Student Budget Advisory Committee (SBAC) Submitted by: John Meeske, Associate Dean and Dean of Administrative Affairs, Chair of the Student Budgetary Advisory Committee

The Student Budget Advisory Committee (SBAC) makes recommendations to the dean of Yale College about funds to be allocated to a small group of centrally-funded student organizations. The committee is chaired by Dean John Meeske and includes other representatives of the Dean's Office (Dean Betty Trachtenberg, Dean Philip Greene, and Financial Analyst Anna Reynolds). Students on the committee include four representatives from the Yale College Council and one from each of four residential colleges on a rotating basis.

The organizations covered by SBAC include:

- The Afro-American Cultural Center
- The Asian-American Cultural Center
- The Chicano Cultural Center
- The Puerto Rican Cultural Center
- Yale University Bands
- Yale Symphony Orchestra
- Yale Dramatic Association
- Yale Debate Association
- Yale College Council (YCC)
- Undergraduate Organizations Funding Committee (UOFC)
- The Women's Center
- Residential College Student Activities Fund

Of course these are not the only student organizations that receive central funding and not all of the funds for these organizations come from the Yale College Dean's Office. For example, the entire expenses of the Glee Club are covered by endowments, and the symphony and band receive funds from small endowments as well as general appropriations. All three organizations receive income from concert fees and they earn money from fundraising. Each organization also has a musical director and a manager, and those salaries are paid with other funds.

The committee reviews requests for funding from these organizations and makes recommendations about the proper allocation of funds to each group. In most cases, the committee only deals with the allocation of budget increases among the various organizations, which typically average about 3% per year, though it is possible for the committee to recommend a reallocation of resources from one organization to another. The committee does not have the authority to recommend funding to organizations not traditionally included in its purview.

Submitted by: Catherine J. Marshall, Senior Administrative Assistant of the Office of the Council of Masters

The Council of Masters is composed of the Masters of the residential colleges, as well as the President, the Provost, the Dean of Yale College, the Dean of Academic Affairs, and the Dean of Student Affairs, ex-officiis. The council makes recommendations to the President upon all questions of policy touching the interests of the colleges. It serves as a "committee of control" in all matters affecting two or more colleges. Students may address concerns to this body by writing to its chair at 493 College Street in advance of its monthly meeting. The Chair is appointed for a term of one year by the corporation, on recommendation of the president. The chair for 1998-99 is Harry S. Stout, Jonathan Edwards Professor of American Christianity, American Studies, History, and Religious Studies.

Funding Information:

Each Master has at his or her disposal a Master's Fund that is restricted to the support of activities and events for students in that college. The Master's Fund may not be used to support individual students or to support events or activities involving students from more than one college. Examples of requests that cannot be funded from the Master's Fund are the support of a student's travel to attend a competition or the support of costs associated with an organization's conference.

On rare occasions, the Council of Masters has provided financial support to campus-wide student activities that are open to and involve large numbers of undergraduates. Recent examples are Spring Fling and club sports. Requests for financial support of such events should be made in writing and delivered to 493 College Street. The Council of Masters would review such requests at their regular meetings held during the academic year.

Contact the Council of Masters - Patricia Dallai, Executive Assistant: 493 College Street (2-1145).

Section I, Subsection 4: Residential College Councils (RCCs) and Residential College Student Activities Committees (SACs) Submitted by: Catherine Hinsdale SY'99, 1998-1999 President of Saybrook College Council, 1998 Chair of Saybrook College SAC

Each residential college elects a group of representatives to serve on the college council. This group is responsible for meeting the needs of the students in the college by planning social events, lobbying for physical improvements, and determining how to spend the college's budget allotment. At the beginning of each semester, the college council holds a budget meeting where elected representatives vote to fund various proposals. Typically, the president, vice president and treasurer of the council ask students to submit budget proposals within the first two weeks of the semester. The council leaders then prepare a list of all these proposals, providing the representatives with figures from the previous budget meeting. The proposals are then introduced at the budget meeting, followed by brief discussion and then voting. The representatives are generally receptive to viable, thoughtful and creative proposals. Most college councils also hold a "physical" budget meeting to determine structural improvements or purchases for the weight room, etc. Both types of budget meetings are well-publicized over emails and it is relatively easy for students to have their requests met by the council if they demonstrate the value of their proposals.

<u>Section I, Subsection 5: Sudler Fund</u> Submitted by: Gerald Thomas, Master of Davenport College

An overview of the Sudler Fund guidelines:

The Sudler Fund was established in 1986 to provide support for the creative and performing arts in Yale's residential colleges. The Fund, administered by the Committee on the Creative and Performing Arts of the Council of Masters, welcomes proposals from students for creative arts projects in the colleges.

Students must submit proposals in writing (and include the Sudler Funding Application Form) and proposals must be sponsored by the Master of the proposer's college. A primary proposer (e.g., producer, director, editor, lead actor) of the project must be a member of the college that sponsors the proposal. The proposal should briefly describe the project and explain how it will enhance the artistic life of the college and how members of the college will be involved.

Sudler funds may be used to support on-campus dramatic, musical, dance, video or film productions, and literary publications. Productions should be held in residential colleges if possible, and if not, must at least take place on campus.

The Sudler Fund may not be used to purchase equipment, to pay for projects proposed after they have taken place, to support visits by outside artists (except to give Master classes), to pay wages or honoraria, or to purchase food for props or recreation.

The Committee on the Creative and Performing Arts meets at the beginning of each term to review student proposals. Its decisions are conveyed in writing to the Masters who in turn inform their students.

The maximum grant for a play is \$1,000, for college publications, \$1,200 per year, for concerts, \$500, for video or film, \$1,000. The maximum for a dance is \$500 and for visual arts exhibits, \$500. The Administrative Assistants in each Master's office have more detailed guidelines for the use of the fund.

Section I, Subsection 6: Dwight Hall Submitted by: Celine Mizrahi JE'00 and Avni Gupta SY'00, 1998-99 Co-Chairs of Dwight Hall Executive Committee

Dwight Hall Funding

Dwight Hall at Yale, the umbrella organization for public service and social justice groups at Yale, is an independent non-profit organization which promotes community service and social justice by providing funding, resources and support for the over 70 student groups under its umbrella. Dwight Hall member groups, which are voted in by the Student Cabinet of Dwight Hall after an application process and provisional period, have access to resources such as: direct funding; transportation; office space and equipment (including photocopying, scanning, computer and internet access); training; publicity; and staff support. In order to receive funding or have access to the physical resources of the Hall, the student group must be a Dwight Hall member group. Dwight Hall also encourages all of its member groups to seek funding outside of the Hall as well, from sources such as the Undergraduate Organization Funding Committee (UOFC), Yale Office of New Haven and State Affairs, and outside grants. Any questions should be directed to the Dwight Hall Executive Committee Financial Coordinator, whose mailbox is located in the front lobby of Dwight Hall (on your right as you enter the Hall), or to Lisa Wojcik, the Dwight Hall Business Manager, at 432-0684. There are a few different potential sources of funding within the Hall, whose descriptions follow.

Dwight Hall Campus and Community Fund:

The Dwight Hall Campus and Community Fund designates a set amount of funding each semester to support the community service and social justice programs as well as projects of Dwight Hall member groups. All member groups in good standing are invited to apply. Applications are evaluated weekly at Executive Committee meetings, and funds are distributed on a rolling, first-come, first-served basis. Applicant groups are therefore encouraged to submit funding applications as early in the semester as possible. Member groups are eligible to apply for up to \$350 a semester . Associate and provisional groups are eligible to apply for funding to cover costs for one-day/special events at least two weeks prior to the event.

To apply for funds, your organization should:

- 1. Fill out a Resource Application available in the Dwight Hall office (also included in the Coordinator's Handbook). This application also requires that you submit a comprehensive, detailed budget for the semester.
- 2. Submit the Resource Application to the Financial Coordinator's mailbox (to the right as you enter Dwight Hall).
- 3. The Dwight Hall Executive Committee will review the application. If there are any questions, or if additional information is required, applicant groups may be asked to make a presentation to the Executive Committee, or to resubmit the application.

- 4. Attached budgets should include a section of cumulative income and cumulative expenditures. Expenses should be line-itemized (i.e. if you have food, postage costs, school supplies, they can be totaled up in a table form), but more specific receipts under each category should also be included. If you receive funding from more than one source, please include a table indicating these other sources.
- 5. The General Secretary/Business Manager will write your group a check for the approved amount if your group has a checking account. If your group does not have a checking account, your group can only receive funding with clearly documented receipts. If this is the case, you will need to fill out a yellow expense form located in the DH office. (For more details, see "Expense Forms.") For everyone's convenience, checking accounts are strongly encouraged.

