INITIATIVE COOKBOOK

HOMEMADE CIVIC ENGAGEMENT:
AN INTRODUCTION TO PROJECT MANAGEMENT

A Theodor-Heuss-Kolleg Handbook
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INTRODUCTION: SERVING UP CIVIC ENGAGEMENT

When we're hungry, we do something about it: we eat. Likewise, when we're dissatisfied with something in society, we have the power to bring about change. Of course, in the fast food era, you don't necessarily have to cook for yourself. But you can't live on pizza, burgers, and fries forever. The same is true of social problems: complaining usually makes you less satisfied and does not provide a real solution.

Homemade things are better than store-bought ones

At the Theodor-Heuss-Kolleg, we prefer to make things ourselves. We procure fresh ingredients that we enjoy eating. We prepare them carefully and share the meals we cook with friends, at a table big enough for all of us.

When we begin a civic engagement project, we determine what we think is important, either alone or within a team. We develop our own ideas and solutions for the world around us, with other people we value and respect.

Some of this work doesn't require money. After all, the things that money can't buy are some of the most important things in life, which is a good reason for becoming socially engaged and shaping your own menu and environment.

Active influence

We hope that the Initiative Cookbook helps you develop your own recipes and helps volunteer initiatives to foster group action. We hope readers acquire a taste for these activities and discover new solutions beyond already existing recipes. Some of our recipes you can follow on your own, but this book should primarily encourage a desire to try things out for yourself.

That's why we feel it is important to disagree with the popular saying: Too many cooks spoil the broth. Of course, it is a challenge to work with many different people, with many cooks who have learned to cook in completely different ways. We might have to organize our work anew or find other ways to work together. But the more cooks we have, the better and more varied our cuisine becomes.
For democracy to really work, we have to participate actively. Democracy also needs gourmet chefs, editors-in-chief, parliamentarians, food photographers, and CEOs of food companies. But this handbook is addressed to all the playful amateurs out there. For it is the amateurs who can speak directly to and inspire all the different people that make up a society.

**Thank You**

This book, too, is the result of a collaborative effort. The coaches, program managers, and former participants of the Theodor-Heuss-Kolleg all contributed their specific experiences in coaching and consultation during volunteer initiatives. Working Between Cultures brought their expertise on communication, diversity consciousness, and teamwork.

Our heartfelt thanks goes to: Maria Prahl from Working Between Cultures for suggestions regarding communication. Ivelina Kovanlashka from Brot für die Welt for her critical perspective. Anne Dörner from the Social Entrepreneurship Akademie for inspiration to continue. Laura Werling of MitOst for ideas on storytelling. We'd also like to thank coaches and project experts Maxim Stepanov (for thoughts on time and crowdfunding), Silvina Garelova, and Helena Baumeister (for their valuable inspiration).

The authors
DEVELOPING IDEAS
WHAT’S ON THE MENU?

Recently, at a dinner with friends, there was a delicious dish, and you asked for the recipe so that you could try it out yourself! But once you were at home, you immediately forgot about it – and you ate pizza again. It’s often like that with civic engagement as well. Ideas for “new things we can try out” develop quickly, but they often disappear just as fast. You might get inspired and try something you haven’t tried a hundred times before…

When you want to cook something, first you have to think about what you’d like to eat and what ingredients you have in the refrigerator. Only then can you decide what you are going to cook and how. This same principle translates to civic engagement: a comprehensive analysis is a necessary requirement for successful work. Only then can good ideas develop. Only in this way can motivation and resources be channeled correctly.

In the idea development phase, there are important decisions to be made: What issue are you interested in and why; which goals and changes do you want to achieve; and how specifically do you want to implement them. Therefore, it is important to review the following considerations carefully right at the beginning:

My interests

• What issues are important to me?
• What can I already do, what do I already know?
• What would I like to learn or try out?
• What kinds of projects am I ready to commit to?

My environment

• What bothers me about things as they are now?
• What is working but needs more support?
• What would I like to change?
• What hasn't happened yet?

By considering both the personal and the social aspects of an issue, you can strengthen the entire initiative over the long term and increase the chances of its success and effectiveness. Why?
**FINDING MOTIVATION WITHIN MYSELF**

When you work on something that really interests you, you are much more prepared to put energy into it. In this kind of situation, you aren’t motivated to act just because “you’re supposed to” or because there are funds to do it, but because you are personally involved.

Your goal can be to change something, or to make the situation better or fairer, or to learn something new, to have new experiences, or to overcome challenges. However, this is also a way for you to put your existing skills and talents to use, enriching the initiative with your own knowledge and abilities.

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**FINDING MOTIVATION WITHIN MY ENVIRONMENT**

Doing things because we find them enjoyable is perfectly reasonable most of the time, but when it comes to civic engagement, there is more at stake. Civic initiatives involve working with society for society. Some people may find the significance of such actions and the responsibility they entail to be a bit overwhelming. But even if you only make changes to the street where you live, you are already part of civil society, which needs such local initiatives the same way it needs the work of Amnesty International. In other words, it’s all about social change around you. Once you’ve realized that something in your environment isn’t working well, or isn’t working at all, how do you transform that realization into an idea?

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***Checklist: What really interests me?***

The act of thinking about these two sources of motivation can itself spark inspiration: You might remember ideas you had long ago. You might gain a new perspective on the “obvious” – activities you’re already doing with the people you spend time with – or you might develop something completely new...
Checklist

WHAT REALLY INTERESTS ME?

WHAT ISSUES INSPIRE ME TO LISTEN CLOSELY AND DISCUSS THINGS FURTHER?
WHEN I'M BROWSING THE INTERNET, WHAT KEEPS ME FROM CLICKING AWAY?

WHO ARE THE PEOPLE I FIND MOST INSPIRING? WHY? WHAT VALUES DO THESE PEOPLE EMBODY?

WHAT DO I PARTICULARLY ENJOY DOING, OR WHAT DO I DO PARTICULARLY WELL?

WHAT ABILITIES WOULD I LIKE TO DEVELOP?

WHAT HAVE I DONE BEFORE AND WHAT HAVE I FORGOTTEN ABOUT?

WHAT WOULD I LIKE TO TRY OR LEARN TO DO?

WHAT DO I FIND INTERESTING AND EXCITING, BUT HAVEN'T YET DARED TO TRY?

WHAT REALLY MOVES ME, WHICH ARE THE PROBLEMS THAT I CAN'T IGNORE?

WHICH OF THEM WOULD I LIKE TO CHANGE?
**Method**

**ASSOCIATIONS**

This method helps generate ideas. Associations people have with specific terms are collected, analyzed, and classified. They form the basis for an activity’s first idea.

Two or three people sit down, back to back on the floor. An appointed secretary receives five to seven A4 sheets of paper, each with a word or phrase written on it.

You can choose five to seven ideas from this list: My neighborhood, challenges, problems, initiatives, project, team, surroundings, environment, sustainability, politics, people, injustice.

The secretary reads out the first idea and writes down the others’ free associations. After a minute, the next one is read aloud.

Important questions for your analysis: What are the most interesting ideas? Which (different) associations did you have with them? What wasn’t mentioned?

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**Method**

**VISION**

Write down all the words and associations that occur to you when you think of each specific issue. When working with other people, it is especially important to do this without censoring yourself or making comments. Make a note of the most important key points or keywords.

If you’re using small post-it notes or individual pieces of paper, you can then group, evaluate, and sort the results...

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**Info**

**HOW PEOPLE ARE CHANGING THE WORLD**

- As voices against injustice
- As promoters of environmental and social awareness
- As presenters at conferences, forums and summits
- As trainers, mentors, coaches and tutors
- As artists, musicians and actors
- As organizers of petitions, campaigns and protests
- As entrepreneurs creating businesses and jobs
- As volunteers and fund-raisers for charity
- As conscious consumers
- As responsible users of natural resources

Inspired by: www.tigweb.org/action-tools/guide
EXTERNAL INSPIRATION

Of course it is also possible that there will be initiatives “from the outside” due to a request or an offer from the outside world, for example if your school principal announces: “We need activities for our summer celebration.” Or maybe from a local city representative who provides financial support for a local history project. Even those who volunteer at an organization occasionally have the chance to implement their own initiatives.

External inspiration shouldn’t be the only impetus for an initiative, because “made-to-order” civic engagements go stale over the long term. But it’s worthwhile to investigate where you could get involved and who supports certain types of projects.

When the initial ideas have been generated and you want to begin immediately, it is still a good idea to take a step back – what does it actually mean to do something with society for society? To state it perfectly clearly: it’s about changes that are beneficial to more than one person.

Example

**MY GERMAN**

My German could be better. If I take a German language course and combine that with a trip to Germany, I’ll improve my German and better understand cultural differences.

Example

**OUR GERMAN**

My German could be better, and the same goes for some of my friends. I’ve organized several German afternoons where we watch films in German, invite German-speaking exchange students over, etc. After a while, our speaking skills improve as well as our understanding of cultural differences.

**Checklist: Environment for my civic engagement**

- Which associations or organizations are already active in my area?
- Which organizations are working with issues or methods that also interest me?
- Which local events could I support with my own ideas?
- Which opportunities to support civic or social initiatives are there from public institutions or private foundations?
**Method**

**ENGAGEMENT BRIDGE**

Draw a bridge. The side closer to you is the **current state**. This is where you make a note of everything that occurs to you when answering the questions below.

Afterwards, you will go to the far bank, or the **future side**. On this side, write down what you'd like your initiative to change. Be as specific as possible.

Now you can think about the possible **steps to get there**. Imagine what the bridge looks like, who the people are who cross it, what can happen and how.

If you're working in a team, after working independently, you can share what you've come up with for your individual bridges. You can build the bridge from various materials. Just make sure that the ideas and answers are written down.

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**Bridge**

- How can I implement the change I want to see?
- Why me?

**Current state**

- What is needed? What is the problem?
- What exactly is bothering me?
- Why is that a problem?
- What worsens the problem or prevents the solution?
- What would the future look like if things continue as they are?

**Desired state**

- What is the situation now?
- What exactly has changed?
- What improvement do I see?
- How do I recognize it?
**SMART GOALS**

This term comes from project management and is used to describe goals. The five letters stand for:

**S** - specific
What exactly do I want to achieve?

**M** - measurable
How can I measure whether I have reached my goal?

**A** - accepted
Do all the people involved agree with the goal?

**R** - realistic
Is the goal achievable under the given conditions?

**T** - time-related
When should the goal be reached?

One way of describing your own goals with the help of these five aspects can be seen in the film “How to Write a Smart Goal.”

**DEFINING GOALS**

One approaches a vision step by step. In order to find the path, it is important to formulate clear and concrete goals. At the same time, it is worth checking in to make sure you are still on the right path.

**Clear and positive formulations**

A well defined goal provides orientation that describes exactly what effect the initiative should have: the people involved are informed and motivated. There is a clear result that can be examined and shows whether or not the initiative was successful. For example, thanks to the work of those involved in the garbage clean-up action described below, the forest is now clean. The goals are represented positively – people are motivated and not passive.

**Create boundaries for deadlines and content**

Many problems are deeply embedded in society or are the result of a lack of opportunities. The action from the example below cannot solve the problem of a lack of garbage removal. But the people involved understand how important their own behavior is and that it can bring about change. There will be specific improvement in the future.

**Example:**

**COLLECTIVE GARBAGE CLEAN UP**

The team offered an environmental workshop for children. The children started a cleaning campaign in the forest and their families took part.

- The children informed themselves about the garbage problem in their area
- They understood how important it is to protect the environment.
- The forest is now clean
- Inhabitants take responsibility for the public space in their neighborhood
- People are motivated to get involved
DESCRIBING SOCIAL IMPACT

A civic action benefits not only those who helped clean up, but everyone who spends time in the forest. The people involved don’t just act once, but care for the future as well. People’s work persists after the action is over and sows the seeds for new action.

Chain reaction: Starting from a small initiative created by individuals, initially the core target group benefits, then the extended range of target groups, then ideally the whole society.

☞ Checklist: Sustainability and effects

NEEDS OF THE TARGET GROUP

The example of the collective garbage action on p. 15 reveals another aspect of this phase of idea development. In addition to the children, the family members are a very important target group for the action. They receive information, their attitudes change, and they also help clean. If they think that an action of this kind is just a waste of time because the forest will just fill up with litter again and what they do is their own business, that might be a sign that an important planning step was missing: the definition and analysis of the target group.

There are other components involved in the course of planning. In the fourth chapter, the research and analysis of the target group and their living conditions is discussed in detail.

☞ Checklist: Target groups

FORMS OF ENGAGEMENT

Find the path suited to your own ideas: The best manner and method for implementing your idea depend on the specific situation, particularly on the goals and the target group.

Film series, evening discussions, citizens’ initiatives, and working groups take place regularly. Here, the participants’ energies and motivations are spread out over a longer period of time. Many people need to help in achieving the goal without losing motivation or running out of steam. In contrast to this,

Info

METHOD AND MANNER

These questions will help to define the methods of your initiative:

• How can I best reach other people? What do they find interesting?
• How can I best share my ideas? What is the best way to discuss my concerns?
• Are there already other people who are doing something similar, and how can I work with them?
a concert, a demonstration, or a garbage clean-up action are initially one-time events. In these cases, a team mobilizes all its forces over a manageable period toward one result. Whether or not other activities with the same people take place will be determined over time.