Expense Forms: For reimbursement or to have a check written to a merchant for a specific cost, fill out a yellow "expense form" located in the Dwight Hall office. If you are being reimbursed, staple your receipt(s) to the form, and put it in the General Secretary's box. If you are looking for a merchant check, be sure to specify the exact amount.

Things to remember when applying for Dwight Hall C&C funds:

- Affiliated members are eligible for funding
- The Dwight Hall Campus and Community Fund will not sponsor events ex post facto. Please make sure that you plan ahead so you can get funded!
- If your group receives funding or uses Dwight Hall resources, you will be required to participate in the fun and exciting Dwight Hall phone-a-thon each semester.

Dwight Hall Social Justice Network Organizing Fund

As of 1998, the Social Justice Network (SJN) administers its own budget, separate from the Campus and Community Fund. As a result, SJN has developed an "Organizing Fund," which serves as the only funding source on campus that is tailored to the special needs and goals of the activist community. The SJN Organizing Fund is designed to support projects that may not otherwise obtain funding from other campus sources, provided that those projects meet the following specifications and requirements and are approved by the Organizing Fund Committee of SJN, a body that meets once a month to review applications. Applications may be picked up in the Dwight Hall Office. Any questions should be directed to Nicky Tuchinda (email: nicole.tuchinda@yale.edu).

- The SJN Organizing Fund exists to support and strengthen the efforts of Yale students who work for social justice, broadly defined. The organizing fund is for student projects that may not otherwise obtain funding from other sources on campus. Priority will be given to projects that involve collaboration between different student groups, projects that focus upon single actions/events within larger movements, and projects that are well thought out and will succeed.
- Requirements of every group that receives funding are:
- 1. Membership within the SJN, which requires representation at every SJN meeting.

- 2. Contribution to MESH, the alternative press publication of SJN, through at least one article.
- 3. Presence at recommended Leadership Institute Organizing Workshops.
- 4. Presentation of ideas for the project(s) to the general SJN group in order to receive input about improving the projects(s).
- No funding of events ex post facto. Please be advised of the monthly deadlines.

Yale Charities Drive:

Alpha Phi Omega, a service fraternity, sponsors several campus events to raise money that it distributes in April to student run service programs through an application process.

If you have any questions, please contact Lisa Wojcik at 432-0684.

Outside Sources/Grants:

A number of Dwight Hall organizations have received grants from local, state, and national foundations. A guide to grant-giving organizations, The Foundation Directory is available in the Dwight Hall office. For more information, contact Lisa Wojcik at 432-0684. Also, some Dwight Hall groups have successfully approached academic departments that might have an interest in planned events about co-sponsorship (and co-funding!).

Letters to department heads, meetings with professors, and inter-group collaboration often helps. For larger, more established groups, approaching alumni and parents may prove to be helpful. However, keep in mind that Dean Betty Trachtenberg has regulations on this type of fundraising: consult your copy of the <u>Undergraduate Regulations</u> for more guidance.

Other Sources Recommended by Dwight Hall:

- 1. Undergraduate Organization Funding Committee (UOFC)
- 2. Office of New Haven and State Affairs: The Yale Office of New Haven and State Affairs traditionally funds education-oriented community service efforts within New Haven. For more information, contact Mike Morand at 432-4082 (433 Temple St.).

Section I, Subsection 7a: Asian American Student Association (AASA) Submitted by: Shilpi Mehta MC'99, 1998-1999 Moderator of AASA

A Guide to Requesting Money From the Asian American Cultural Center

The Asian American Cultural Center (AACC) does not have an expansive budget, and often has difficulty funding its everyday expenses. However, it is very interested in furthering the projects and programs of as many of the events and organizations that focus on Asian American issues as they can in any given semester.

Currently, budget requests to the AACC are made to the Asian American Students Association (AASA), the umbrella organization of the 8 ethnic-specific Asian American organizations on campus. These 8 groups are given a small amount of that budget every semester, and AASA itself uses this budget for its own expenses. However, at the beginning of every semester, a good portion of the entire budget is set aside as a "Discretionary Fund." This is where money you request would come from. The source of this funding is the Yale College Dean's Office, which means that money cannot be requested for publications of any sort. Restrictions on what can and cannot be funded are similar to those that the UOFC follows.

Steps to Follow:

- 1. Make sure you have exhausted every other method of getting funding. If you have not, you are unlikely to get money until you have shown you have done so.
- 2. Come up with a detailed budget (see example). AASA Discretionary funds are given out only to those who need the money; that means you cannot use the fund as a cushion, just in case you don't have enough; the money should be put to a specific use. The more substantial the use, the better; requesting money for food is not as persuasive a cause as requesting money for a speaker on Asian American issues.
- 3. Contact the Moderator of the Asian American Students Association. The Moderator for Fall of 1998 is Andrew Song, BK '00 (andrew.song@yale.edu). Let him know well in advance of your event that you would like to make a budget request. He will tell you when you will be put on the agenda (normally at a Monday night meeting at 7PM at the AACC). SHOW UP ON THIS DAY!!!!
- 4. Write up a cover letter to your budget explaining why you are requesting money and how what you are doing would benefit the Asian American community at Yale. If possible email your letter and request to the AASA Moderator a week or so in advance; that way, the executive committee will have a chance to look over it.
- 5. Go to the meeting and present your case. Take 10 copies of your budget and the letter. If you have flyers or posters bring those as well. Usually there will be some discussion among the 8 presidents on the Executive Committee. They will look at the amount of money you have

requested and they will most likely ask you many questions. Be prepared to answer all questions about the budget-- know your budget inside and out.

- 6. One of the committee members will then make a motion to give you a certain amount of money (not always as much as you have requested) and someone will second that motion, and then the eight executive committee members will vote. However, if you have not given them enough information they can table your request until the following meeting.
- 7. At this point you may or may not have received all of the money you requested. Make sure you ask the committee members to help you in other ways, such as getting people to help you put up posters.
- 8. Although AASA recommendations about the discretionary budget are normally accepted, all final decisions must first be approved by the Yale College Dean's Office before you actually receive the money. Dean Hsu, the dean currently in charge of the AACC, will often call the requester in to find out exactly how the money will be spent. The decision is only final after the Dean's approval. Be sure to have made your request as far in advance as possible to allow time for this approval.

That is basically the whole procedure; however, there are few other avenues you may want to try. If you think you have enough money to put on an event for fifty people, you may ask for an insurance policy of a certain amount (e.g. \$100) from AASA, which basically means you do not get the money unless for some reason you fall short. Also, it is possible that the Dean who runs the cultural center may be able to give you money from her discretionary fund. Make sure you go to her and ask her as well, for she is always interested in knowing about your events!

The following is a sample Budget Request. It should give you the general idea, although it is missing the breakdown of where the expenses come from.

PRISM Budget Request

PRISM, a support and action group for lesbian, gay, bisexual, transgendered, and questioning students of color at Yale College is sponsoring a conference on February 20 and 21,1998. As part of the conference, we would like to invite to invite a speaker from the Asian & Pacific Islander Coalition on HIV/AIDS (APICHA), a non-profit AIDS education, prevention, and advocacy organization based in New York City that caters specifically to the needs of Asian and Pacific Islander Americans. We would also like to invite two graduate students from Columbia and Brown to speak on gay & lesbian issues in Asian American studies. PRISM is asking AASA to help make the attendance of these three speakers possible by providing funds for transportation and one meal for the speakers.

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2 round trips from NYC @ $30 = $60
1 round trip from Providence, RI = $50
TOTAL REQUEST = $110
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Total Estimated Expenses for Conference	\$3000
Funding Sources	
LGTB Co-OP	\$500
Registration fees, entrance fees to dance and performance	\$800
UOFC	\$500
Yale departments (women's studies, af-am)	\$260
Fund for Lesbian and Gay Studies	\$500
United Colors of Epidemiology and Public Health	\$200
Yale ethnic groups (e.g. AASA, MEChA, DB):	\$240

We are still waiting to hear from MEChA and DB, but we expect around \$100 from each of them.

We hope AASA can help to make this unique conference possible, and at the same time raise awareness at Yale about current issues affecting Asian American communities by sponsoring the three speakers.

For more information, please contact Bob Jones @ 888-8888 or Howard Yee @436-0000.

Section I, Subsection 7b: Afro-American Cultural Center (AACC) Submitted by: Tauheedah Rashid SM'99, Staff Coordinator at the Afro-American Cultural Center

Guidelines for Funding from the Afro-American Cultural Center (AACC)

In order to receive funding from the AACC the student organization must be currently registered with the Yale College Dean's Office and a resident group of the AACC. Once these two procedures have been completed, the student group will be allowed to submit a funding application to the AACC Junior Board for review. For further questions on how to become a resident group, please call the Afro-American Cultural Center at 432-4131.

Section I, Subsection 7c: Chicano Cultural Center Submitted by: Felicia Escobar SY'99, Chairperson of Movimiento Estudiantil Chicano de Aztlan (MEChA)

History

During the early 1970s, Yale College experienced a significant growth in the number of Chicano students on campus. As a result, these students formed an organization dedicated to social, political, and cultural issues impacted the Mexican American community on Yale campus, as well as, in the nation. The students first organized under the name Los Hermanos, and later as Movimiento Estudiantil Chicano de Aztlan (MEChA). MEChA students challenged administrators and demanded the creation of services that satisfied the needs of the Chicano undergraduate community. After countless hours of debate and deliberation, the Chicano Cultural Center was founded in the basement of Hammon Hall. Since then, the Cultural Center has moved a number of times; it is presently located at 295 Crown Street between York and High Streets.

With the years passing, the Chicano community has become more vibrant and diverse. Accordingly the Cultural Center has grown in its provision of services and goals. The goals of the Chicano Cultural Center are the two-fold:

- To create a location for the Chicano community (i.e. movement) to flourish within the Ivy-covered walls of Yale and New Haven; and
- To encourage activities that promote the examination of social, political and cultural aspects of the Chicano community; and

The Chicano Cultural Center has been a key contributor to numerous campus-wide events, from the annual Latino Heritage Month Closing Banquet to the visit of United Farm Workers' President Arturo Rodriquez. The Center offers funds, but also space for student-groups to meet weekly. There is Cultural Center Staff available daily to assist groups and individuals utilizing the kitchen, library, computer and television rooms. The Center is under the direction of the Assistant Dean of Student Affairs, Rick Chavolla, whose office is located in the Yale College Dean's Office.

How to Apply for Funds

The Chicano Cultural Center seeks to fund any student-generated activity or student-run organization that promotes Chicano social, political, or cultural issues. Students or student groups who wish to apply for funds should:

- Contact the Director of the Chicano Cultural Center, Rick Chavolla, at the Yale College Dean's Office:
- Formulate a budget for the event or group; and
- Meet with Director Chavolla to discuss a feasible amount with which to fund your project.

Groups	s interested i	n applying i	for funds or	using s	pace in th	e Cultural	Center	should	contact
Dean R	Rick Chavoll	a at (203) 4	32-2906.						

Submitted by: Edgar Letriz-Nunez, Assistant Dean of Yale College and Director of the Puerto Rican Cultural Center

LA CASA CULTURAL JULIA DE BURGOS, Yale's Puerto Rican Cultural Center, is located at 301 Crown Street. More detailed information on the services and resources available at the Center can be found in the 1998-1999 edition of <u>The Yale</u>. La Casa Cultural Julia de Burgos does not accept requests for funding from students or student organizations; however, the director will consider co-sponsoring or funding activities at the Cultural Center which are consistent with the purpose and mission of the Puerto Rican Cultural Center as defined by the director and the Yale College Dean's Office. For more information, contact Dean Edgar Letriz-Nunez, Yale College Dean's Office, 432-2906.

THE PUERTO RICAN STUDENT ACTIVITIES BUDGET: Each year, Yale College allocates money to the director of La Casa Cultural Julia de Burgos, an Assistant Dean of Yale College, to provide financial support to students for programs and activities which enhance or promote the understanding of Puerto Rican culture in the larger Yale College community.

Request for Funding: Funding is available to any Yale College student(s) or student organization whose proposed activity clearly enhances or promotes the understanding of Puerto Rican culture in the larger Yale College community . There are no set application deadlines for requests for funding; however, formal proposals for funding must be submitted to the director no later than two weeks prior to the date of a proposed event where attendance is expected to be less than fifty persons or three months in advance for large-scale events open to the entire Yale College community.

Funding Proposals: Requests for funding must be accompanied by a one-page, type-written proposal to include the title of the event, the nature of the event, the names of the event sponsors (including telephone numbers and Yale Station address), the date of the event, expected attendance, duration of event, as well as information on other sources of funding being requested or secured. Requests for funding WILL NOT BE CONSIDERED if not accompanied by a carefully prepared budget sheet showing expected costs and anticipated income. Funding will be awarded based on a review of the organization's current budget (if funded by the UOFC), the strength of the proposal, the budget sheet, and the level of contribution such an event will make to the enhancement and understanding of Puerto Rican culture.

For more information, contact Dean Edgar Letriz-Nunez, Yale College Dean's Office, 432-2906.

Section I, Subsection 8: Women's Center Submitted by: Vanessa Agard-Jones CC'00, 1997-98 Co-Coordinator of the Women's Center

The Women's Center at Yale exists as a resource for women and feminists (not necessarily converging identifiers, but often they are) in the Yale and New Haven communities. The Center acts as both an umbrella organization and physical space for numerous residence groups (including PRISM: Queer People of Color at Yale, Sexual Assault Support Group, and WYSE: Women and Youth in Support of Each other). The Center, as a separate entity, sponsors speakers, is very much involved in campus activism, and has begun to function as a performing and visual arts space. Although the Center is direly underfunded, the coordinating board is always eager to hear ideas from fellow students about events that the center might be able to support. Everything that it sponsors is a collaborative effort, so the first step in looking for funding from the Center is to come to one of the coordinator board meetings (which are generally open to anyone who is interested) and pitch the idea, giving a time frame and a sense of how much the event/ project might cost.

The coordinators for Fall 1998 are: Tassi McKay TD'00, Rachel Deutsch ES'00, Farrah Karapetian DC'00, Eunice Cho CC'00, Sara Nichols DC'99, and Debbie Schmuhl TD'00.

Section I, Subsection 9: Office of New Haven and State Affairs (OHNSA) Submitted by: Michael Morand, Assistant Vice President of the Office of New Haven and State Affairs

The Office of New Haven and State Affairs provides funding for undergraduate, graduate, and professional student groups that work in partnership with the City and citizens of New Haven to promote economic development, human development, and neighborhood revitalization.

Priority for funding is given to projects that are sustainable, have a demonstrated impact with the community, and that promote collaboration among organizations at Yale and in the community in order to reduce duplication of services.

While there is no set minimum or maximum for funding, the typical grant in recent years has been for between \$100 and \$1,000. Groups interested in funding should apply in writing to Michael Morand, Assistant Vice President, Office of New Haven and State Affairs, 433 Temple Street, and include a letter that outlines the history of the organization, its partners in the community, the neighborhood(s) where it works, the number of people impacted, a description of the proposed project and how its success will be assessed, a project budget, and the overall budget for the organization for the year. Groups should also include other information, such as annual reports or press clippings, that describe their work.

Groups are encouraged to contact the Office of New Haven and State Affairs prior to formal application to discuss their project and the priorities of the office.

<u>Section I, Subsection 10: Aldermen (New Haven City Councilmen)</u> Submitted by: Julio Gonzalez CC'99, New Haven Ward One Alderperson

What is an Alderperson?

The City of New Haven's Charter designates Alderpeople with advocating the interests of their ward. There are thirty wards in the Elm City, and Yale occupies most of Ward One and spills over into Wards Two, Seven, and Twenty - two. Berkeley, Branford, Calhoun, Jonathan Edwards, Saybrook, Silliman, Trumbull, and Timothy Dwight are in Ward One. Julio Gonzalez is the alder for Ward One. Davenport and Pierson are in Ward Seven. Esther Armmand is the alder for Ward Seven. Morse and Ezra Stiles are in Ward Twenty Two. Grace Gibbs is presently the alder for Ward Twenty Two. Finally much of the Dwight-Edgewood off-campus housing can be found in Ward Two. Jelani Lawson is the current alder of Ward Two. Although three alderpeople share Yale's dorms, the Ward One alder has historically been the most actively involved in supporting student issues. Students should feel free to seek his / her support on any project involving city funding. The Board of Aldermen meets at least once a month. They deliberate on most issues affecting the everyday services provided by city government, as well as the long term vision for the city's improvement.

Something to consider

Before calling your elected representative you should think about some of the differences between funding that is available in the city, and funds commonly utilized by Yale students. First, city monies require that the organization be a 501(c)3 (a registered non-profit.) If your organization does not have said status, you should probably find a non-profit agency which is willing to be your fiduciary agent. If your organization is currently not a non-profit, it is unlikely that your organization could attain it quickly enough to take advantage of city funds. Second, most city funds are not for one-shot projects, but are intended to fund year round programs that serve the community. Many funding streams are intended for serious attempts at providing social services or community building, and thus, seek to fund substantial outcomes. Finally, City funds can be very political. In other words, having the power to influence and provide useful information to key decision makers is a must. Some niches are not as blatantly politicized as others are. For example, the city's allotment of federal funding through the Community Development Block Grants program is more politicized than an application to the Community Foundation (not to imply that the latter is free of the burden). Potential applicants should be aware of this dynamic since it makes the process much more time consuming and straining.