**ACTING SUSTAINABLY**

The true effect of an initiative cannot always be predicted. Often allegedly “small” activities create change and solve social problems. Sometimes things remain a “blind action” without really connecting to the local environment. Acting sustainably does not mean that each civic engagement must be a long-term project. Instead, it means taking conceivable consequences into account, thinking about how things could continue, and critically reviewing expenditures and the use of funds. It is also worthwhile to consider the logic of the idea, and how it could be further advanced. The target group is also important in this respect – they are the people who can best ensure that the concerned changes are sustainable and are supported by everyone.

 inex Checkliet: Sustainability and effects

**THE RECIPE’S DONE, WHAT’S NEXT?**

The recipe for the desired change has become more specific and concrete. During the transition to the planning phase, it can be helpful to structure all your associations, considerations, and ideas. In this way, you can examine whether everything that is important and necessary has been considered or whether there are still a few missing “ingredients.” In addition, you need a clear conception of the future in order to make it appealing for others to help cook – whether as team members or supporters. This involves organizing your own workflow and organizing ways to involve others and gain their support.

This table can serve as the “basic logic behind the initiative” – some of the questions will be answered at the end of this chapter:

<table>
<thead>
<tr>
<th>People</th>
<th>For whom?</th>
</tr>
</thead>
<tbody>
<tr>
<td>What do they think? How do they see the initiative?</td>
<td>Target groups Partners Other important beneficiaries</td>
</tr>
<tr>
<td>Why?</td>
<td>What?</td>
</tr>
<tr>
<td>Motivation Existing social problems Contribution to a solution</td>
<td>Activities Concrete social impact Outcomes</td>
</tr>
</tbody>
</table>
Checklist

Target Groups

Whom does my idea concern? Whom am I trying to reach?

In what respect is my initiative relevant to these people? Do they see the current situation as problematic?

What exactly are these people interested in?

What could motivate the people concerned to support the solution to the problem?

What can the people concerned contribute?

What might prevent them from taking part? What could encourage them to take part?

Further analysis and research:

Δ Target groups chapter
Checklist
SUSTAINABILITY AND EFFECTS

CAN I ACHIEVE THE DESIRED OUTCOME THROUGH THIS INITIATIVE?

DESIRED OUTCOME ... HOW WE WANT TO ACHIEVE IT

•
•
•
•
•

ARE THE GOAL AND THE ALLOTTED EXPENSES MATCHED TO EACH OTHER?

HOW COULD THINGS CONTINUE WHEN MY INITIATIVE IS OVER?

WHAT WILL HAPPEN TO THE PROGRESS AND OUTCOME WHEN EVERYTHING IS OVER?

WHO WILL CONTINUE THE INITIATIVE?
PLANNING
CHOPPING, STIRRING, SEASONING

There are so many steps that have to occur for a recipe to turn into a dish that looks like the attractive photos in a cookbook – but it works because someone made a plan. And to turn ideas into specific steps, you need a lot of imaginative power. All the steps that lead to successful implementation should be thought through as realistically as possible: How the plans are carried out specifically, how you structure time and tasks, etc.

When you plan something, you usually go through different phases – first an idea develops, then it is examined and becomes more detailed. Many different kinds of tasks need to be formulated, assigned, and completed. The planning process is reviewed and adapted again and again, until at the end you arrive at the “final” concept, which is then implemented. Some people think of this concept as a prototype that is then tested. Other people think of engagement as a circle, where at the end of an action, new ideas for future initiatives are generated.

1. IDEAS AND GOALS

The previous chapters described how one can harness inspiration and visions to create basic initial ideas. Condensing these into something more concrete takes a little time.

At first, you will have many different suggestions that seem to be equally valid. Is there anything that seems to be too extreme at first glance? Are any of the ideas a little crazy? Even if they are, you should examine them carefully. Because interesting solutions often develop from ideas that seem silly.

Don’t rush the process of evaluating and organizing the details of your initiative. You might take time with your team to look into:
- The most fantastical utopian idea.
- One feasible, realistic approach.
- One idea with a surprising solution or impact.

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**Five steps of project work**

1. Develop ideas
2. Organize and evaluate
3. Research and understanding
4. Adapt concepts
5. Concept or prototype
2. ORGANIZING AND EVALUATING

After this step, one approach or few possible approaches are selected. The criteria for the final selection of an idea occur on the following levels:

- personal level
- goal level
- value level

3. RESEARCH AND UNDERSTANDING

After you choose an idea, the concrete planning can begin. Perhaps it is not yet clear which form the initiative should take, whether it should be a film or a blog or both. A few friends have voiced their interest, but whether and how they will actually participate is still unclear; the consensus is that the topic is important – but does the target group think so too?

The initiative needs additional research to understand and assess the many layers of the idea.

Observation is part of understanding. Here, it is important to **empathize** with the people in the target group.

Even if you are part of the target group, you have to be careful not to assume that others have the same needs as you. This **self-reflection** helps us avoid ignoring the needs around us. Therefore, the research methods presented here use categories we have already discussed: Myself – Participants – Issue – Environment.

⇒ Checklist: Target groups, chapter on target groups

### Info

**CRITERIA FOR SUCCESS**

#### Personal level

What do I know, what do I want, what can I do, what do I have?

- make use of existing abilities and interests
- your own motivation is an important factor
- your abilities suit your role in the project

#### Goal level

What do I want to achieve? How can I do that?

- methodology and approach have a social impact
- the planned means and resources suit the idea

#### Value level

What motivates me to get involved?

- Your own position is authentic and is fitting, like the resources for the idea
- Others benefit from the initiative; the initiative contributes to the common good
- Your goals and collective goals are described transparently
- the team and target group work and participate together

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**Myself**

My resources – money, time, relationships. Skills with certain methods and content. My own development goals and needs.

**Participants**

The participants/target group’s biographies, needs, interests, and social conditions (e.g. time for the engagement, limitations, financial means).

**Issue**

Issue or task at hand. Forms of collective work that the target group/participants are familiar with and find interesting.

**Environment**

What is happening in the world around the project: What activities are taking place; what social, cultural, and political events are happening, etc.
Method
**RESEARCH: INTERVIEW**

By asking questions, you can identify the current conditions or learn how experts have evaluated a certain topic. In addition to individuals, you can also consult institutions and organizations that work in the field. Beforehand, you should develop a line of inquiry or a list of questions that you use in all the interviews.

Variation

The people in the target group are often “experts at their own thing.” You should also ask them questions. They can also help you create a series of questions.

[†] Checklist: Interview

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Method
**RESEARCH: PARTICIPATORY OBSERVATION**

Observe the situation or environment that you want to change with your initiative. You can make notes about the environment, make drawings of it, or take photos that you evaluate afterwards. This is how you can learn about typical routines or behaviors. Interviews can supplement this observation.

Even if you believe you know the situation well already, participatory observation can help you uncover latent prejudices. In addition, you encounter existing ideas, resources, and networks. In short, you don’t have to “invent” anything that already exists.

Example: More bikes!

You want to campaign for bike riding. Ride through the city at different times over several days and notice who is traveling when, where they are going, and with which means of transport.

Example: Eating healthier

You want to expand the meal offerings in the school cafeteria. Spend a day in the kitchen and become familiar with all its working processes and tasks.

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Method
**REARRANING NOTES ON THE WALL**

This method can help you structure your ideas and processes. Write individual keywords relating to results, information, or ideas on sheets of paper, then put them up on a pegboard or on an empty wall.

Organizing

Notes with the same or similar content are hung up underneath one another. Notes with new content are hung next to one another. In this way, you can create order. At the same time, new points of emphasis emerge, and you can develop them.
4. ADJUSTING CONCEPTS

With research, you will continue to gain knowledge of the specific situation, the issue, and the tasks to come. This can cause ideas to change during planning phase. You adjust them. Perhaps they are expanded or made smaller, planned in conjunction with another target group or a new method...

Sometimes research brings about so much new information and so many new ideas that you lose your overview of the situation. Organizing is necessary so that you don’t lose track of the actual goal or important tips and contacts just because you can’t find them any more.…

Method

ADJUSTING CONCEPTS: G-C-M

Using a computer, create a table with three columns. In the first column, describe the goal for a certain planning phase or for a specific task, in the second, collect the content, e.g. questions you want to ask or specific information that you need. In the third, note the method – podcast, text, discussion – and everything that you need to do it.

<table>
<thead>
<tr>
<th>Goal</th>
<th>Content</th>
<th>Method/Material</th>
</tr>
</thead>
<tbody>
<tr>
<td>• find team members</td>
<td>• engaging text, attractive format</td>
<td>• Facebook page</td>
</tr>
<tr>
<td>• learn about the current situation</td>
<td>• description of the initiative</td>
<td>• notify your WhatsApp group</td>
</tr>
<tr>
<td>• description of the initiative</td>
<td>• photos of…</td>
<td></td>
</tr>
</tbody>
</table>

After collecting, evaluating, and organizing, the planning phase is almost done. Now it’s about implementing the concept. By the way, you should always keep ideas that you aren’t currently using, you might need one of them for a plan B. You may want to adjust the concept during the implementation phase as well because:

• **outside circumstances change**: it rains on the day of an open-air performance; the expert cancels on the evening before an event; the train workers go on strike…

• **the experiences** within the team are growing: something you didn't think you were capable of at the beginning of the planning phase is now something you want to try out; a team member acquires new skills at a training seminar, etc…

• **the target group** requests it: Seminar participants express a desire to change the daily program; through successful advertisement more participants are coming than expected…

• **there is an increase in public interest**, and the city administration would like to support the initiative with more money; the school wants other grades to participate; opponents protest the initiative…

In other words, you can't foresee all the changes, but you can notice them over time by performing regular monitoring and adjust your plans accordingly. In other situations, you have to react spontaneously – which is not a problem if you have sufficient time.
Checklist

RESEARCH INTERVIEW

DISCUSSION WITH:                        DATE:
........................................................................................................................................

ORGANIZATION AND ROLE:
........................................................................................................................................

LOCATION:
........................................................................................................................................

CARRIED OUT BY:
........................................................................................................................................

HIGHLIGHTS: WHAT WAS INTERESTING, SURPRISING, INSPIRING

LOW POINTS: WHAT WAS UNINTERESTING, DISAPPOINTING

CONCLUSIONS

ADDITIONAL INFORMATION: CONTACT INFORMATION, WEB SITES, SOURCES...
TIME

Time is a complicated thing: it runs evenly along a line but it also makes leaps. It is subjective and is perceived very differently by different individuals – listening to music on the sofa for two hours feels different than sitting in traffic for two hours; two hours watching a film can be long for one person, and extremely short for another...

However, groups, institutions, and organizations usually have a similar understanding of time and how they engage with it. Anyone who attaches importance to maintaining relationships and getting people involved prefers to plan in such a way that needs are discussed often and with flexibility. You want to achieve your initiative's goals, but shared experience is also important.

In this context, parallel planning refers to bringing many things together at the same time: satisfying current desires, needs, possibilities, and tempos, but also achieving social impact and obtaining results. Since discussions and openness to ideas from the outside fosters new possibilities, the result you come up with at the end can be very different from what you initially planned.

For other people it is helpful to plan things as clearly as possible so that they can attain an overview and gain (self) control. They like to plan ahead. In this case, it is about completing tasks in rapid succession and arranging them in a logical order.

For example, schools plan their years in a linear and structured way. They have clear curricula that specify what has to be accomplished by the end of the year. Grant applications describe clear goals and results, as well as the path to get there.

In these cases, planning consists more of preventing surprises and, when they do appear, accommodating them in a way that does not endanger the overall project. In the end, the goals are achieved as planned.

Info

CHRONOS AND KAIROS

In Greek mythology, two gods were responsible for time – Chronos and Kairos. Chronos represents standard time, time that flows and is counted in seconds. Kairos symbolizes the now or never.

Chronos time is structured and helps us make plans. In contrast, a Kairos moment is absolutely personal and unforeseeable. In this way, Kairos can override the rules of Chronos time.

Method

POMODORO TECHNIQUE

Frequent breaks increase mental agility. For this reason, the Italian Francesco Cirillo divided his tasks into 30 minute intervals, in which for he concentrated for 25 minutes on working as hard as he could in order to grant himself a five minute break afterward.

The name “pomodoro” comes from the kitchen clock that Cirillo used in this attempt. It was in the shape of a tomato, which in Italian is pomodoro.

It is important to note that it doesn’t matter whether the intervals are 30 or 60 minutes long. What’s important is that you alternate working and breaks…
### Method

**ABC Analysis**

This is a method you can use to plan your entire initiative, a subtask, or a work day. Create a list with all the tasks and organize them according to importance and urgency:

- **A** – WHAT HAS TO BE DONE?
  - IMPORTANT AND URGENT
- **B** – WHAT SHOULD BE DONE?
  - FAIRLY IMPORTANT, NOT VERY URGENT
- **C** – WHAT CAN BE DONE?
  - LESS IMPORTANT
- **D** – PARKING LOT
  - NOT IMPORTANT, NOT URGENT

If you sort tasks according to ABC, you'll recognize an order within them – which tasks are absolutely crucial because nothing else can take place?

What would be nice to have, but can be shifted to slot C or D if need be?

### Time Management

Of course, no one wants to fail, so you “manage” your time in order to convey to yourself and others that you have everything under control. Today, there are numerous exercises, computer applications, and apps that can help you manage your time – but do they really work?

Some applications are truly useful. Some exercises might help you understand how to manage time better or to create a shared understanding of timely planning in a team. But time management shouldn't make more work than the work itself. Therefore, it's important to understand your personal relationship with time. This applies to your own life as much as it does to volunteer work.