Examples of funding

There are a countless number of funding streams both (a) within government and (b) community agencies. Depending on the strength of the application, these coffers might be able to provide funding for student projects. The viability of applying for funding depends on the applicant's mission and timetable.

Let us compare a few types of popular sources of city funding to make key distinctions between funds clear.

Community Development Block Grants (CDBG): These funds are intended to fund substantial social service or community building projects either through the creation of actual physical structures (hardware) or the teaching of a skill (software). The application process is lengthy and very political, requiring support from community agencies and aldermanic approval. Projects that have been started by students that have been considered or have received funding include LEAP, Jumpstart, and Urban Solutions.

Community Foundation: The Foundation has many different funds targeting a diverse set of issues. Applications are rather lengthy and involved. While the process is certainly not "political," being able to communicate effectively with decision makers is crucial to a successful application. Alderpeople have no direct influence over an application, but can help be valuable advisers.

Cultural Affairs Commission's Neighborhood Festival Grants: Applying to these grants is very easy and does not consume much time. These grants come out of city hall and are somewhat political. A brief application is considered by the Cultural Affairs Commission, and if chosen, a small amount of money (between \$250 and \$500) is given to the project. The grants have a very specific mission - to promote neighborhood identity and "togetherness" through social activities. Even though Alderpeople have no direct influence over decision making, they can have a profound impact on an application's chances by advocating for it.

Alderpeople do not have individual coffers from which they can provide funds at their own discretion. However, as the above examples illustrate, they have significant power in controlling and overseeing some of the City's funds. Alderpeople serve as communication links between the administration and citizens. Alderpeople can also act as resources to citizens by providing non-governmental community contacts that might be of invaluable assistance. As such, an alderpeople can't guarantee you money, but they can put someone in the right places at the right time.

For example, alderpeople can usually refer you to the main players within a funding organization. Often, if an alderperson supports a project, he or she can set up meetings and discussions of the project. Other times, they can write letters of support for a program. Some alders will also publicly vouch for a program. Additionally, almost all alders sit on boards of agencies, foundations, or corporations that have access to some type of funding.

A step by step process

Anyone interested in getting funding from City Sources should take the following steps:

First - mission and time constraints - get a clear idea of what your project entails and how much time you can put into seeking out funds.

Second - assessment - contact the alderperson and explain your project and time commitment. Your Alderperson will assess to the best of his or her ability the viability of your project as an applicant to City and \ or community funding pools.

Third - contact - If your project seems viable, your alder will then give you information about specific funds you might be interested in utilizing, the process by which those funds are governed, and who should be contacted. Your alder then becomes an advocate for your project, keeping you informed of developments, and making sure your project is treated fairly, and fully considered during deliberations.

Regardless of what stage of a project you are in, contact your elected officials. They are there to serve YOU!

Section I, Subsection 11: Graduate and Professional Student Senate Submitted by: Robert Covington, 1998-99 President of the Graduate and Professional Student Senate

The Graduate and Professional Schools at Yale offer a unique resource to the undergraduate colleges. Through the Graduate and Professional Student Senate (GPSS) the undergraduates can access potential funding and develop links with graduate organizations. The primary source of funding for undergraduate activities is the GPSS, but this funding is dependent on graduate involvement in the event. For example, the GPSS helped sponsor the undergraduate Spring Fling last year and, in return, the graduate and professional students were invited to take part. Undergraduate students should look to the Senate to help build links with Graduate and Professional Student Organizations. For example, the School of Medicine has a program, AIDS Project New Haven, that provides support to individuals and families infected with AIDS. This type of organization can link up with Dwight Hall to allow for undergraduate involvement. There are thousands of opportunities just like this one in which undergraduates and graduates can benefit from the others' resources, knowledge, and in some cases financial support. If you are interested in building links with or finding out about graduate student organizations contact:

Robert Covington
President of the Graduate and Professional Student Senate email: covingrc@biomed.med.yale.edu

Some areas that organizations can probably find graduate counterparts or graduate support

- 1) Religious Organizations
- 2) Philanthropic Organizations
- 3) Academic Organizations
- 4) Social Organizations (actually we need your help here)
- 5) Political Organizations

In some cases we allow the graduate student center at Yale to be used for undergraduate activities (if interested call GPSCY 203-432-2638)

SECTION II: HOW TO ORGANIZE AND FUNDRAISE FOR AN EVENT

Submitted by: Tyson Belanger ES'98, 1996-97 President, Yale College Council

"You can count on others. But it's better to use your own fingers and toes."
-wisdom from a Bazooka Bubble Gum Comic

The effectiveness of every undergraduate organization is in some way tied to its ability to raise funds. As this guidebook suggests, there are many ways for an organization to do so. The subject of this section is independent fund raising.

"What is independent fund raising?"

In an independent fund raising effort, a single organization has final authority over and responsibility for all revenues and costs. This sponsor organization is also held accountable if its fundraising effort violates any undergraduate regulations. Independent fundraising efforts are often the principal source of funding for undergraduate organizations, and, as such, it is of critical importance that they are successful. The purpose of this section is to provide general advice about how undergraduate organizations may conduct effective independent fundraising efforts. For the sake of clarity, this section divides its contents by posing several simple questions.

"Why fundraise independently?"

Independent fund raising often provides organizations with the bulk of their funding and is usually the most dependable kind of fund raising. In its other sections, this guidebook discusses several ways in which an organization can capitalize on resources provided by the administration, seek funding outside of Yale, and coordinate its actions with other student groups. These means of fund raising are important, but they often demand a great deal of time and patience. To avoid these frustrations, many organizations turn their focus to independent activities. Sometimes, by demonstrating an organization's abilities and seriousness, independent efforts actually improve that organization's chances of receiving other outside assistance. Even an organization whose funding is already provided for (whether by the administration or by their alumni) may wish to employ the strategies of independent fundraising. For such an organization, independent fund raising techniques may supplement their present funding resources and enable them to sponsor events of a scale otherwise impossible.

<u>Example</u>: The Yale College Council is provided a yearly operating budget by the administration's Student Budget Advisory Committee. This budget is significant. But it is not enough to cover the costs of its campus wide events. The YCC, therefore, makes use of independent fund raising strategies when it sponsors events (charging admission to the Winter Ball). In the eyes of the administration and other student groups, these events then become tests of the YCC's seriousness, competence and responsibility. Depending on the YCC's successes or failures in sponsoring its independent fund raising campaigns, the administration and other student groups are then more (or less) likely to work with the YCC on future projects.

"Should the event be held?"

The importance of this question is not always obvious. But there are serious differences between undergraduate organizations and not every fund raising technique is appropriate to every group. An organization should evaluate its strengths and weaknesses before deciding upon a fund raiser. An organization's reputation, institutional memory, participation, financial resources and traditions should each be accounted for.

Example: The YCC has a fairly strong reputation for sponsoring an enjoyable Winter Ball. The YCC has been sponsoring Winter Balls for several years now, and many of its current members remember how it was organized last year. These veterans and those new to the council will likely volunteer to invest their time during January and see this year's Winter Ball become another success. In terms of financial resources, the YCC has enough to cover the event's initial costs and is likely to raise enough with ticket sales to cover the rest. There is also a tradition within the YCC of hosting the only campus wide, semi-formal dance. Each of these characteristics factor into the decision making process of the YCC when it asks whether or not it should host a Winter Ball this year.

"At whom is the fund raiser targeted?"

This question is one concerning audience. Usually, when fundraising, an organization's final objective is to obtain the money of some group of people. In exchange for the group's money, an organization provides the group a service related to that group's interests. By defining an audience in terms of its interests, your organization may discover useful principles that will answer many other questions concerning your fund raising. This is not to say that your organization should completely ignore the interests of those outside the fund raising effort's direct audience. To the contrary, most successful fund raising efforts are planned with inclusivity in mind.

Example: Many ethnic associations sponsor dinners which feature their culture's style of food. These dinners are meant for several "audiences" within the student body. The first and perhaps most important is their own membership. The effort of hosting a dinner pulls members together while it provides the members with an opportunity to celebrate the culture of their organization. The dinners are also useful because they attract new members to the organization. Therefore, the second audience is the body of potential recruits within the student body. A third audience for a cultural dinner is the student body in general. Activities such as dinners may provide an organization with name recognition and increase cultural awareness among those who might not otherwise know of the group. Each of these audiences have different interests which can be served by a well-organized dinner. And all of this can occur while raising funds for the organization.

"What is to be done?"

Methods of fund raising can be usually categorized in two ways; they are either activities or sales campaigns. It is important to note, however, that these are not mutually exclusive. An organization may sell products at an activity, or it may host an activity to promote interest in a product being sold. An activity may even be combined with other activities. Likewise, different products can be sold at the same table. Common fund raising activities and sales campaigns

include dances, study breaks, contests, field trip, mixers, talent attractions, carnival rides, concerts, clothing sales, raffle tickets, memorabilia sales and auctions.