### Checklist: Your own time management

**Time and task planning**

Time and task planning go hand in hand. Before you begin detailed planning, you should first personally examine how much time you can and want to dedicate to the initiative.

When all the team members have answered those questions, you can continue with general planning. Here are the most important questions, with examples in the box on the left.

If you have the task list and the rough time framework, you should re-examine whether they are both realistic. Your plan might need to be adjusted: you might need to take on fewer tasks over the same time period or achieve the same tasks over a longer period of time.

### Table: Schedule

**Example**

**Street Art Film**

You would like to make a film about graffiti artists in your city and describe what the neighborhood thinks of them. Questions for the schedule:

- How long will the entire initiative last, when do which steps take place, such as artist research, film shooting, editing, and the premiere?
- What outside appointments are there – application deadlines, street art festivals, holidays?
- If you think through the entire initiative from beginning to end, which steps are there? In what order?

### Accountability

Hold yourself accountable by asking your team for support. It can often be difficult to stay in control, but others can help us. Inform your team as to when you will have finished certain tasks so that they are also aware of your deadlines.

Source: Global Changemakers – Project Management Toolkit
Method

PERSONAL TIME BUDGET

Time line and important dates

Create a time line with the months in which the initiative is to be implemented. Enter all your personal, educational, and professional deadlines, appointments, and phases during which you cannot work on the initiative:

List of regular activities

List all the things that you do in the week that you definitely want to continue doing – exercising, meeting friends, connecting with people on Facebook…

After that, compare and adjust your list with the team – in this way you can create a shared time frame, with which you can survey, who can work on what areas of the initiative when, and how much time everyone is able to invest. This table can be re-adjusted during project implementation.

<table>
<thead>
<tr>
<th>May</th>
<th>June</th>
<th>July</th>
<th>August</th>
<th>September</th>
<th>October</th>
</tr>
</thead>
<tbody>
<tr>
<td>5/15 Birthday party</td>
<td>Testing period</td>
<td>7/24–7/30 Trip to London</td>
<td>9/6–9/10 visit younger brother</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Method

MY TIME AND ENERGY

The initiative is not the only thing you have going on. How can you divide your energy among the various areas of your life? Imagine your energy is a bottle and you have a number of glasses in front of you. You want to distribute your energy among the glasses.

- How much water do you want to pour into the “initiative” glass?
- How much water needs to be in the glass for education/school/studies?
- How much energy do you need for family and friends?
- What other glasses are there? (Health, exercise, hobbies, time for yourself…)

Draw your personal glasses and consider how you want to distribute the contents of the bottle.

Also consider whether or not your bottle is completely full at the moment. There are many situations in which you’ll only be operating at half-capacity, for example when it’s really hot outside…

Method

20% MORE

Is it impossible to foresee all the tasks and adjustments that will be necessary during implementation. Therefore, you should take into account buffer time – which should generally be about 20%. If you are aware of this, you will make more realistic plans.
Checklist
MANAGING YOUR OWN TIME

Everyday life & environment

AT WHAT TIME OF DAY DO I WORK BEST/WORST?
WHEN AM I PARTICULARLY AWAKE, WHEN AM I PARTICULARLY TIRED?

WHAT SURROUNDINGS HELP ME WORK EFFECTIVELY? WHAT DO I NEED TO BE ABLE TO CONCENTRATE? (LIGHTING CONDITIONS, NOISE LEVEL, WORK SPACE...)

WHAT IS MY “TYPICAL” ROUTINE LIKE? WHAT DO I NEED TO TAKE TIME FOR?
HOW OFTEN DO I DO “NOTHING AT ALL”?

Working process

HOW DO I START WHEN I HAVE TO GET SOMETHING DONE? (MAKE A LIST, SET PRIORITIES)

HOW AM I DISTRACTED?

HOW LONG AND HOW OFTEN DO I TAKE BREAKS?

HOW DO I REWARD MYSELF WHEN I GET SOMETHING DONE?

Your preferences

WHEN DO I BELIEVE WORK IS FINISHED?

HOW DO I USE MY FREE TIME?
**What a schedule looks like**

Whether you make plans in a parallel way or a linear one, you have to make a plan. Some people will update their schedules more frequently. Others will complete many new things at once. Still others only include the most important events “because everything is going to change anyway.” However, a plan will help anyone to:

- work on groups of tasks *in a clearer and simpler* way
- distribute responsibilities *fairly*
- work *efficiently*
- foresee possible *risks and problems*
- keep tabs on *successes*

This is a relatively simply example of a schedule. Some people will find the need to attach additional columns, some would rather work with mind maps than lists. We recommend orienting yourself on (a few) important basic parameters: your milestones (see the next page).

---

**Table: Schedule**

<table>
<thead>
<tr>
<th>Period:</th>
<th>Until...</th>
<th>What?</th>
<th>Related Tasks</th>
<th>Who is responsible?</th>
<th>Note</th>
</tr>
</thead>
</table>
| May     | Third week of May | Research  | • calculate finances  
• look for supporters 
• find a team 
• choose graffiti and artists  
• organize technical equipment | Zak, Elizabeth     | Andrea’s examination (till May 10)                                      |
| July    | July 2nd | Film script| • create a storyboard  
• make contact with residents | Romana, Benjamin    | Romana in England (24th to the 30th) |
| August  | 08/15/15 | Milestone: Completion preparatory work | • screen play ready  
• filming locations have been chosen  
• artists and residents have been selected | everyone             |                                            |
How to set milestones

Milestones are columns that were set at regular intervals along long roads in the past, usually one every mile. They showed travelers how far they had gone. Similarly, in planning an initiative, milestones mark the tasks that have to be completed on the way to the goal.

Milestones are formulated in the past tense. As points of orientation, they help schedule planning phases and important dates. Milestones describe the steps that have to be completed by a certain time. Not all the task steps are milestones – you shouldn’t set too many, just those that mark crucial moments. As much as possible, milestones should not be rescheduled – after all, you set them in order to help regulate your success.

### Table: Milestones

<table>
<thead>
<tr>
<th>Milestone</th>
<th>Description</th>
<th>Fulfilled conditions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Milestone 1</td>
<td>End of research: Basic concept has been formulated</td>
<td>• research on suitable artists and their work has been finished</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• the film's content and formal concept has been finalized</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• initial research on the neighborhood is finished and interview partners have been found</td>
</tr>
<tr>
<td>Milestone 2</td>
<td>End of adjustments: financing has been secured, end of preliminary work</td>
<td>• the community center has confirmed its support</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• the screenplay has been finished, the filming location has been prepared</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• artists and residents have been prepared for the interviews</td>
</tr>
<tr>
<td>Milestone 3</td>
<td>End of execution: end of the filming work</td>
<td>• exterior shots have been filmed</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• sufficient material for post-production has been gathered</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• the film crew has finished their work, technical equipment has been returned</td>
</tr>
<tr>
<td>Milestone 4</td>
<td>End of transitional period: final production</td>
<td>• material has been reviewed</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• the film has been cut</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• premiere has been organized</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• other performance dates have been agreed upon</td>
</tr>
</tbody>
</table>
STAYING MOTIVATED

Even if you have thought through the initiative by yourself and it is something that really interests you, your own motivation doesn’t remain constant. It comes in waves. At the beginning, your motivation is extremely high, but there can be times in which it decreases. In extreme cases, motivation can disappear completely. That is either the end of the initiative or you just don’t take part any more.

Recognizing Causes

You will often have motivational problems if you find yourself in a difficult situation. Alternatively, there may be something within the initiative or outside it that is so bothersome it distracts you from your work. For example:

- supporters and friends set other priorities
- new people join and want to give the initiative a different direction
- the world around us poses critical questions
- too much work
- no money
- difficulty making decisions

However, these difficulties only have certain influences on motivation. In the end, overcoming difficulties is something normal that you have to do on the way to reaching your goal. Once they’ve had success, some people are inspired to become bigger, better, and more ambitious.

What ensures that we don’t lose motivation, become passive, or give up? Motivational research assumes that two things must be in equilibrium: Your own

Info

MOTIVATING YOURSELF

A few tips for how you can support your own motivation:

Keeping the goal in mind

Your goals are important, the changes are positive for the environment

Rewards

Reward yourself after working hard and overcoming challenges

Celebrate success

Don’t take it for granted

Reinterpret failures

Use failures and setbacks as a chance to learn for the future

Join forces to generate power

Take encouragement from your team and circle of friends
**Method**

**HOW IT’S GOING TO BE**

Before you begin a new task, imagine how you will complete this task with joy and energy. Envision the future moment in which you have completed this task – how good and capable you’ll feel, and how proud you’ll be of yourself.

What exactly will you see?  
What will you hear?  
How will you feel?  
What will you say to yourself?  
What will others say to you?  

Perhaps you can find a certain image – real or imagined – or a song that connects with your feeling? You can use that if you fall into a slump: imagine it, look at it, listen to it – and thus simply imagine a good feeling…

**Info**

**THE LEARNING ZONE**

When we are experiencing something for the first time, we often ask ourselves the questions such as: Can I do this? Do I know enough? What should I do? This uncertainty is an indication of the fact that we are leaving our comfort zone and entering the learning zone.

So we know it can be good to be uncertain. If you feel panic, however, you should look for a healthy balance of uncertainties and control again: For instance, you could reduce or simplify some of your tasks.

abilities and personality traits have to correspond to the initiative’s challenges. In this sense, volunteer work is a learning process in which you are constantly confronted by these two spheres.

If the challenge is too great, you may become fearful and in extreme cases, you may feel hopeless. If you find yourself feeling fearful, consider taking a step back and perhaps foregoing one or two challenges.

If the challenge is too small, you may accomplish things too easily and you’ll end up feeling bored. If you notice that you yourself or a teammate is bored, you should consider seeking more challenging tasks or goals.

In the context of these two spheres, you can examine your own motivations or lack thereof. Are you bored? Nervous and tense? Ideally you should adapt your own goals or project plans in such a way that they fit your own needs.

However, at this juncture, it is also worth mentioning that learning usually comes with a little uncertainty. We don’t always understand everything one hundred percent. We do things without knowing where they are leading. We make decisions that don’t always seem smart in hindsight. That’s life. In order to learn you have to leave familiar knowledge behind. Upon entering into this learning zone different people react differently. Uncertainty and feeling doubtful aren’t negative in principle, they can also be a good sign that you are learning something.

You can maintain control of the situation if you regularly create space and time for self-observation. The following questions can help. They are oriented toward keeping the whole picture in mind and considering specific support possibilities:

• What motivates me to participate in this activity?  
• Which challenges push me to my limits?  
• Which people can inspire me to find new ways of doing things?  
• How can my team support me?
Changing perspectives and looking for other possibilities

It often helps to observe difficulties from a different perspective and to see what positive possibilities they hold. It often doesn’t help to observe your own difficult situation critically – what could you have done differently, what would have been better? These are questions for evaluating things afterward.

It is often more effective to focus on other ways out of the difficult situation. In every difficult situation, there is always something that you can learn, or a solution or new possibility that presents itself. You should pursue these suggestions by thinking positively.

There are no patent solutions here, because each person and each situation is unique. The two examples show how “rethinking” works in a practical way:

Example

I’M LEAVING!

Your best friend drops out of the team. You feel alone, your motivation is dropping. If you don’t indulge in your feelings, you’ll have the chance to see new possibilities.

The same goal, a different way to get there

Even without your friend, your goal remains the same, and objectively, the initiative is not threatened. However, a few things in your plan will change. Some tasks and responsibilities will have to be redistributed.

The team counts

Now you have the chance to concentrate on other team members and work with their abilities. After all, the team was never just you and your friend. Together, you and the other members of your team will find ways of reaching your goal. And lastly, when you spend time with your friend now, the two of you will talk about other things besides the initiative...

Example

NO MONEY

A bank wants to support your initiative. Shortly before it does so, you receive a friendly message: “Sorry, it’s not going to work out this time.”

Develop a Plan B

It is painful to have invested so much time into fundraising with this bank, but now you have to consider plan B:

• What is really important to me?
• What can we do without, if need be?

More clarity

In the long run, the idea often becomes clearer when you are forced to leave something out. More clarity, in turn, helps with new fundraising.

Info

PLAN B

Reducing complexity: Make it easier or smaller.

Delegation: Delegate tasks to other people.

Change: Modify the place, date, target group, or method, but still pursue the same main goal

Cancellation: Evaluate obstacles, draw conclusions

Additional Resources: Find additional resources, i.e. grants or volunteers
**THE LID ON THE POT: RISK MANAGEMENT**

Running out of motivation can be serious. Of course many other things can go wrong that cannot be prevented. But you can prepare for more serious failures by thinking on your own and with your team about how to *prevent* failures, what could go wrong, and *alternative modes of action*. What would happen if...

- not enough people register for the workshop?
- you need more money than you expected?
- team members occasionally drop out?

The method in the box below brings together these risks and helps develop ideas for prevention and alternatives.

---

**Method**

**EVALUATING RISKS**

On separate notes, write down what can’t happen for your plan to work. Treat the aspects of the initiative separately from one another – fundraising, teamwork, planning etc.

In the second step, try to evaluate how *probable* each is and *what impact* each would have on your success:

**improbable**

little effect

Then I won’t worry about it any more!

**probable**

medium impact

Develop a plan for that situation!

**probable**

great impact

Change your plan immediately!

---

**Method**

**PREVENTING PROBLEMS, DEVELOPING ALTERNATIVES**

Create a table of your risks that lists all the probable types of risk. *(⇒ Method “evaluating risks”)*. Fill out the chart for the aspects named here.

<table>
<thead>
<tr>
<th>Type of risk</th>
<th>What could go wrong?</th>
<th>How can you prevent it?</th>
<th>Which measures can you take if it does go wrong?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Teamwork</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Fundraising</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Target groups/participants</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>PR</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>...</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
SELF-EVALUATION

Often the prospect of learning something important strengthens your own motivation: Try out something that you always wanted to do! Something that is your own responsibility, that you can do in your own style, at your own speed!

Being able to plan things well is not easy. On the contrary, it is very complex, although you usually get better at it the more you practice. When you first start working for social causes, you should not expect that everything will work just the way you imagined it.

To analyze and evaluate your situation, you need reference points, criteria by which to measure it. Success is only measured by the goals you have set for yourself. You formulate initial goals fairly early on in the course of the initiative, when it is often not yet completely clear how things are going to develop. Imagining your satisfaction with a result is not always easy at this time. However, when the initial excitement has subsided and you know and understand more, this is exactly what you should do, as well as renew your commitment to your own goals.

Carefully examining your own goals and ways of working falls under the category of self-evaluation. In addition to self-evaluation, there is also evaluation by others (such as experts or participants).

Essentially, self-evaluation means regularly examining and adjusting your own actions. Through this constant monitoring, the quality of the initiative also improves. After all, you are not simply stubbornly working on a plan or reacting to external influences. You see changes coming and you can adjust the plan accordingly. No project and no planning ever proceeds exactly the way you thought it would at the beginning...

Example: Self-Evaluation

**STREET ART FILM**

If your first basic goal was to do something related to street art, in the meantime you have decided...

<table>
<thead>
<tr>
<th>You would like...</th>
<th>to make a short film.</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>to give graffiti artists the opportunity to talk about their work.</td>
</tr>
<tr>
<td></td>
<td>residents to talk about their opinions on graffiti.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Different people have helped change the project’s goals:</th>
</tr>
</thead>
<tbody>
<tr>
<td>One of your team members has experience with film.</td>
</tr>
<tr>
<td>You have made contact with a graffiti artist.</td>
</tr>
<tr>
<td>You have heard many negative opinions on street art.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>It would be a success if...</th>
<th>Residents and graffiti artists come together for a discussion.</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>at least 30 people see the film.</td>
</tr>
<tr>
<td></td>
<td>The film doesn’t just record graffiti, but also employs a “street art style.”</td>
</tr>
</tbody>
</table>
Checklist
SAM – REFLECT ON GOALS

⇔ Remember: SMART goals, page 15

SPECIFIC

HOW HAVE THE GOALS CHANGED? WHAT HAS HELPED FOCUS THEM?

NOW I WOULD LIKE

ACCEPTABLE

WHAT INFLUENCE DO MY TEAM OR MY PARTNERS EXERT ON THE GOALS?

THESE PEOPLE HAVE CHANGED
THE GOALS IN THE FOLLOWING WAYS:

I AGREE WITH THESE CHANGES:

I DON’T AGREE WITH THESE:

MEASURABLE

WHEN AM I SATISFIED? WHAT DOES SUCCESS MEAN FOR ME IN THIS SITUATION?
WHAT WOULD BE A FAILURE?

IT WOULD BE A SUCCESS IF:
**ANALYSIS: LEARNING FOR NEXT TIME**

A mistake is not a problem. What is crucial is that you try to understand why you made a mistake – the fact of the mistake itself is incidental. *Self-evaluation* helps as much as *exchange with others*. Both should be integrated into your process by allowing time for *regular analysis*.

This can happen once a week or once a month, but at least after every milestone. It’s best if it happens regularly, rather than only when things aren’t going the way they should.

You can do this alone in a comfortable place or with your team. Self-evaluation does not mean just concentrating on "mistakes," but rather learning something about yourself – your strengths and newly discovered or gained abilities are part of that too.

---

**Method**

**INITIATIVE DIARY**

An empty booklet can serve for personal documentation. Here, you note all the thoughts and realizations you have had over the course of your initiative. You can draw or paste in pictures, use symbols for certain tasks, ideas, or feelings… imagination knows no boundaries!

At the end, a diary like this helps you with evaluating and identifying important points and topics. In addition, it records your important realizations for later.

---

**Method**

**CRITIQUE FOR THE FUTURE**

In order to evaluate a specific step in work or a certain action, take notes on multi-color pieces of paper under the headings "positive," "negative," and "other."

This method is also apt for team evaluations. First, everyone writes their notes individually, and afterwards the answers are collected, presented, and discussed. At the end, the team can agree on how certain things should work in the future.

---

**Method**

**DOODLE CRITIQUE**

After you finish a step in your work or a certain action, take a white sheet paper and draw what comes to mind. The goal is to switch off your intellectual mind and your language centers, and pay more attention to feelings. You can

- draw places and people
- use colors or symbols
- represent the connections among different people or activities
- show importance with size

This method is also good to use in your team. Be sure to allow sufficient time to discuss the drawings.
Checklist

QUESTIONS FOR SELF-EVALUATION

• DESCRIBE YOUR OWN BEHAVIOR, DO NOT EVALUATE IT
• BE SPECIFIC
• BE HONEST, THE ANSWERS ARE ONLY INTENDED FOR YOU

In reference to your individual work:

HOW SATISFIED AM I WITH MY RESULTS?

WHAT WAS THE PLAN?

HOW DID THINGS ACTUALLY PROCEED?

HOW DID I REACT?

HOW DID OTHERS SEE IT?

WHAT DID I LEARN?

HOW WOULD I DO IT NEXT TIME?

In reference to myself:

WHICH TASKS DID I TAKE ON AND COMPLETE?

WHAT DID I DO WELL? WHERE WAS I UNSUCCESSFUL?

WHAT HELPED ME? WHAT HELD ME BACK FROM COMPLETING MY TASKS?

IN WHICH SITUATIONS DID I FEEL GOOD? IN WHICH DID I FEEL UNCOMFORTABLE?

HOW DO I BEHAVE IN PLEASANT SITUATIONS? IN DIFFICULT ONES?

HOW DO OTHER PEOPLE PERCEIVE ME IN THIS SITUATION?

WHAT KNOWLEDGE AND ABILITIES HELPED ME DO THIS WORK?

WHAT NEW KNOWLEDGE AND ABILITIES DID I ACQUIRE?
TEAM
WHO’S GOING TO HELP COOK?

“Too many cooks spoil the broth,” as the saying goes. That may be true if it’s a soup you’re working on rather than an action. But like a big meal, many initiatives consist of more than one course. So you’ll need many heads and hands in the kitchen to create a well balanced meal...

If you consider the proverb about soup more carefully, you might ask yourself: Is the problem due to the size of the team or the kind of communication, the task distribution, the work culture, or the way people work together? What is important for a team to be successful?

Not every group of people deserves to be called a “team.” A team doesn’t develop automatically, but through constructive, respectful attitudes toward one another and by sharing a common goal. All of these things require time, energy, and patience: There are no miracles. A well functioning team is the result of hard work. There are different steps in before a group truly becomes a team:

| +4 Excellent team | All team members understand the various individual and group goals at play. They implement their abilities and resources in an optimal way in order to reach these goals and are in constant exchange with regard to them. |
| +3 Team | The team’s tasks are distributed in such a way that suits each person’s personality and abilities best. Decisions are made together. |
| +2 Community | Goals and values are developed together. Each person is taken seriously. Individual needs and goals are discussed together. The team also discusses when the goals are to be met, and in which way. |
| +1 Group | One or two people provide goals for the group. |
| 0 Meeting | People are not synchronized. Team members have different ideas. Goals, group goals, and agreements are very unclear. |
| -1 Wild mob | The group consists of solitary players. Agreements are not made or are not kept. Each person’s own goals are fulfilled at the expense of others. |

Source: Friebe, Jörg: Reflexion im Training, Bonn 2012, S. 90
WORKING IN DIVERSE TEAMS

In a team, you are working with different kinds of people who have various convictions and talents. Whether or not you make use of this diversity as a way to enrich the project is a question of sensitivity and personal attitude.

Generally, the rule is that you should see team members as individuals with unique qualities. You shouldn’t define them as part of a certain social group and assign them roles accordingly: “You’re a student, so you can do the talking!” or “You’re the oldest, so you decide how we do it!” Instead, as a team, it is your task to discuss personal and collective goals; to exchange ideas about how each individual imagines the work that lies ahead; what obstacles might prevent you from being ready and able to work, etc. It is imperative to be open to the ideas, dreams, and needs of each team member. The more you grapple with one another’s goals in this way, the better your chances of experiencing variety in your team as a positive quality and not something to combat.

FIRST CLARIFY VALUES AND GOALS

Do you prefer to cook vegetarian meals or steak? Do you follow the recipe closely or do you improvise? Is it about making a four-star meal, or is it just about filling your stomach? Do the individual team members share common values and goals, do they have the same sources of motivation? Do they have comparable expectations?

These fundamental questions should arise at the outset of every collaboration. However, teams often do not discuss these issues because everyone assumes that all the team members share the same values, and that they are all pursuing the same goals. In most cases, however, that is not the case. Team members often don’t realize this until there are misunderstandings or conflicts.

Therefore, having an in-depth discussion about the initiative is important, both in an overall sense as well as about specific aspects of teamwork. Many expectations may be very similar, others may be completely different. The earlier on in the process team members discuss these issues, the better everyone will know where they stand and the easier it will be to plan a work scenario and guidelines together.

Method
TEAM-O-METER

Make sure all the team members are familiar with the table from the previous page.

Draw your own team-o-meter

Each person takes a sheet of paper. Team members draw their own thermometers, assigning the team a place on the scale where they see fit.

Exchange

People’s perceptions are often different. Discuss this in the team.

• What are the causes of these differences?
• How do the (theoretical) wishes for your work as a team compare to your actual behavior?

Example

You see your team as a community. But how are decisions actually made? Is there one person who always says what needs to be done next?

Variation

In order to track a team’s development, you can repeat this method over the course of a collaboration.
Method
CONCEPT CHECK

Answer the following questions about the initiative’s concept honestly and, at first, individually.

Afterward, your team should get together as a group to exchange thoughts. Try to locate differences and similarities among yourselves.

You may have many of these answers already. This activity is about updating your goals and expectations and then using them to exchange within the team.

Motivation and personal expectations
Why am I interested in this initiative on a social and personal level?

Project goals & educational goals
Which is the most important change that I want to make through this initiative? What do I want to learn?

Values
What values do I associate with the initiative? Which values should the team represent?

Expectations for the team
How do I imagine the work in the team concretely? How can I support my team and how can my team support me? How should we communicate with each other?

Example
GERMAN CLUB

Reminder (p.13): In order to improve your German, you organize German-language afternoons that consist of conversation with exchange students and films in the original language. Where might conflicts crop up here?

You want…
… most of all to discuss things.
… to overcome your shyness about speaking publicly.
… harmony in the team.

Another team member wants…
… to create a film club.
… to try out leadership abilities.
… to work productively and effectively.

As the example shows, the same initiative can be perceived very differently by different team members. The kinds of emphasis different people place can be very different.

Teamwork isn’t about convincing one another of your own goals and expectations; there is no right and wrong here. But it’s important to create a strategy together that fulfills everyone’s wishes. In this way, the discussion itself is often the goal.
WHO DOES WHAT: ROLES IN THE TEAM

If you invite people to cook with you, you don’t always know who can cook, who is a talented dessert maker, and who would rather set the table. A good team has to get to know one another first, then you can use your particular arrangement of strengths and weaknesses in your favor. It doesn’t mean that everyone has to be able to do everything just as well as everyone else. A strong team is made stronger by its characters, talents, and motivations. In order to complement one another, it is good to be aware of your own tendencies, what you think the initiative wants to continue working on, and what you can learn from other team members.

There are many different roles in teams, as the following overview makes clear. When reading over it, you can consider what role would be suitable for yourself. It is often the case that you could play many different roles.

You are more than just your role

Even if a role corresponds with many of your own personality traits, it is still just a role. In other words, people’s roles don’t encompass everything about them. Therefore, you can also take on the challenge of playing a different role than the one that would be the most comfortable for you. You might even discover completely new qualities about yourself – the privilege of choosing our own roles is part of the beauty of volunteer initiatives.

Playing multiple roles

In smaller teams, a person can take on multiple roles, while in larger teams, many people share a task that is connected with one role. It is good to have multiple roles in a team because the work demands different roles. Knowing how you tick and that your work is going well ensures more understanding for and from other team members.

Info

ROLES IN THE TEAM

The Plant

contributes new and innovative ideas and has the ability to solve difficult problems. However, the person can often be lost in thought and too preoccupied with ideas to communicate effectively.

The Resource Investigator

is communicative and enthusiastic, establishes contact easily, and usually has a “plan B” in mind. However, he or she often loses motivation after the initial euphoric phase is over.

The Co-ordinator

brings different people in the team together. Such a person is skilled at setting goals, delegating tasks, and making decisions. She or he can also come across as manipulative and unload too much work on other people in the team.

The Shaper

can be well under pressure and has plenty of energy and courage to withstand obstacles. The shaper can be provocative, however, and can sometimes hurt others’ feelings.

The Monitor Evaluator

is levelheaded, critical, and thinks strategically – and because the person factors in all considerations, he or she is a fair judge. Inspiration and motivation seldom come from monitor evaluators.
The Teamworker  
is cooperative, diplomatic, takes others’ feelings into account and holds the team together. In crisis situations, however, teamworkers can be indecisive.

The Implementer  
finishes the tasks in a disciplined and efficient way; you can rely on this person. Actions correspond to the words, but implementers are somewhat inflexible and not always open to new ideas.