Example: An excellent example of a fund raising effort which involves several activities and sales campaigns is the Casino Night sponsored by the Ezra Stiles and Morse Student Activities Committees (SACs). In the past, Casino Nights have been preceded by sales campaigns peddling specialty shot glasses, discounted tickets for Casino Night tickets, and t-shirts. These campaigns, when they are successful, both publicize the evening and raise extra cash. Those who pay the admittance fee for Casino Night itself are treated to fortune tellers, dance floors, pretend gambling, a bar and an auction to top the night off.

"Where will the activity be held?"

The "What?" often determines the "Where?". Obviously, some activities must be indoors and others must be outdoors. But some can be either or even both. An organization may even wish to consider hosting the activity off Yale campus (New Haven Green, an amusement park or private property.) Wherever it is held, always be certain that the location satisfies the activity's needs and that the host organization reserves the space well in advance. Reservations are important for almost every space available on and off campus. Remember to always have a well publicized contingency plan in the event of inclement weather. To reserve Old Campus, see Dean Trachtenberg, and to reserve Cross Campus or Beinecke Plaza, see Nina Glickson. Example: In the Fall of 1996, the President's office and the Yale College Council teamed up to sponsor a Halloween party. Most of the attractions (including caricature artists, games, a fortune teller, free food, a magician, a belly dancer and a costume contest) were inside Commons. Special reservations and costs were involved in securing Commons for the event, and the sponsors worked closely with YUDH to pull off the event. The YCC reserved Beinecke Plaza by seeking the permission of Nina Glickson of the President's office. On the Plaza, the Anti-Gravity Society juggled fire. Obviously, this attraction could not have happened inside and nor could Commons have accommodated the total number of people who stopped to attended the party. Thus, the outdoor fire show nicely complemented the indoor events and helped make the party a great success.

"When will the fund raiser take place?"

The answer to this question is interdependent with the previous questions of "What?" and "Where?". Activities that are held outside are particularly sensitive to weather conditions. Other activities, while they may not be as threatened by foul weather, are still sensitive to the rhythms of the calendar. Serious problems may arise if an event is scheduled without first considering the dates of religious holidays, academic requirements, the resources available to your organization, and, perhaps most importantly, the plans of other organizations.

Example: Several years ago, the Student Activities Committees of the Residential Colleges would meet once a month and plan when they would be sponsoring their events. While doing so, they were made sure that their small activities were not overpowered by big activities of the other SACs (including The Safety Dance, The Inferno, the winter formals and Casino Night). They were also able to coordinate their activities for important times like Harvard/Yale Weekend and Spring Fling Weekend. This cooperative scheduling ensured that each SAC got the biggest bang for the bucks they invested in their events.

"To whom can an organization turn for advice?"

A number of administrators and fellow students are experienced in preparing a variety of fund raising activities. As resources, they should be valued as much as an organization's initial financial resources. Indeed, in many cases, undergraduate regulations require organizations to consult with administrators. Be bold. Speak with them early in your planning. It may be well worth it. An organization can save itself from a number of frustrations that it may otherwise be able to avoid.

Example: The YCC, like many other campus organizations, has no official adult advisor but neither is it entirely on it own. In the past, when the YCC has decided to sponsor an event, its members have sought the advice of administrators (including Dean of Student Affairs Betty Trachtenberg, Assistant Dean of Yale College Philip Greene, Assistant to the President Nina Glickson, Yale's legal advisers, Senior Administrative Assistant Elisabeth-Jane Schiller, and Assistant Director for Yale College Dining Services Eric Uscinski) and the heads of several student groups (including the Yale Daily News, the Yale Herald, the Student Labor Action Coalition and the Yale Student Environmental Coalition). The YCC also relies on the advice provided by veteran members of the YCC and former members. To retain these human resources, the YCC has created an honorary non-voting position (Senior Associate) for veteran members who wish to continue their participation in the YCC without carrying the full burden of being representatives.

"Who needs to be hired?"

Almost every fund raising activity or sales campaign involves several contracted personnel. Sometimes, there are university regulations which require that personnel be hired. Such personnel may include police, entertainers, managers of carnival ride companies, manufacturers, copy stores, staging and lighting professionals, janitors, electricians, Physical Plant workers and dining hall managers. Depending on whom an organization wishes to work with, it is usually good for the organization to contact the personnel at least two months ahead of time. This guarantees that the personnel will be available for the date of the event and also provides organizations enough time to compare their prices with other personnel. To be sure that their contracted personnel are qualified, organizations commonly ask their personnel for references before they are hired. Once an organization is confident with its choice of personnel, it is critically important for the organization to provide their personnel with time lines of the event, directions (both for traveling to the event's location and for parking), maps of the event's layout and the location's electrical specifications. The organization should also be sure to discuss and receive a written contract in advance of the event. This document should then be available at the event itself to help settle disagreements.

Example: A typical Yale dance requires the sponsoring organization to hire at least three people. A student dining hall manager is needed to open the dining hall, provide instructions about how it is to be protected during the dance and be responsible for locking the dining hall doors at the end of the night. Every college has at least one student dining hall manager and they can be contacted through YUDH. A DJ, of course, is the most important person in making a dance successful. DJs may be found with a phone book, by talking to other organizations and even at dances held by other organizations in the weeks before your dance. The third group of people

that must be hired for an on-campus dance is Yale policemen (the exact number of policemen depends on what the Dean's office requires.) With each of these personnel, it is important to reserve their services at least a month in advance.

"How will the audience know about the fund raising effort?"

A strong publicity campaign is essential for a successful fund raising effort. It can be worthwhile for an organization to invest as much as 20% of its anticipated costs on advertising. The goal of any publicity campaign is to inform and excite the audience most likely to have an interest in the campaign's event. There are numerous ways of doing this. Common methods include the use of posters, table tents, chalking, newspaper advertising, calendars, leaflets, banners, newspaper preview articles, publicity stunts, networks with other organizations and dining hall announcements. It is important to note, however, that there may be university regulations restricting where and what is permitted as publicity. For more information about publicity regulations, consult the publicity guide provided in the UOFC registration packet or contact the Yale College Dean's Office. (You may view the UOFC packet online at http://www.yale.edu/ugorgs.)

Example: The Freshman Class Council sponsors a Screw Your Roommate Dance every October. The target audience for the event is the Freshman Class. To reach out to their fellow students, the Freshman Class Council uses of a number of publicity tactics and divides the publicity responsibilities amongst its members. Posters are placed at the entrance of each freshman entryway and on every public kiosk (both indoors and outdoors). Leaflets are slipped under the doors of every freshman suite. One table tent is placed on every dining hall table in Yale (about 40 per college and 70 for Commons). Chalk parties are held where each member uses a stick of chalk to write advertisements on the sidewalks and other horizontal surfaces (where the rain can wash the message away). E-mail messages are sent between friends with explanations of the traditions for Screw Your Roommate Dances. Finally, a banner is usually hung on the gate entering Old Campus near the Post Office. Each of these techniques comply with undergraduate regulations and succeed in attracting over a thousand freshmen and their guests each year.

"For how much money?"

Just as publicity can make or break an event or a sales campaign, so can the prices your organization decides upon. Unfortunately, the magic number for a price is not always an obvious one. An organization must weigh every factor in its planning to find the right price. The most important ones are considerations concerning cost, profit, audience, the nature of the event, its time and its place. Speaking broadly, formal events, evening events and indoor events tend to be priced higher than their alternatives. Two especially handy standards for pricing an event are its price last year (if applicable) and the price of comparable events. An organization may also want to provide the option for students to bursar bill purchases from the host organization. Consult the Yale College Dean's Office for more information about using the bursar billing system. Example: Many publications have to work hard to cover the costs of printing. Their only funding is whatever they can raise by selling advertising space to local businesses.

Unfortunately, even with competitive prices, publications may still fail to sell enough space. An alternative fund raising technique is to charge students for copies of the publication (sometimes \$1.00 per copy). This, however, rarely works well because almost every competing publication

on campus is free. The audience for the publication might not buy it for any price. Not every fund raising campaign succeeds. Organizations must know when to cut their losses and direct their energies to other funding strategies.

This section has endeavored to pose and answer several of the more general questions that must be answered while planning an event. Obviously, it is impossible for any pamphlet to completely outline the details of every possible fund raising effort. This section is, therefore, necessarily incomplete. In the end, organizations must proactively seek out more specific guidance and, ultimately, count on themselves to raise their own funds.