The Completer Finisher  
works carefully and conscientiously, finds the smallest errors, and is punctual. He or she tends to rack his brain about every detail, and cannot delegate tasks to others.

The Specialist  
is purposeful and engaged, she or he supplies specialized knowledge and information, but specialists quickly lose themselves in the details.

Team model according to M. Belbin

Method  
MY ROLE(S) IN THE TEAM  
Which of the roles do you play in the team? Discuss these questions as a group:

• To which descriptions of roles do you respond most positively? Which ones give you the biggest stomachache? Why?
• How do others appraise you?
• What roles could you partially undertake, or with support?
• With which roles do you have experience already?
• Which roles do you assume most frequently?

BASIS OF COLLABORATION  
In most cases, misunderstandings or unfulfilled expectations lead to conflicts.
What you expect from yourself or others is connected to cultural background, education, and habits. In teams, these include such aspects as: Do you seek or avoid discussions? Do you prefer to work alone or with a partner? What is your relationship to hierarchies and rules? It is important to know and understand your own individual work culture, and what expectations you have for the other people in the team because of that culture.

Approaches to groups

I make my decisions with consideration for the group.  
I make decisions by myself.  
I enjoy harmony. I prefer to avoid confrontations and arguments because I don’t want to hurt anyone. Everyone should be able to “save face.”  
I find confrontations, analysis, and open team discussions positive and useful. One should be able to take criticism.  
To me, teamwork involves people working together to make decisions, divide up tasks, and overcome obstacles.  
For me, a team is a group of individuals. People should have their own tasks and skills, otherwise they will just quarrel.
Approaches to hierarchies

It’s good for someone to determine what direction the project is going in, what tasks I should take on, e.g. the “founder” of the initiative.

I find it important that people decide for themselves what tasks they would like to take on and how to complete them.

In my opinion, criticism should only be expressed by those who bear responsibility and make decisions.

All team members should always be able to express their opinions.

If there is a conflict in the team, I expect that the director of the team will find a solution.

In my opinion, when conflicts occur in the team, the people who are directly involved should find a solution.

Approaches to rules

I think that long discussions only lead to disruption. Planning is not very important.

I feel good when there is a lot of discussion in team meetings. I plan as much as possible to be prepared for all the possible dangers.

I find abilities to improvise enormously important. Ultimately, you have to adjust the initiative to current changes anyway. That’s what makes the work exciting.

I always like to have a plan B. If things don’t go as planned, I feel frustrated and uncertain.

I find that numbers and fixed points in the plan exert a certain pressure.

Numbers and fixed points in the plan give me a sense of security.

Every person is different

There probably isn’t anyone in the world who is always 100% on one side of an issue. Your work culture is unique, and is always a mixture or an “in between.” Sometimes the work culture varies with the type of task at hand. Therefore it is important to discuss things in a team. The more differences you have with someone, the more potential for conflict the team will have. This knowledge can be constructively converted into a collection of collaboration:

Checklist: Teamwork
Checklist

TEAMWORK

After you have individually considered why the initiative is personally important to you and motivates you, discuss the following questions in your team:

WHO HAS WHICH RESPONSIBILITIES? IS THERE A LEADER OR IS EVERYONE EQUAL?

HOW DO WE WANT TO PREPARE FOR THE INITIATIVE?
SHOULD WE MAKE A SCHEDULE FIRST? HOW WILL WE DEAL WITH DEADLINES?
HOW MUCH POSTPONEMENT IS ACCEPTABLE?

HOW WILL WE DEAL WITH CRITICISM? ARE ANALYSIS AND CRITICISM MORE IMPORTANT THAN AN ATMOSPHERE OF HARMONIOUS DISCUSSION? WHO MAY CRITICIZE WHOM?
WHAT DOES OUR TEAM DEFINE A “GOOD DISCUSSION”?

SHOULD WE DIVIDE OUR WORK INTO DIFFERENT SETS OF TASKS THAT CAN THEN BE ACCOMPLISHED INDIVIDUALLY, OR SHOULD WE WORK ON THE INDIVIDUAL PROJECT STEPS AS A GROUP? DO WE SEE OUR TASKS AS INDIVIDUAL ACHIEVEMENTS OR AS GROUP ACHIEVEMENTS?

WHAT IS MORE IMPORTANT: ADHERENCE TO THE RULES OR OUR PERSONAL RELATIONSHIPS?

WHAT NEEDS TO BE PUT DOWN IN WRITING? WHERE ARE WE FLEXIBLE?

WHAT SHOULD WE DO IF A CONFLICT ARISES? WHICH BEHAVIORS ARE (NOT) DESIRABLE?
COMMUNICATION AMONG TEAM MEMBERS

Communication is about more than which languages you speak, it is also about how you speak: what word choices you make, what you say in which situation and with which (un)conscious intentions. Communication expert Paul Watzlawick once said, “You cannot not communicate,” which means that you’re always sending signals with your body language, with (non) behavior, and even with your style of clothing. Of course some of those signals aren’t always understood the way you intend them – that’s when misunderstandings occur. Two questions are crucial in this respect:

• What is my communication style?
• How important are my relationships with other team members?

Four different subtexts in one message

Communication psychologist Friedemann Schulz von Thun believes that each message, whether verbal or nonverbal, has four levels of meaning. They are deeply woven into things you say or hear, so it can be very difficult to be sure that your counterpart hears the meaning you intended in the message you expressed. Understanding means being able to “break down” the message correctly into its components of the factual level, appeal level, self-revelation level, and relationship level:

The model shows there is no one way of decoding messages. Every message has to be observed individually because the people involved, their relationships to one another, their moods, the situation, and the setting all play important roles. The same sentence spoken by a different person in another situation can mean something completely different.

Many people believe that they predominantly communicate factually, and attribute too large a role to this level: “If I formulate my concerns as accurately as possible, everyone will understand me correctly.”

When you communicate with other people, you’re automatically taking a position in response to them. This can often be recognized in non-verbal behavior: uncertainty, speaking nervously or too quickly, tense posture, not making eye contact…

Example

YOU'RE FINALLY HERE!

Imagine that you have a meeting with a colleague who wants to show you his newest poster design. You’ve been waiting for him for 30 minutes in a café, you’ve called but his cell phone is off… When he arrives, you react by saying: “You’re finally here!” The four subtexts to a message can be found in this sentence and can mean completely different things:

Factual level

“You’re here now.”

Appeal level

“Be punctual!” or “Let me know if you’re going to be late!” or “Please apologize!”

Self-expression level

“I’m annoyed,” or “I feel I’ve been treated disrespectfully,” or “I’m glad that nothing happened to you, I was starting to get worried.”

Relationship level

“You don’t respect my time,” or “You’re late again!” or “I’m glad to see you.”
Nonverbal signals

Observing your own non-verbal communication and that of others often reveals more than what is “actually” said. If the team is trusting, you can share your observations with one another.

Sometimes misunderstandings happen because some people communicate directly, while others communicate indirectly. The latter try to “package” negative messages or critical statements in a nice way so that no one feels affronted – their goal is harmony. People who communicate directly hear something as “constructive criticism” that others would take personally.

Active listening

When you are communicating, you have to listen much more than you speak. Hearing and listening are obviously not the same thing, and it’s worth learning to listen properly.

If you look in the mirror, you see your own face reflected – you see yourself but the mirror image is not identical to you. Similarly, when you engage in active listening, try to repeat what you have heard back in your own words, to show the speaker what you understood and whether it is correct. At its heart, active listening also helps you understand the other person’s perspective fully and completely. This doesn’t necessarily mean taking on the other person’s perspective yourself.

If you want to communicate to the other person that you’ve really listened and concentrated on the discussion, there are a few rules for behavior:

Reflecting
“This is what I heard you say.” From time to time you can repeat what you heard in your own words.

Asking questions
“What do you mean by that? What does this word/issue/phrase mean to you...?” You ask whether you summarized correctly and discuss in more detail anything that might be unclear. You explain any vague and ambiguous terms.

Confirmation signals
Nodding your head, saying “yeah” or “yes” can serve as good verbal confirmations to show that you’ve really listened. You can communicate this with facial expressions as well.
Constructive criticism and feedback

Now you’re done listening and understand what you’ve heard from the other person. But how can you give constructive feedback on what you’ve heard? How can you express your opinion within your team so that it is also acceptable and contributes to a solution when conflicts arise?

Constructive criticism means remaining purely on the factual level, while also, making suggestions for solutions. Along with conflicts such as “I don’t like that flyer!”; “I would rather invite this woman as an expert, not that man!” – personal issues can also be discussed through the lens of constructive criticism. In this way, feedback in the team can become very important for your own development.

Giving and accepting constructive feedback is the best quality of any work in a team! At the same time, things can go wrong and damage good relationships. Feedback is a very important issue, but is as delicate as a flower, and not many people dare to get involved. But it’s worth it!

Method

CONSTRUCTIVE FEEDBACK

When giving feedback

- Only speak if you have something important and helpful to say
- Speak for yourself: Use “I” instead of “we” or “everyone”
- Separate feelings from observations
- Describe instead of interpreting
- Comment on what was said and the behavior, not the person
- Keep in mind from which perspective you’re giving feedback

When receiving feedback

- Ask if you don’t understand something
- Don’t discuss and comment on what was said
- Feedback is a gift: you don’t have to accept it (completely)
- However, you should say thank you for each constructive gift

Info

FEEDBACK PROCESS

1. Positive aspects
   - This is what I like about your/the situation...
   - You’ve found a good solution...
   - That’s a good idea...

2.a. Your own observations and impressions
   - I saw it this way....
   - My impression was that...

   or

2.b. Suggestions
   - Next time you could....
   - For the future, I would like...

3. Positive ending
   - I trust you
   - I’m sure that you can do it/we can do it together.
CONFLICT RESOLUTION

Anyone who has ever started an initiative and worked in a team agrees that tips for how best to manage conflicts are very important. Many people hope to find miracle methods with miracle solutions. In so doing, they forget that conflict management begins before the conflict crops up. What does that kind of management look like? As was previously mentioned: it involves attentive togetherness, discussions about work cultures, and tasks being distributed in such a way that everyone is satisfied, etc. The more this happens, the less likely it is that actual conflicts will occur.

But if a conflict does occur… Conflicts often have different causes – it’s a little like the model showing the four parts of a message on page 48. Just as there is no universal way to decipher a message, each conflict is also “unique.” Nevertheless, conflict research describes five universal causes for conflicts. They often overlap, but in terms of analyzing the conflict, taking a closer look can be very helpful.

### Relationship conflict

“I’ve explained thousands of times how I want it – but this person never listens to me!”

- Admit to and express your feelings, make your own perceptions clear and explain them
- Consider how you might improve communication

### Information conflict

“Why did you make the poster? I thought I was supposed to do it!”

- Talk about where you got your information – it might be good to consult a third party
- Discuss task distribution again

### Conflict of interests

“What was that person thinking? I have a good grades in art and I’ve already made the flyer... I’m just going to ignore that comment!”

- Clarify the interests that lie behind the conflict – what do you want to achieve?
- Avoid competition by assigning tasks more clearly or using them consciously, e.g. have a selection.

---

**Example**

**DESTRUCTIVE VS. CONSTRUCTIVE**

You and your team have decided to organize a German language meet-up in your city. A team member has spent the whole night working on the information poster and presents it to you proudly. But you have a few points to make...

“Well it’s FINALLY finished! Pretty colorful, isn’t it? It almost hurts your eyes… And you don’t really know how to use fonts in the right way, it’s a pretty crazy combination… I think you’ll have to make a new one!”

“Cool that you got it done in such a short time! Now I see why I had to wait. I like the images you chose and the text – just right for the poster. But all the colors make it a little hard to see the poster as a whole. I also find so many different font styles to be a little much, maybe it would be clearer with only two. Basically, most of the work is done, it just has to be reduced a little. Let me know if you need help...
Structural conflict

“I missed one team meeting and wasn’t able to check email for a few days – and I got kicked out!”

- Change structures and make resources available
- Reflect on your own behavior – how and when can you make a decision with your team? How do you deal with a team member not being there?

Conflict in values

“How can he say such a sexist thing!”

- Accept that such conflicts can’t always be solved
- Give yourselves permission to disagree
- Continue to work toward shared goals
- Explain differences in values and give examples in order to enable better mutual understanding

In these examples it sounds as if one person has a problem with the other. In actuality, the situation is often more complicated because each person is part of the conflict, and may even be contributing to it deliberately. It may also be more complicated if more than two people are involved in the conflict.

ON THE INSIDE

Conflicts are all unique, but nevertheless we often assume that there is only one path to a solution. In fact there are usually different possibilities.

- Who am I disagreeing with?
- In which situations and settings do I get into arguments?
- How do I usually deal with conflicts?

Not every conflict situation has to end in a debate, sometimes the best thing is a “steering clear” strategy – one in which you remove yourself from the situation. The situation sometimes calms down of its own accord; some things are easier to talk about after a little time has passed. This decision should be made consciously and should not simply serve as a way to escape an argument. When it comes to compromises, try not to come up with one just because a solution doesn’t present itself immediately. Constant “meeting in the middle” can leave you dissatisfied over the long term.

Info

MAKING DECISIONS

There are several ways to make acceptable decisions. In the four steps of making democratic decisions, the compromise itself actually comes third:

- Clarify whether a conflict is actually present
- Change the situation as a creative solution
- Find a compromise – this step should place equal limitations on all the people involved
- Majority vote

These four steps are the basis for the Betzavta method, developed by the Adam Institute for Democracy and Peace in Jerusalem. You can find out more at: www.adaminstitute.org.il

Method

GIVING AND RECEIVING

All those participating in a conflict write down what he/she would like to have and what he/she can offer on their own sheets of paper: What do you expect from others, what are you yourself able to give?

Afterward, discuss these offerings and requests together and use them to take small steps toward a solution.
UPS AND DOWNS IN THE TEAM

On the previous pages, we described many methods and guiding questions to help facilitate teamwork. But even if you take all of these points into consideration, relationships in a team still have their ups and downs, much like a roller coaster. The difference is that no team member asked to take a plunge.

Forming

Anticipation and skepticism, creativity, policy discussions, high expectations, and general uncertainty – in this phase there are many contradictory feelings. It’s worth it to take some time to determine shared goals and tasks, and to clarify roles and communication guidelines.

Storming

The group “starts running” and obstacles in planning and conflicts in the team quickly crop up. The surroundings may also challenge the other team members: Exams, vacation travel, love relationships all demand time…

Norming

After conflicts have been dealt with and defused, they are usually followed by a period of relaxation. The shared goals and experiences take center stage, identification with common bonds increases.

Performing

The working intensity is high. You try to keep tabs on the process through good management. The team members respect one another and enjoy the feeling of working together.

Adjourning

At the end you take stock, but also celebrate. The group disbands, and this is often an emotional process. New plans are forged.
Evaluation

The project should be evaluated not only at the end, but also occasionally throughout its duration. For example, when someone stops working on the project or asks for new tasks. This (new) uncertainty is then followed by an evaluation phase.

Such dynamic elements are part of working in a team; they are normal and no reason to panic. In each phase, the team members have different needs and expectations for one another. It is important, however, that you regulate the extent to which such dynamics determine the process itself or even obstruct it. Being familiar with the stages of group development helps you become aware of your own feelings and needs, and prevents potential conflicts.

AND IN THE END: HAVE FUN!

You can’t just cook – eating, drinking, and talking together about everyday life are all important too. You take on initiatives like these because you want to change something by working with like-minded people. Many teams underestimate the meaning of time spent together. The better you know someone else, the better you understand yourself. And then conflicts and stress are even less likely to arise…
Checklist

TEAM ROLLER COASTER

Forming - storming - norming - performing - adjourning. Which phase is your team in right now? Think about the questions and discuss as a team:

1. WHICH FACTORS, WHICH SPECIFIC BEHAVIORS, WHICH SITUATIONS MADE YOU CHOOSE THIS PHASE?

2. WHAT DO YOU FEEL RIGHT NOW IN REGARD TO THE INITIATIVE AND THE COLLABORATION?

3. EVERY FEELING COMES FROM A FULFILLED OR UNFULFILLED EXPECTATION. WHAT DO YOU EXPECT IN REGARD TO THE INITIATIVE AND THE COLLABORATION?

4. WHAT HAS TO HAPPEN IN ORDER FOR YOUR EXPECTATIONS TO BE ACKNOWLEDGED AND FULFILLED?
TARGET GROUP
WHO’S COMING TO DINNER?

You’ve cooked up a quick spaghetti Bolognese...and your guests are vegetarian. Mistakes like these can prevent some people from feeling welcome and enjoying the evening. Initiatives should include everybody, but all too often, certain groups are excluded. How can you design your initiative to make it as inclusive as possible?

The freedom to actively determine one’s own experience is a human right. The Universal Declaration of Human Rights and other UN conventions are meant to prevent discrimination in the workplace or educational institutions; they insist on every person’s right to free information, health care, and the “right to active participation in the life of the community (Convention on the Rights of the Child, Article 23).” In theory, then, everything is clear.

What does this mean in practice for a civic initiative, however? What do a garbage clean-up or a student play have to do with the right to participate? At the heart of the issue is your initiative’s audience, which actors and groups you will be addressing and inviting to participate: in other words, your target group.

TARGET GROUP ANALYSIS

A target group includes anyone your initiative intends to reach in any way. Often this may include several target groups, each of which may have very different needs. The choice of an event’s format can be crucial in determining the target group. For example, a hip-hop concert will probably attract a younger crowd. The question as to whether a public or private target group is intended is also an important consideration.

Example

EUROPEAN FESTIVAL

“We are planning a European festival in order to find out what people think about the European Union.”

The target group in this case includes all of the people living in the city, and is clearly public.

Example

WOMEN’S WORKSHOP

“In our workshop we would like to strengthen relationships and communication between older and younger women.”

The target groups in this case are older and younger women, perhaps mothers and daughters: a clearly defined, closed group.
Method

EMPATHY MAP

Create a map similar to the one below for your initiative in order to find out more about the people with whom you'll be working. These questions will help you listen, empathize, and make careful observations.

THINKING AND FEELING

Hopes/Concerns

1. What is important to the people I’m working with?
2. What are their hopes and dreams?
3. What moves them?

Listening

Influences/Media

1. What influence does the environment exert?
2. Who are people influenced by?
3. Which media are relevant?

Framing and Doing

External World/Social Interaction

1. What do other people say about them?
2. How do they behave?
3. What are their hobbies?

Seeing

Environment/Family

1. What does the environment look like?
2. Who are allies of the initiative?
3. What opportunities do people have?

Hopes

Desires/Goals

1. What do people want to achieve?
2. How do they measure success?
3. How can they reach their goals?
4. What do they need in order to participate?

Frustrations

Fears/Obstacles

1. What frustrates people in the target group?
2. What hurdles do they have to overcome?
3. What risks are they taking?
4. What prevents them from participating?

From: Dave Gray/XPLANE
IDENTIFYING TARGET GROUPS AND STAKEHOLDERS

You can determine a list of potential individuals who may provide important support based on the “target groups” checklist on page 18. Now it is time to choose a few with whom to work more closely, sorting the most important target groups or supporters into two or three groups.

A target group implies a set of specific needs, but also various resources. In order to better adjust your ideas to the people involved and encourage active participation, it is helpful to create a detailed analysis. The next step is to consider the way in which your initiative will depend on each respective target group.

Info
HOW CAN THE TARGET GROUP SUPPORT THE INITIATIVE?

People can support or collaborate in many different ways, for example:

- they can work on the project team
- donate money, time, or make in-kind donations
- speak with other people about the initiative and its goals
- recruit other participants
- sign petitions
- get informed about an issue
- take part in an event or a seminar
- listen, watch, or consume.
What opportunities do target individuals have to participate?

Based on the description of support your initiative will need, you can now determine the ways in which the target group can realistically take part. In doing so, you should differentiate between consumption, information, cooperation, and participation.

On the spectrum ranging from active to passive participation, consumption does not require much from participants, nor does it provide many opportunities for them to influence the initiative’s process. Collaboration on equal footing lies at the other end of the spectrum. If you would like participants truly to collaborate on an initiative, a great deal of time, interest, and discipline is required. This is similar to the way a country or a company is run as well. The ambitious nature of projects that choose true collaboration often requires that the people involved set aside their own needs for efficiency, speed, and clarity. However, collaboration can also generate greater agreement, support, and contact among the people involved. In this way, such projects are a microcosm of democratic ideals.

Volunteer initiatives always face some type of limitation. Therefore, it isn’t a betrayal of your ideals if you strike a balance between the practical benefits of participation and its more idealistic values:

- Which form of participation will be most effective in achieving your goals?
- Which form of participation will help to increase awareness of the initiative?
- Which form of participation most accurately represents the values of the team?

Increasing the quality of participation

ACTING TOGETHER

MAKING DECISIONS TOGETHER

HAVING DISCUSSIONS

GETTING INFORMED

CONSUMING

Info

PROVIDING OPPORTUNITIES FOR PARTICIPATION

In the current discussion on participation, we often talk about people with “limited opportunities.” Exclusion from participation or a lack of opportunities to participate in projects can result from the following situations:

Disabilities

mental or physical handicaps

Health problems

chronic illnesses

Education-related difficulties

low level of education, learning difficulties, dropping out of school...

Cultural differences

immigrants or refugees, ethnic minorities...

Economic obstacles

low standards of living, unemployment

Social obstacles

gender, religion, sexual orientation

Geographical obstacles

rural areas or regions with weak infrastructure, social crises...

Source: Erasmus+, strategies for inclusion and diversity, April 2015
Example

Street Fair for Children

You are designing a carnival with friends. The event will include various activities to choose from: ball games, hopscotch, karaoke, and a make-up booth. It is a well thought out plan, and even has the support of the city’s mayor. Many children might attend – but some won’t. Who are they?

The obstacles detailed at left show how you can unintentionally exclude people in your planning.

Barriers to participation

The point is not to make every initiative available to every conceivable group. Nonetheless, you should think carefully about who might be excluded, even for purely practical reasons.

But why should you worry so much if you’re sure enough children will attend your event? Fairness alone should be reason enough. Another reason is to provide encouragement to children who are often excluded. Yet another reason might be a desire to showcase existing diversity and share your ideas as widely as possible, thereby giving them greater influence.

Additionally, new ideas and solutions can emerge when different people come together. Some participants may have ideas or suggestions that would not occur to you.

Three words ending in “ion”

There are three different meanings for the word “involvement.”

Inclusion frequently describes accommodating people with handicaps, but can also carry a broader meaning. According to inclusive thinking, every person is “normal,” and society must be organized such that every individual is able to share their unique abilities.

Participation usually refers to politics or decision-making processes. The citizens of a society are included in decisions that concern them, and they find common solutions for “public” questions.

Representation describes whether and to what extent people and social groups narrate their own history – as opposed to others telling it for or about them.

▶ Checklist: Inclusion, participation, representation
Checklist

INCLUSION, PARTICIPATION, REPRESENTATION

Inclusion

WHEN I THINK ABOUT MY EVENT AND THE PRACTICAL HURDLES THAT MAY PREVENT PEOPLE FROM TAKING PART, WHICH PEOPLE OR GROUPS HAVE LESS ACCESS TO SUCH AN INITIATIVE?

HOW CAN I MAKE MY INITIATIVE MORE ACCESSIBLE?

Participation

AT WHICH POINTS DO PARTICIPANTS HAVE AN OPPORTUNITY TO DETERMINE HOW A PROJECT IS DESIGNED?

HOW DO I INCLUDE MY TARGET GROUP IN DECISION-MAKING?

Representation

HOW DO MAKE SURE THAT PEOPLE CAN SPEAK FOR THEMSELVES?

WHOSE IMPORTANT SKILLS AND BACKGROUNDS ARE WE MISSING?
COMMUNICATION AND COOPERATION

The greatest challenge in working with your target group is giving people who you would like to attend your initiative a sense of belonging. This can be difficult for various reasons, including the medium or the format of the information. Is your target group able to read your text or hear a TV ad? Do they speak the language, is the information presented in a comprehensible way? As a member of the group, do they feel truly welcome?

Clear structure

Text readers for the visually impaired read interactive video text out loud. In order to do so they need a clear text structure because they will orient themselves by the hierarchy of text elements – headings, text body, etc.

Planning [Chapter headline]

→ Communication and cooperation [Headline 2]

→ Clear structure [Headline 3]

→ Paragraph [Text]

→ Informational Text diagram

→ Observing needs [Headline 3]

Observing needs

Communication should remain inclusive throughout an event or a meeting. The task of the supervisors is to develop a clear image of individual participants’ special needs and inform themselves about the best way to ensure an equal playing field for communication. An additional task is to ensure that all participants are equally well informed. When they have access to enough information, participants will behave in solidarity with each other.

- What information does the team or do the participants require in order to meet any special needs?
- How can these needs be brought up for discussion without singling out individual participants as “special”?

Example

DISCUSSION ON ASYLUM POLICY

Is it possible for a blind student to participate easily? Can she obtain the information she needs in an appropriate format ahead of time? Are the information and results noted in such a way that she can use them? Is the discussion designed in such a way that she will also be able to voice her opinion?

Do participants have any influence on the organization of the event? Have formats been chosen that provide as many opportunities as possible for participants to express their opinion? Will there be an interpreter?

Are refugees themselves a part of the event or the organization team? Do they have any influence over the ways in which they are talked about? Do they have sufficient freedom to express their own experiences and opinions?

Example

CONCERT AND PARTY

A concert is an invitation to listen, to dance, and get informed. However, in order to win over new members, or involve guests beyond the level of consumption, you must have additional plans in mind: you can organize one or several small workshops for example, or a quiet space for discussion.

Info

STYLE GUIDE

The US National Center on Disability and Journalism gives ideas about how to talk about people with handicaps without resorting to clichés.

www.ncdj.org
Checklist

COMMUNICATION

HOW SHOULD I DESIGN ADVERTISEMENTS OR INFORMATIONAL PAPERS FOR MEETINGS? WHICH DIFFERENT CHANNELS CAN AND SHOULD I USE? (WRITTEN AND AUDIO TextS FOR THE VISUALLY IMPAIRED, TEXTS THAT ARE PREPARED FOR READING DEVICES)

WHICH LANGUAGE(S) SHOULD I USE IN ORDER TO SHARE INFORMATION AMONG THE TEAM AND THROUGHOUT THE INITIATIVE? (FOREIGN LANGUAGES, BASIC ENGLISH, SIGN LANGUAGE)

WHICH IMAGES SHOULD I USE? HOW SHOULD I REPRESENT THE TARGET GROUP?

WHICH SPECIFIC INDIVIDUALS WITH LIMITED OPPORTUNITIES OR HANDICAPS DO I WANT TO REACH WITH MY INITIATIVE?