SECTION III: CO-SPONSORSHIPS BETWEEN STUDENT GROUPS

Submitted by: Kimberly Taylor TC'99, 1997-98 President, Yale College Council

A powerful and effective way for a Yale undergraduate organization to raise money for its organization is through cooperation and co-sponsorship with other Yale organizations. Working with other Yale groups, an organization decreases its financial risks by sharing its overall costs; in some cases, co-sponsorship allows the opportunity to purchase or requisition items or services in bulk, thereby allowing the organizations to secure a better service or "deal" for the students and a greater margin of profit for themselves. The partnership has the additional benefits of increasing the word-of-mouth effect, student labor and idea pool. Further, cosponsoring events can be an incentive for future joint or cooperative projects between organizations and thus creates a more cohesive, dynamic and involved campus.

Forms of Co-sponsorship

Depending on the groups and the event, cooperation and co-sponsorship may take a variety of forms. Due to the scope of planning and funding necessary to plan a successful campus-wide event, it makes a great deal of organizational sense to co-sponsor campus dances, conferences, speeches/presentations, performances, parties, trips and one-of-a-kind events (such as the Yale College Council's Spring Fling). If a group is considering embarking upon an innovative venture, they would be well advised to split the financial risks and increase potential interest and publicity through co-sponsorship.

Even across these options, the actual level of co-sponsorship itself is bound to vary. Some cosponsors are equal partners in sharing the financial burden and risk of the venture. Examples of this "equal sponsorship" include a concert where all of the singing groups perform together, a rush event hosted by all of the sororities, or bus trips to Harvard for The Game funded equally by the individual college SACs through the Joint Council of Student Activity Chairs.

Due to the differences in budgets, composition and priorities of organizations, however, equal sponsorship might not always be possible. In situations where the partners are not equal, it is reasonable for the "greater fame" to go to those with the "greater claim": for example, as the headlining sponsor, the founding or principal organization could receive a larger font on the posters than the other sponsoring organizations. In cases where one organization has invested more time, money and effort into an event, it is appropriate for this organization to be recognized under the title of "sponsor," as opposed to the title of "co-sponsor" and receive a greater share of the profits. Be gracious with giving credit to your cosponsors as this will create positive working relationships for future years and future events. For example, on its posters for Winter Ball, the Yale College Council always gives special thanks the Freshman Class Council and the Yale University Dining Halls for their help in decorating Commons. In the case of Winter Ball and other co-sponsored events, the sponsor receives a greater share of profits than the co-sponsoring organizations.

Why Cosponsor?

There are many reasons that you might want to solicit Yale cosponsors for your event. First, your event may be so large that it would not be possible or responsible for your

organization to bear the financial burden of the event alone. Here, it makes sense for an organization to seek co-sponsorship as a way of mitigating risk. Spring Fling is a good example of such an event: the residential college councils, the Freshman Class Council and the Yale Student Environmental Coalition all have contributed funds and labor to this campus-wide concert.

At other times, the specific nature of these events or organizations makes it such that other undergraduate organizations have a direct and obvious link. In this case co-sponsorship adds increased legitimacy to the event or to the coalition of organizations. WYBC, as a cosponsor of Spring Fling, makes sense "event-wise"; if the concert is broadcast over the radio, the Yale College Council has a chance to land a better band and to solicit additional corporate sponsors for the event. Safety-Net is an example of "coalition-co-sponsorship"; these groups, with the common and over-arching theme of student-health, have joined to form a coalition through which they can advertise one another services, run freshman orientation sessions, share advisors and other limited resources and meet together with Yale administrators.

Third, a group might not have the labor pool necessary to sponsor an event. In this case, the organization would seek the co-sponsorship of the event with the specific intent of receiving help in setting up, decorations, postering, etc. The Freshman Class Council's help with Winter Ball is a good example of this.

Next, co-sponsorship with a number of organizations lends a sense of validity to some events. In the case of an activist rally, co-sponsorship unites groups with a common spirit to seek progressive reforms. Working together, these groups effectively voice student concerns and positively influence administrative policies. A particularly powerful example of this is the issue of financial aid reform which a partnership of the Committee for Financial Aid Reform, the Yale College Council, Cultural Houses and the Women's Center were able to inspire changes to Yale's financial aid policies.

Finally, if your organization is seeking to host a new or non-traditional event for your organization, cooperation with other undergraduate organizations helps you in your planning stages. The ideas and approaches of the other organization might offer you the perspective you need to make your project a success. In this case, co-sponsorship also helps to increase the "word of mouth effect" as well as decreasing the financial risks of hosting a new and "untested" activity.

The Costs and Benefits of Co-sponsorship and Cooperation

There are many costs and benefits for each co-sponsorship arrangement and it is important that you and your organization understand them completely before seeking/promising cooperation. While the benefits will often outweigh the costs of co-sponsorship, your organization should understand that there are potential pitfalls to this partnership. For example, sharing the financial risks may be appealing, while sharing the profits may be a source of controversy. It is an inherent truth that the more people that are involved with any event, the more deliberative and less decisive the decision-making-process will become and you might find yourself frustrated with endless debates on what type of decorations are necessary to disguise the walls in your college dining hall. In some cases, co-sponsorship might evolve into a situation that places the philosophies of the different groups at odds with one another. In these cases, it is perhaps better not to enter into a partnership with this organization; this is a realization that is best reached early in the process (a night-before-the-event-revelation is not appropriate).

With each event, the costs and the benefits of cooperation will differ. This section was meant to encourage you to think carefully rather than discourage you from embarking on a cosponsorship. In cases where the participating groups are appropriate to the event, however, cosponsorship will have many more positives than negatives. The final section offers some suggestions for success and some guidelines on how to weather any controversies.

The "How-To's" of a Successful Co-Sponsorship

Whatever the particularities of the situation, it is important that the exact details of the cooperation are decided before you seek cosponsors. Certainly, the details are open to negotiation with the other student organizations, but your group should have a firm and clear vision of what you seek from this co-sponsorship. With the members of your organization, you should define your principles and objectives, both of the event and for your reasons for seeking co-sponsorship. If there are items which your organization is unwilling to compromise on, you should make this clear before entering negotiations with other organizations. Be aware, though, that with a little creativity and some flexibility, you may be able to uphold these objectives through a non-traditional route that you hadn't previously considered.

Extensive and intensive meetings between the organization heads should take place early in the process, giving all cosponsoring organizations time to run the terms of the agreement by their respective student memberships before planning for the event takes place. Issues such as which individuals in each organization (e.g. whether the organization President or the event Chair) have decision-making authority should be clearly understood. The terms of the cosponsorship, including financial and labor contributions and profit-sharing, should also be clarified before any partnership agreement is finalized.

A general written agreement, stating the financial, interpersonal and labor contributions and stating the deadlines for each is always a good idea. This "contract" is not so much to prevent other organizations from taking advantage of one another (Yale students and their organizations are generally very honorable) but because the written expression of the partnership encourages groups to clarify their terms and expectations before entering the co-sponsorship. Additionally, this written contract provides documentation and information for future generations of organization leaders considering embarking upon the same project. This contract need not be elaborate; a statement of purpose and a delineation of general guidelines will most likely suffice.

A time-line, with tasks and duties divided amongst the member-groups should be set forth early on in the process. In assigning these tasks and duties, remember to consider the comparative advantage of each group: if one group is small in number but has some particularly talented artists, they should be in charge of chalking while another organizations tackles postering each residential college. Ideally, individuals from each group should serve as liaisons between groups by attending the relevant meetings of its partner organizations to update the memberships on their progress and to hear the reports and discussions pertaining to the cosponsored event.

It is unavoidable that some conflicts and disagreements will arise in the co-sponsorship of events. In order to minimize the damage that such disputes could conceivably cause, organization heads and event chairs should remain in close and frequent contact with one another. A close working-relationship allows for potential problems to be identified and addressed early on in the process, allowing the partnership to continue. In cases where disputes do arise, avoid the temptation to slander via the press, administrative offices or through

discussions with other groups. Instead, remain focused on the end-goal and ultimate objective of the event that you are hosting and strive to achieve those aims. While you might pledge to not work with a particular organization in following years, your objective should be to make the current co-sponsorship a successful one.

The Concluding Quick Notes

The following is a general guideline for co-sponsorship between Yale Organizations:

- A. Conceive of your event.
- B. Define your group's objectives and goals for your event (to make a profit, provide a service, raise awareness or to change administrative policies).
- C. Seek other groups to become co-sponsors (To see the ever-growing list of current registered undergraduate organizations, see the Yale student group information webpage at: www.yale.edu/ug-orgs.)
- D. Enter co-sponsorship negotiations with groups (this stage includes expressing your objectives, goals and purposes as well as deciding upon the terms and details of the co-sponsorship, keeping in close and constant contact with your own membership and leaders of the other student organizations).
- E. Write out the terms of your co-sponsorship agreement.
- F. Determine a time-line of divided assignments and stick to your schedule.
- G. Keep in frequent contact with your partner organizations (attend their meetings and invite them to attend yours, schedule dinner meetings for updates and progress reports).
- H. Work hard.
- I. Congratulate yourself on hosting an excellent event.

Good Luck!

SECTION IV: FUNDING AND FUNDRAISING OUTSIDE OF YALE

Submitted by: Zach Kaufman SY'00, 1998-99 President, Yale College Council

For Spring Fling 1998, while working with outside sources (such as Barnes and Noble, Student Advantage, and AmTrack), the Yale College Council raised thousands of dollars in funding and in-kind donations. This is an example of a successful attempt to fundraise outside of Yale.

A fundraising effort that seeks funds from outside of Yale is one in which an undergraduate organization seeks funds from a business, foundation, or grant, rather than from the Yale administration or other student groups.

However, many people do not know how to go about the process of seeking funding outside of Yale. Furthermore, many people do not know what to expect. This section endeavors to provide some factual information and hints on several important aspects of funding and fundraising outside of Yale.

- A. Why would I want to work with outside sources?
- B. How may I work with outside sources?
- C. Some suggestions for soliciting funding outside of Yale
- D. What are the steps to soliciting funding outside of Yale?
 - I. Your planning
 - II. Meeting with the Yale College Dean's office
 - III. Possible referral to the Yale Office of Development
 - IV. Working with the Yale Office of Development
 - V. Communication with outside Sources
- E. Concluding notes

APPENDIX I: Sample Letter of Inquiry to a Corporate Sponsor

A. WHY WOULD I WANT TO WORK WITH OUTSIDE SOURCES?

Outside sources, meaning non-Yale based coffers, may provide an alternative funding source for your project. As a complement to or instead of using traditional University (see Section I of this guidebook), intra-student group (see Section II of this guidebook), and inter-student group fundraising (see Section III of this guidebook), you may decide to solicit sources outside of Yale.

Working with sources outside of Yale may provide you with resources that you may otherwise not have been able to tap. By doing so, you may be able to increase the overall success of your project.

B. IN WHAT WAYS MAY I WORK WITH OUTSIDE SOURCES?

There are many ways in which you may be able to work with outside sources such as corporations, foundations, and other donors. You may be able to receive money for your project, or you may work with an outside source to put on a joint fundraiser and/or project.

You may decide that, in return for funding, you will advertise the donor. Some examples of ways in which you may advertise the donor as a co-sponsor of your project include:

- Hanging a banner with their logo on it
- Selling/giving away their product(s)
- Placing their logo on your program/posters
- Recruiting opportunities

The way in which you ultimately work with outside sources depends your goals and needs, the type of source, the kind of project you are organizing, and any restrictions placed on you by the University.

C. SOME SUGGESTIONS FOR SEEKING FUNDING OUTSIDE OF YALE:

- 1. Plan as far ahead as possible. To completely and thoroughly pursue funding sources outside of Yale, you should actively be involved in the process for six months to a year.
- 2. Be creative. You may want to combine efforts with groups and people outside of Yale beyond Alumni, Corporate Sponsors, Foundations, and Local Vendors. Brainstorm about any and all other groups that may want to help: museums, similar student groups at other universities, etc.
- 3. Look at organizations that are similar to yours. Did they have success pursuing sponsors? Why or why not? Which sponsors did they land? Use that information in crafting your solicitation process.
- 4. Use any knowledge you may have or may come across to tailor your solicitation to a specific person, corporation, etc. For example, if the head of the company is Native American, you may want to point that out if your project involves something to do with Native Americans.
- 5. Other people who may be able to help: University Librarians are very creative and experienced at searching for information about anything or anyone.

D. WHAT ARE THE STEPS TO SOLICITING FUNDING OUTSIDE OF YALE?

An important note: This is the <u>official procedure</u> for soliciting funds outside of Yale.

I. YOUR PLANNING

- A. First, ask yourself several questions:
 - 1. What are your goals?
 - 2. What are your needs?
 - 3. What are your expected expenses and income?

Think through these questions carefully because they will determine the rest of this entire process.

- B. Second, put yourself in the position of the source you would like to solicit. Answer these (and other) questions:
 - 1. Why would this person, group, or corporation be interested in funding this project? What's in it for them how might this relationship advance their goals and strengths? Do your respective missions align?
 - 2. Why your organization?
 - 3. Why Yale?
 - 4. Why now?
- C. Write a proposal: this is required to advance to the next step.
 - 1. Proposed budget
 - 2. Draft of Letter of Inquiry
 - 3. Tentative list of sources which you would like to solicit.

II. MEETING WITH YALE COLLEGE DEAN'S OFFICE

After thoroughly considering all of the questions above, make an appointment with the Yale College Dean's Office. Contact Teri Barbuto, Senior Administrative Assistant, Yale College Dean's Office (phone: 432-2907, email: therese.barbuto@yale.edu) to make an appointment with Dean Betty Trachtenberg, Dean of Student Affairs, to discuss seeking money outside of Yale for your project/activity.

At this meeting you will present your proposal (the proposed budget, draft of the letter of inquiry, and tentative list of sources which you would like to solicit.) The Dean's office will give you pointers and advice. The Dean's office may also give you the approval to advance to the next step.

III. POSSIBLE REFERRAL TO YALE OFFICE OF DEVELOPMENT

- A. If requests are in line with University expectations, student groups may be referred to Yale University Office of Development: Cornelia Evans, Assistant Director, Yale University Office of Development (and YOD liaison to student groups.)
- B. Once approved and referred to Cornelia Evans, you should fax or email a request for a meeting, along with your proposal to Cornelia Evans (cornelia.evans@yale.edu, fax: (203)432-0386, phone: (203)432-5480). Then, she will schedule a meeting with you.

IV. WORKING WITH THE YALE OFFICE OF DEVELOPMENT DEPARTMENT OF CORPORATE AND FOUNDATION RELATIONS

At the Office of Corporate and Foundations Relations (C&F), you will use resources to plan your solicitation of sources outside of Yale:

A. Cornelia Evans will discuss ways with you to refine and focus your solicitation. Ms. Evans will first review your solicitation list, discuss your goals and objectives, and make suggestions as to how to further target your proposal. She may suggest that you search for more or different corporate and foundation prospects, and she will train you to use the Development Office Library resources to continue to refine your search (see below.)

After your research process is complete, give the complete list of prospects to Ms. Evans who will circulate it among other C&F directors for approval and advice on approaching the companies and foundations you have targeted. The review process serves two key functions:

- 1. It insures that your solicitation will not interfere with other current or potential Yale University proposals.
- 2. It may result in informed advice from C&F directors who manage certain corporate or foundations relationships. Directors can help you identify to whom you should address your proposal or how to craft your request in a way that corresponds well with the institution's current priorities and needs.
- B. Yale Office of Development Library
 - 1. Two main sources of support in the Office of Development:
 - A. For Corporations:
 - 1. Corporate Giving Directory
 - 2. Annual Reports of Corporations
 - B. For Foundations:
 - 1. The Foundation Directory is in the Development Library and is also accessible on CD-ROM

The Foundation Center's Database on CD-ROM:

Search for:

- Foundations
- Corporate Foundations

You may search by grantmaker, grants already awarded, or other criteria to narrow search.

Note: Foundations are much more forthcoming than Corporations about what types of projects/events they consider funding.

2. Other sources of research in the Development Library:

A. For Corporations:

There are no directories that will list what sponsorships corporations have made in the past. Success in securing corporate sponsorships will result only if you seek sponsors whose missions align with yours and if you maintain a clear focus in your solicitation letter on why a *relationship* with your organization would be beneficial *to this company*.

B. For Foundations:

The Foundation Reporter

The Foundation Directory

America's New Foundations

National Guide to Funding in Arts and Culture

International Foundation Directory

Directory of New and Emerging Foundations

C. For Corporate Foundations:

Corporate Giving Directory

International Corporate Giving

National Directory of Corporate Giving

Corporate Foundation Profiles

D.For People:

Who's Who directories

Newspapers

Magazines

Note: It pays to research the individuals affiliated with the prospects you are targeting. You may learn that they are Yale alumni and that they were involved with your organization while at Yale. You may learn that they serve on the board of an organization with a mission similar to yours. Such information can be useful when crafting your letter or placing your follow-up call.

3. Other sources of research:

LEXIS-NEXIS

Contains:

Who's Who Directories

Major newspapers, magazines

To find information on organizations, search under "news"

To find information about people, search under "people"

V. COMMUNICATION WITH OUTSIDE SOURCES

- A. After you have completed this research, you may with to edit your letter to address the particular interests of specific foundations or corporations on your list. Ms. Evans can assist in that process of revision by suggesting information you might include in the letter. See below for a sample Letter of Inquiry.
- For Foundation proposals, read the guidelines carefully and make sure you submit the proper number of proposal copies or supplemental information (such as financial statements and proof of tax exempt status). Ms. Evans can help you compile some of this information.