WHAT ORGANIZATIONS ALREADY EXIST FOR SPECIFIC SOCIAL GROUPS THROUGH WHICH I CAN SHARE INFORMATION?

WHO CAN I INCLUDE IN MY TEAM?
**POSITIVE MEASURES**

It is one thing to include people with limited opportunities in your thinking from the outset. But in certain cases your team should also consider how to **consciously** privilege otherwise frequently disadvantaged persons, giving them greater space and attention than they would otherwise have. This often happens on a societal level in the form of quotas or affirmative action e.g. for minorities or for women in leadership positions. With a social initiative that could happen in the following ways:

- men and women receiving **equal time to speak** during a discussion
- the **pace of conversation** being determined by those who require translation
- groups with lower visibility receiving preference during **selection**, e.g. as seminar participants or presenting artists
- economically disadvantaged individuals paying a smaller **participation fee**

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**Example**

**PROVIDING ACCESS**

**Legibility**

Is everyone able to read what is written on small cards or a flipchart?

⇒ Try reading or describing discussion results out loud as well

**Comprehensibility**

Is everyone able to see or understand non-verbal signals?

⇒ Nod, point, and smile, but also use verbal expression

**Large groups**

Does everyone feel comfortable speaking in front of a large group?

⇒ Make use of differently sized groups and find opportunities for informal dialogue (e.g. one-on-one interviews or the World Café method)

**Time**

Does everyone have sufficient time to process what has been said, heard, and shown?

⇒ Use consecutive, delayed translation and/or a slower discussion speed; announce and explain tasks step-by-step

---

**Info**

**44 MILLION...**

... people between the ages of 15 and 64 in the European Union registered as having a handicap in 2014.

Source: Eurostat, Federal Statistical Office

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**Info**

**RAUL KRAUTHAUSEN**

“My handicap is my own and is of crucial importance to me. When people try to separate me from my handicap, they deny its power as well as the enormous influence that it has on my life.

I therefore define myself as handicapped, simply because I am. I do not insult myself in the process, because for me being ‘handicapped’ is not offensive to me. I do not let myself be defined by it, because it defines me. I ask myself only one question: Am I handicapped, or am I being handicapped?

That is why I say please do not ignore handicaps. We do not need comfort. We need empathy and a barrier-free world.”

Raul Krauthausen, activist, www.raul.de
MATERIALS AND METHODS

As with the materials you use, all the formats and methods you would like to use for an initiative should be examined:

In which formats and languages is the working material or the documentation required? What technical assistance is required? Are the planned methods and formats accessible to as many people as possible, or are there other more accessible methods that could achieve the same goal?

LOCATION AND ROOM PLANNING

Whether you can enter a space or not does not always have to do with concrete barriers, wheelchair ramps, etc. Anyone who does not assume he will feel comfortable in a place will probably not go.

Thus you should ask yourself:
• How accessible and reachable is the location of my event?
• Which structural and psychological hurdles might the location have?
• What assistance do I need in order to make the location more accessible?

Additional questions:
• Does the location match the character of the project?
• Can the location be used in a flexible way?
• Is there sufficient space to break away into smaller groups?

BUDGETING

One reason that is often given for a lack of inclusion is that there was no money built into the budget for it, and now it is “unfortunately” too late. Therefore, it is all the more important to answer such budgeting questions in advance:

• Which additional expenses will result from inclusive planning? (Translator, companions, material prepared in Braille, interpreter, transport costs…)
• Which sources could finance these additional expenses?

Info
WHAT TO DO?

Positive Thinking

Think about “difference” in a positive way – not as “less” or “worse.”

Questions

Always ask before you help.

Research

Whenever possible, ask individuals with handicaps for tips or suggestions.

Source: 10 things all parents should teach their children about handicaps, www.raul.de

Info
A GOOD BALANCE

Including people with limited opportunities and handicaps in your thinking also means striking the right balance between providing physical and emotional security and new experiences.

Info
WRITING TEXT IN SIMPLE LANGUAGE

Such texts are created for people who for different reasons possess a limited language capacity.

The text has short sentences. It only contains words that are easily understood. There are hardly any foreign words, and more difficult words are explained. The text is easy to read.

www.webaim.org/techniques/writing
Checklist

ANTICIPATING NEEDS

WHAT DO I KNOW ABOUT THE NEEDS AND REALITIES OF MY TARGET GROUP(S)?

HOW AND WHEN DO I INFORM THE TARGET GROUP ABOUT THE DESIGN OF THE INITIATIVE AND ASK ABOUT THE NEEDS OF INDIVIDUAL PARTICIPANTS?

WHEN AM I JUSTIFIABLY CAREFUL, WHEN AM I OVERPROTECTIVE? HOW DO I MAINTAIN A GOOD BALANCE BETWEEN BOTH BEHAVIORS?

WHICH MEDICAL SUPPLIES AND INFORMATION DO I NEED IN CASE OF AN EMERGENCY?

AND FOR DESSERT...

Much of what has been described in this chapter can also help support people without disadvantages. The point is not to always focus on limited opportunity, nor is it to ignore handicaps unconsciously.

Rather, we should experience our interactions with each other as normal, perceive people as individuals instead of “types,” and thus increase our chances of benefiting from different approaches, backgrounds, and viewpoints.
THE PUBLIC SPHERE

CORPORATE IDENTITY

- **Design**
  Core elements of the presentation

- **Communication**
  Language style and both internal and external communication culture

- **Behavior**
  Lived values: social, cultural, ecological, economic aspects
THE TABLE IS SET...

You’ve got the good silverware out, the candles are on the table, and you have prepared your Grandma’s special recipe – by setting the table with these special things, you can show guests how important they are. The same applies to public relations. This involves developing relationships and encouraging others to act. But you have to know what kind of image you want to convey, which channels you can use to advertise, and how to tell a good story....

Communication in the sense of public relations often runs in just one direction. PR (public relations) people are responsible for advertisement: They create press releases, print flyers, and publish posts online. They convey information from the team to the public. However, Facebook and other social media reveal that public relations are changing more and more, that communication takes place in many directions at once and is part of a dialog.

If you create a post online today, it may reach someone you never would have contacted yourself. Or it might be understood in a completely different way than the way it was meant, and it might then be commented upon immediately. Not only do you make new contacts, but you also enter into a dialog about your own topic and your own initiative. This is exactly how the success of a PR campaign is measured in social networks: How many relationships have you built and how deep are they? In fact, this is also the goal of the initiative itself.

SELF-IMAGE

You will find many campaigns interesting, and others embarrassing. Whether or not you find something from an organization convincing has to do with image and the question of how you affect others. You can influence this effect, but you can’t determine it.

The probability that others will see you in the way you would like to be perceived increases if you draw from all possible forms of contact and communication available in public relations: This includes how the team and participants behave, how the materials are designed, how others feel they are being addressed.

Step-by-step, you create a corporate identity, which covers as much as possible: Behavior, communication, and design are interconnected here. In public relations, all three aspects are implemented for all media. They are transmitted out to the public sphere, as well as within your own group and team. The hardest thing is influencing an awareness of your own behavior. You can change designs, you can write texts differently, but to change your behavior, everyone has to participate and the changes have to be recorded.

⇒⇒ Checklist: My initiative’s identity and image
CREDIBILITY

Since you want to change something with your civic engagement project, your own motivation is a very important piece of the puzzle. The public expects a high degree of credibility and authenticity. In terms of a volunteer initiative’s image, this means taking special care when considering your self-image.

• What do you want? Which values are important to you?
• What style suits you best?
• How is that demonstrated in concrete (different) behavior?

WHAT ARE OTHER PEOPLE DOING?

How do other, comparable initiatives communicate? Taking a look at the competition or at colleagues reveals the habits and needs of media users, activists, and supporters. You can adapt to them so that you don’t create friction. But of course you can also do the opposite – and you may gain more attention from target groups and competitors because you’re different. You should take a look at two or three initiatives related to what you want to do to gain a basis of comparison.

• websites
• flyers, stickers, posters
• social media platforms
• other PR activity (such as information booths)

Analysis: Between adjustment and your own profile

• How do other initiatives work?
• How are they designed?
• Which images do they use, what stories do they tell?
• How do they speak about themselves and with the public?

By evaluating other programs, you can get a feeling for how you would like to work, how you would like to communicate with other people and within your team, what way of organizing your project seems appropriate and best for you. And last but not least: what suits the initiative itself.

Info CHALLENGES

Appealing aspects

Emphasize the appealing aspects of your own behavior.

Don’t make problems the focus of your work. Instead, talk about opportunities associated with the initiative and its positive effects.

Arrange things reliably

Adapt the form of the initiative and the PR language to your own style and way of doing things.

Don’t “disguise yourself” but rather use your own style to remain authentic

Notice contradictions

Avoid contradictions in your own image and how you are perceived by those on the outside.

Some people just think of activists as “good people” and not serious partners – the same people may consider the civil society as a playing field for underemployed pupils and students. Don't be insulted, and don’t feel insecure. In the end, the proof is in the pudding, and what you’ve achieved may win such people over.

Example

CIVIC ENGAGEMENT IN A SCHOOL

The initiative deals with participation at a school. The two people who had the idea are making all the decisions by themselves and want to have a say in all the steps in the initiative’s process. Here, the initiative’s requirements and its image are not well suited to one another...
Checklist
MY INITIATIVE'S IDENTITY & IMAGE

Design – colors, visual motifs, styles
WHAT SPEAKS TO THE TARGET GROUPS?
WHAT DO SUPPORTERS RESPOND TO?
WHAT IS TYPICAL OF SIMILAR INITIATIVES?

Communication – Language style
WHAT LANGUAGE AND WHAT STYLE OF SPEECH WORKS WELL FOR ADDRESSING THE TARGET GROUPS?
WHAT SPEAKS TO THE SUPPORTERS?
WHICH STYLE SPEAKS FOR ME?

Behavior and impact
WHICH OF MY INITIATIVE’S BEHAVIORS APPEALS TO THE TARGET GROUPS?
WHICH OF MY INITIATIVE’S BEHAVIORS APPEALS TO THE INITIATIVE’S SUPPORTERS?

Principles and values
WHICH IMAGES AND METAPHORS REPRESENT MY VALUES?
HOW DO I ADDRESS THE PEOPLE WHO OTHERWISE SELDOM PARTICIPATE IN SUCH ACTIVITIES?

Research
WHAT DO I NEED TO LEARN MORE ABOUT?
WHERE AND THROUGH WHOM CAN I LEARN?

Checklist: Inclusion, participation, representation

Content and channels
WHICH CHANNELS INTEREST THE TARGET GROUPS AND WHICH ONES DO THEY USE?
WHAT ABOUT THE SUPPORTERS?

INITIAL IDEAS FOR A CREATIVE CONCEPT:
•
•

SPECIFIC NOTES ON LANGUAGE AND STYLE:
•
•
COMMUNICATION CHANNELS

As you research, you will establish preferences for certain forms and styles of communication, styles that are relaxed or serious, that use pink or green, are neutral or biased, use texts or pictures. No matter what form, your own image should be explicit and recognizable in each channel. In particular, the basic elements should remain the same throughout, no matter what channel you’re using: We associate Amnesty International with the color yellow, we recognize the bird from Twitter in any color, we connect the word “Occupy” with specific content and values. In other words, for each of these, the core elements remain the same even if each communication channel has its own special requirements in terms of text format and technical execution.

On the other hand, your choice of channels itself also conveys an image. In principle, communication channels can be open to everyone or just to “insiders.” Some channels are ones you can open yourself and use in your own way; for others you need professional mediators, such as journalists, or official approval from the city if you want to use public advertising.

➤ Checklist: PR channels

DISTRIBUTING CONTENT

Of course content also conveys an image. Specific stories, images, or words return again and again in order to represent the initiative. From the outset, there are certain texts or images you will use frequently – in this way it’s worth having a few good formulations and cornerstones that can describe the initiative clearly and succinctly. Or a few vivid photos that are appropriate for a website or for a flyer. Or a short video for social media platforms.

The type of text or images you need depends on the specific channel in question. That doesn’t mean that you have to use every channel. Social media offer an abundance of overlapping benefits and multiple uses, if you adapt your content a little.
Checklist
PR Channels

**Social media**

Easy to use, self-determined, largely free of charge, broad distribution

- Personal networks (e.g. Facebook, LinkedIn, Xing)
- Image platforms (e.g. Instagram, Pinterest)
- Messenger (e.g. WhatsApp, Threema, SIGNAL)
- Video portals (e.g. Vimeo, YouTube)

**Media**

Access through contact, fixed formats, local distribution, respectable image.

- Newspapers
- Blogs & News portals
- Radio & Internet radio
- Television stations

**Printed material**

Initial attention, durable, "hands on", costs something

- Flyers and postcards
- Stickers
- Posters
- Brochures & publications

**Events**

Enables direct conversation, deepens informational content, organizational effort

- Discussions, seminars
- Events (concerts, workshops, sports tournaments, performances, readings)
- Demonstrations, protests
- Information booths or presentations

**Initial ideas**
A GOOD DESCRIPTION

You should always be able to describe your own initiative in a few words. For instance, imagine that someone holds a microphone up to you for a 10-second statement. You meet your “dream sponsor” but that person doesn’t have much time. The teacher wants to know what you’re working on so intensively...

The heart of the initiative should be presented as succinctly and precisely as possible. After this door opener, you usually have the possibility to go into greater detail – and at this point it’s still important not to lose the thread or lose yourself in too many details.