B. Follow up with prospect

Approximately one week after your letter of inquiry is sent, give the corporation or foundation a follow-up call – regardless of whether they are local or not. Ask if more information is required, or if there are any questions about your proposal. Similarly, if your proposal is declined, call to discuss the reasons why it did not fit the prospect's needs, and, for future reference, keep notes of the reasons they give

C. Stewardship

If you are successful in your attempts to raise funds, write a thank you note to the prospect and make sure you understand any reporting requirements they have or advertising credits they desire, etc. Appoint one of your organization's members responsible for making sure that your organization meets their requests and that it files the required reports during the following academic year.

D. Follow-up with the Office of Development

Call, email, or fax Ms. Evans with the results of your search for funds. The information you provide will help the Office of Development keep track of all Yale interactions with the corporation or foundation.

E. CONCLUDING NOTES

Fundraising outside of Yale is a long, arduous, and often rewarding process.

From start to finish, it took me about six months to fundraise from corporate sponsors for Spring Fling 1998. Although only a handful of the businesses I solicited actually decided to commit to sponsoring the event, I learned a lot. My experience taught me that, while the journey is difficult and I should not have high expectations, the process is often rewarding. It also taught me that to pursue funding outside of Yale, an organization should start anywhere from half a year to a year before the actual event. Furthermore, I pioneered relationships with several important corporations and the YCC may use those relationships again to help sponsor other events, such as future Spring Flings.

Many of the sources you pursue outside of Yale will turn you away. I know it is frustrating, but, if you do land even one of your pursuits, then you have accomplished something for your organization and that particular event. It might mean the difference between holding your event

and having no event at all. Even if you do not land any non-Yale sponsor, perhaps you have achieved something still: making national groups aware of your organization's pursuits.

When you do pursue outside sources, take a lot of notes on your experience so you can begin an institutional memory for your organization. Once you land a non-Yale sponsor, try to court them for future sponsorship opportunities.

Please contact me if you would like to talk more about this process or my experiences with it. Also, please follow the steps in this section. And, don't worry, there are many people along the way to help you with every aspect of your fundraising search.

Good luck!

APPENDIX I: SAMPLE LETTER OF INOUIRY TO A CORPORATE SPONSOR

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Yale University Black Pride Union

211 Park Street, New Haven, CT 06511

Travis Smiley Black Entertainment Television 1900 W Place NE Washington, DC 20018

Dear Mr. Smiley,

We, the Black Pride Union (BPU) of Yale University, cordially invite **Black Entertainment Television** to collaborate with us in launching the 4th Annual Black Solidarity
Conference entitled **Renaissance of a People: Solidarity in the New Millenium**. This
intercollegiate convention will be held in New Haven, Connecticut from Thursday, October 29th
through Sunday, November 1, 1998. In the past three years, we have assembled an audience and
an event that is building Black leadership for the 21st century, and in so doing, we seek the
partnership and participation of companies like BET that share our intentions in addressing the
Black community. We would like to introduce you to our organization's purpose and its passion,
and then extend to you an invitation to become a part of this event.

BPU is a student-run organization that focuses on identifying and celebrating holidays and historic events that are of importance to the African-American. Annual even have included the observance of Maafa (the Black Holocaust); the anniversary of the assassination of El-Hajj Malik Shabazz (Malcolm X); Martin Luther King, Jr.'s birthday; Kwanzaa; and Black Solidarity Day, which has been expanded to a weekend event for the past three years.

The Black Solidarity Conference exists to provide its participants with the opportunity to meet students from leading colleges and universities across the country in order to create and facilitate a network of socially conscious Black men and women. We accomplish this task by opening the lines of communication and creating a dialogue among the foremost minority students from our nation's best institutions of higher learning. Each year, over **300 students** from over **100 campuses**, including Harvard, Princeton, Brown, Morehouse, Wesleyan, Howard, and the University of Pennsylvania. This year we expect even more participants from a growing diversity of schools.

This conference is a forum for the exchange of ideas and the display of young Black talent that focuses on pertinent issues in our communities, and identifies potential solutions. Students engage in workshops facilitated by leading scholars, community activists, and exemplary officials on the subject of minority affairs in this country. Together, they develop strategic plans for rectifying problems that affect our generation and our population by sharing ideas and pooling resources to ensure that the efforts made during these four days have a farreaching and lasting impact on our society. Featured speakers at past conferences have included

Angela Davis, Dr. Jawanza Kunjufu, Kevin Powell, and hip-hop artist Chris Parker (KRS-One), and the list of this year's prospective candidates is nothing short of stellar. We have invited Amiri Baraka, Gloria Naylor, and Nathan McCall among several notable individuals who represent the creativity and cognizance in the national Black community.

In preceding years, we have been able to offer our sponsors a chance to reach the distinguished diversity of conference participants (over 1,500 young men and women to date) through advertisements and listings in our Black Solidarity Booklet for donations **up to \$1,000**. (This and all following figures may be met by monetary and/or in-kind donations.) In 1998, we are prepared to offer two new sponsorship opportunities.

For donations between \$1,000 and \$5,000, BET will receive:

- u the opportunity to have your company name/logo appear on workshop materials (folders, notebooks, pens, etc.) and promotional items (T-shirts, mugs, decals, etc.).
- an invitation to participate in the **Recruiting and Resume Exchange** to be held on Saturday, October 31st. This will allow a representative from your organization to display literature, answer questions, and recruit and accept resumes from the talented pool of conference participants.

And for any contribution **exceeding \$5,000**, the Black Pride Union would be pleased to offer:

an opportunity to advertise your organization at the **Black Solidarity Banquet**. This event is the site of the keynote address, and is traditionally attended by 500 Yale faculty and students, New Haven residents, and conference participants who represent 18 states and approximately 180 campuses.

As you can see, Mr. Smiley, the Black Solidarity Conference is exciting, informative, and rewarding for its participants and its sponsors. We are confident that this year's conference will supersede the level of excellence that past conferences have attained, and it would be our distinct pleasure to collaborate with **BET** on the production of this event. Your support will ensure that we continue our efforts to build leadership and strengthen our communities for the 21st century. Thank you for considering this opportunity to join in alliance with the Black leaders of tomorrow, and we will follow this letter with correspondence to discuss your sponsorship interest.

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Ayanna M. Johnson

Conference Funding Chair (202) 562-2193 ayanna.johnson@yale.edu

Stephanie Etienne **Co-President, BPU** stephanie.etienne@yale.edu

Anana Charles **Co-President, BPU**anana.charles@yale.edu

Encl. Schedule of Events (BSC 1998)

cc: Sheila Johnson

APPENDIX II: AN OVERVIEW OF FUNDING AT HARVARD

Submitted by: Beth A. Stewart, 1998-99 President, Harvard Undergraduate Assembly

Harvard's undergraduate funding system is as legendary for its murkiness as it is for its inadequacy. Like Harvard herself, the system of funding is highly decentralized and often therefore presents a challenge to those trying to determine which of the various funds is the appropriate one to which to apply.

The primary source of undergraduate student group funding is undoubtedly the Undergraduate Council, or student government. Since 1982, most of the 6400 students of the college pay an optional \$20 termbill fee to the Council each year. In total, the Council collects approximately \$120,000 annually. Approximately 65% of this is set aside for grants to student organizations.

Several other funds on campus supplement the \$80,000 or so that the Council provides. They are listed below:

Presidents Public Services Grants Harvard Foundation Grants (for groups which facilitate	\$60,337 \$24,000
understanding and sharing of racial and ethnic perspective)	•
Office for the Arts	\$25,000
Office of the Dean of Students (Discretionary)	\$8,000
Dean of the Colleges Discretionary Fund	unknown

At best, therefore, the College distributes approximately \$200,000 in grants to undergraduate organizations.

Officially, the College spends 1.2 million in unrestricted funds on student activities, according to the Dean of the Faculty of Arts and Sciences, but just where or by what process this money is spent is neither apparent nor public.

Student group funding has clearly become one of the main focuses of student lobbying. The Undergraduate Council alone receives grant applications amounting to \$300,000 in requests, an amount it is hopelessly unable to meet.

The student theory is that the College's decisions on how to support student groups might be described as the band-aid method, which means that the College tends to create new funds in response to bursting need. For example, after the College's minority population increased dramatically in the '80s and '90s, the College responded with the Harvard Foundation Grants to help promote an understanding of racial and ethnic perspective. Similarly, the construction of new music facilities increased artistic interests and possibilities, which may have inspired the creation of the Office for the Arts Grants. Most recently, the student government won a victory by convincing the Dean of the College to initiate a new \$25,000 fund for all student groups.