Summarizing an idea that you’ve been working with for a long time is an art and is something you have to practice again and again. Among PR people, the (not entirely politically correct) saying goes: “Your granny has to be able to understand it right away!” So why not ask family and friends whether they can help you practice and give you feedback about how comprehensible and convincing your description is?

Method

ELEVATOR PITCH

How long does an average elevator ride last – 30 seconds? Imagine that you meet a person in the elevator and have just that amount of time to convince him or her of your idea. You have to be brief, easily comprehensible, and positive.

Make clear why the initiative is important to you. Try to come up with a “hook” that catches the person’s attention and say clearly what you want from the person – his or her good reputation, material support, contacts...

The elevator pitch is often used in applications or product fairs where you have to present yourself or a product to someone convincingly in a very short time.

Info

CONTENT PYRAMID

The reverse pyramid can help to reduce content and describe it more precisely. A text should start with the essential – the things that another person absolutely has to know. Then specific information and background can follow. The information can be approximately proportioned in this way:

- **35%:** WHO, WHAT, WHEN, WHERE
- **30%:** HOW, WHY, FROM WHAT
- **25%:** SPECIFICS
- **10%:** BACKGROUND
Method

PROJECT DESCRIPTION

Problems & requirements
Especially at the beginning, speak to readers or listeners as directly as possible, with concrete examples or good descriptions.

- What is the problem, what does it require?
- What impact is the initiative trying to have?

Goals & impact
Describe your goals and how the initiative will reach them.

- What solutions does your initiative offer for the problem at hand?
- How exactly will your initiative improve the situation?
- What about your initiative is special or innovative?

Process & implementation
Describe the most important steps in planning and the intended result or outcome.

- What will you do when, where, with whom, and for whom?
- What specific steps will you take?
- What result will you see at the end?

Type of Initiative
Describe the type of initiative you are organizing and your planned actions.

- What form will your initiative take?
- Why is this form the best for your goals and interests?

Appeal & requests
At the end of a text, make a connection to the beginning again and summarize the most important goals in one sentence.

- What value does the initiative have for a certain target group or region?
- What specific social development does the initiative support?

Contact
Offer at least one possibility to make contact – and deepen relationships.

- Telephone number
- Email address
- Facebook page
- Messenger account
- Website
- Postal address

What should the long version entail?

- Specifics about target groups/people
- Team, partners
- Supporters and promoters and the type of support
- State of planning
- Form of public relations work
- Budget
- Forecast for the future: potential follow-up activities
A GOOD STORY

Stories are a way of passing on knowledge, sharing experiences, and imparting values and standards. Good stories activate our senses and our hearts, they remain in our memories and we enjoy passing them on. Storytelling involves one person connecting to another, and in this way it also involves the development of relationships. Stories inspire the listener to compare and align his or her own experience with the story itself. You might forget the numbers and specific information from a lecture or a presentation, but you often remember a story, and the answer to the question “What does that have to do with me?”

Anyone who wants to find supporters should have a supply of good stories. An initiative's goals, the difficulties it faces, and the successes it has already achieved – all of these can be included in a story. A story like that can be told anywhere and within any context: in the 140 characters of a Tweet, in a video, or in a documentation brochure.

Info

BASIC RECIPE FOR A GOOD STORY

Whether they are literary or cinematic in nature, many good stories have three elements in common: a main character, a desire or a goal, and a conflict. These elements come together in an arc of suspense.

1. The story opens with an initial situation.
2. The main character appears, and has a goal or a desire.
3. This character sets off on a journey, and overcomes obstacles, or is faced with conflicts.
4. Once the goal has been reached, a development or a transformation takes place, often summarized in a “universal” moral.

The protagonist can be either you yourself or the team. The journey serves as the central literary device, but you can also play with different genres. Crises and conflicts are important elements because development without setbacks or mistakes is often boring.

Method

THE GENRE MATTERS

Allow yourself to be inspired by the variety of possibilities for telling stories. Thrillers, romances, comedies, sports stories – which suits your initiative best? First collect typical style elements and conflict situations. Then describe your initiative in the appropriate style.

- Crime thriller: Crime, motive, criminal, witness, police, commissioner…
- Sports story: Athlete, obstacle, arena, team, victory…
- Romance: Lovers, love story, rivals, fluctuating feelings, a happy ending…
- Comedy: mistakes, misunderstandings, confusion, slapstick, satire…

What other genres can you think of?

If you would like to use the story again later, you can also tell it in another genre or another form, e.g. a photo essay or a film. However the type of story should always suit the initiative and its creators, otherwise it will quickly start to seem artificial.

Method

ARC OF TENSION

Thinking about your initiative, complete the following sentences.

1. There was once…
2. And every day…
3. Till one day…
4. And that’s why…
5. Until finally…
VISUAL LANGUAGE

Just as there are different styles of language, there are also different visual styles that can be attractive or irritating. Visual language includes colors, photographs, illustrations, font, the way information is transmitted, and the media and their particular characteristics.

As you can see from the examples, there are many ways to adjust and define these items. To what extent do you want to work with established ways of using color and images? To what extent do you need to find your own way of using them?

Color

Colors can help organize visual information, and show which issues, groups, and areas you are associated with. A bank that is trying to convey its integrity might do well to use blue, for example. However, colors can also inadvertently put people into boxes and perpetuate stereotypes.

Should boys always be connected with blue? Should girls always be associated with pink? Is Islam equivalent to women with headscarves? Even if these images are common, you can’t implement them into your initiative if you don’t want to contribute to perpetuating prejudices.

Method

IMAGE SEARCH

When we conduct research using a search engine, they offer us a lot of information that was only available to a few experts in the past. An image search gives us information about

• what kind of visual languages are frequently used in our context
• whether or not certain colors are preferred, and if so, which ones
• which metaphors and symbols are commonly used and understood

Banks

Stereotypes

Method

FOCUS GROUP

Bring together a small test group of people who are in some way representative of your target group or other important groups related to your initiative. They can give you feedback as to the comprehensibility, impact, and adequacy of your visual ideas. Ask them

• what they understood
• what they thought was good
• what bothered or confused them
• what other suggestions they have
Visual language

Youth
One very popular motif is young people standing close together and laughing. Here the average age that people share is emphasized, not their different backgrounds. Young people also represent improvisation, DIY ways of doing things, and new ideas, in contrast to ways of working that are planned, produced, and refined.

Poverty
When an initiative involves a charity, it often employs images of smiling children. If it involves the ugly side of society, anonymous poor people are often shown. The colors that are used to represent poverty are usually very subdued.

Some critics object to the use of photographs of poor people for such a cause, saying that even poor people have dignity and deserve to be photographed like other people: in ways that show their self-confidence and let them express themselves.

Democracy
Complicated diagrams or the voting process itself are often used to represent democracy. This might include images of voting, and groups making decisions and creating structures.

Democracy is more than this, however: it is also a system of values and a process. How can this be represented visually?

For example, you could show what democratic cooperation in an initiative actually looks like, or develop images that symbolize your own democratic values.
Info
SYMBOLISM

Symbol: Christianity  Icon: Telephone  Index: Childhood

The cross symbolically represents the person who was crucified: Jesus Christ. This fact alone can serve as an explanation of the symbol. Hundreds of thousands of other people have been crucified, but we don’t think of all of those people when we see this symbol.

Today telephones no longer look the way they did in the past, though we still recognize this image as a phone. What we see as an icon has a similarity to today’s telephone. The brightly colored, painted hands stand for the light-hearted nature of childhood. They correlate to feelings and recall situations from our pasts. A lollipop, a marble, and soap bubbles might remind us of similar things.

Logo

Logos and names have very important meanings for institutions’ identities. Therefore it matters greatly to them that their logo be properly designed and that rules for terminology are maintained.

• Always respect correct names and titles
• Clarify whether there are requirements for how the long name of an organization appears or whether you can decide that for yourself
• Only use logos that the organization has authorized
• Adhere to color rules if there are any
• Do not copy, distort, or change logos

Proper treatment of logos  color changes only upon consultation  no distortion  no copying no modification
When it comes to details, working with texts requires patience and care:

- use characters **consistently** throughout
- use **correct characters** (such as dashes, quotation marks, delimiters)
- pay special attention to writing numbers, names, and titles **correctly**

An interesting glimpse into the world of typography can be seen here:

www.typefacts.com
www.thinkingwithtype.com
www.ilovetypography.com

**TYPOGRAPHY**

Typography is the art of making readable and appealing text through the use of different styles of letters. Since reading words is such an integrated part of our lives, we often fail to notice it consciously. That means that even though Word, OpenOffice, and LibreOffice create so many possibilities for writing and shaping text in our work, poorly created texts are still bothersome. Like photos, illustrations, and well thought out texts, the typography itself can set the stage for your initiative.

**Increase comprehensibility**

Text design can provide increased **comprehensibility**, logic, order, and clarity. However text design can only contribute to increased legibility if the texts are already reasonably clear: They need to be built of well developed ideas presented in a clear structure. The tips in the box on the left can be helpful in this regard.

**Image**

The choice of how text design also provides information about the initiative, its values, and its style. In corporate designs, typography has played a very important role for decades, and a great deal of money is spent on corporate fonts and custom-made fonts designed specifically for a particular company or group. We recommend taking these thoughts into consideration for your project PR. For example, you might:

- make a conscious selection of a typography that suits your goals, values, and approaches
- incorporate typography into a creative overall concept that is derived from the corporate identity
- reflect on different registered designs with various supporters and in various societies
PHOTOGRAPHY

Most initiatives use photos to document what has taken place. This frequently entails personal photographs taken of the supervisors and their guests. Some people use photos so that they can later determine more precisely the numbers of participants they’ve had, others photograph their posters as a way of documenting results.

Metaphors and images

Photos for advertising purposes serve a different purpose than documentation; they transmit messages that you want to convey. With advertising photos, you should consider symbols and metaphors. These aren’t photos that focus on specific people, but ones that depict typical situations or interesting stories.

How can you represent your initiative in this demanding way? One rule of thumb is that a photo should be interesting to those people who don’t know the people in the photograph. In other words, you’re looking for typical or symbolic moments. On the other hand, you shouldn’t conform too strongly to existing images. After all, images of young people holding hands and laughing are very common. But what is special about your specific initiative? Props like a megaphone or a felt-tip pen can be helpful in the visual representation of something.

Example

UP CLOSE AND PERSONAL

Speakers are often photographed from behind because the photographer didn’t want to disrupt the situation. Summon some courage and get closer to the important people!

A common type of image in youth work.

Accessories can help you develop playful scenes. In the search for a personal motif, this group used a megaphone.

This photo is from an international meeting and, as you can see, doesn’t have a single person in it. The multicolored chain stands for fashionable jewelry from Russia. And this kind of felt-tip pen is often used in seminars.
Groups

Photographing groups can be tricky because you have to get everyone to stand close together. Even then, some people are in shadow, while others are very well lit – and that’s problematic for image quality. If you increase the size of a photo of a larger group, the details often become fuzzy and pixilated. The same thing happens if there is too little light. A camera with a large sensor and even exposure can help combat these problems.

An alternative to a group picture can be several pictures of smaller groups. These can be easier to put together and often seem more casual.

Note: When shooting outdoors, direct sun should be avoided. It creates deep shadows that in turn lead to uneven lighting of people’s faces.

Using a detail

Photographs are interpretations of reality. By choosing to zoom in on a specific detail, you can clarify your message. Do you want to emphasize the collaboration in your team (bottom right) or the individual work (bottom left)?
Locations

Some photographs incorporate their locations deliberately, as in the first photo, which shows a team member from a grassroots project. The contrast between the green and the busy streets grabs viewers’ attention. The middle photo makes use of the dominant lines of the event space in its composition.

The image at the bottom aims at the opposite: it looks to make the foreground subject clearer in contrast to the out of focus background, with all its distracting details. The image at the very bottom shows a TV studio. Here everything is arranged for a fitting visual composition.

Info

INDOOR PHOTOGRAPHY

Indoor lighting conditions can often be difficult. While someone is giving a presentation using a projector, the room is dark. The light at the podium casts hard shadows on the face of the person speaking behind it. Or there might be cardboard boxes in the background and a bunch of chairs around. If you pause to consider your goals with taking photographs, you can prepare the space beforehand and think about how you want to set your central motif “in the right light.”

- Choose the place with the most light. Make sure important areas of a room are well lit beforehand.
- Don’t place a stage or podium in front of a window (the bright background will mean that the foreground will be too dark).
- Remove distracting details from the background.
- The flash on a camera can cast hard shadows and make photos flat if the camera is too close to the subject matter.
- The flash can also make photos look gray if the camera is too far away from the subject.
Checklist

Photos

Lighting

Which areas are well lit?

Which can be lit better?

Stage

How well lit are the speakers or other people on the stage?

What's the best way you can arrange these people? In pairs? As a group?

Are there water bottles or microphones in the way? (If necessary, change where you’re shooting your photos from)

Where does the camera have to be placed in order to include everything in the shot?

Background

Can you take away bottles, plants, bags, posters, and photographs from the background?

Are there distracting reflective surfaces?

Make sure the background is arranged as simply as possible (curtains closed, few details, title banners)

To-do list
CREATING AND MAINTAINING RELATIONSHIPS

You’ve done a lot of research, done a lot of deliberating, created texts and photographs – now the results of your work are brought into the public arena. They form the basis for specific PR work, which – as you remember – is first and foremost about relationships.

Supporters, participants, involved artists, team members, the neighborhood, the world at large – everyone wants information about your initiative, and many of them will want to receive regular updates. Because this is quite a lot of work, PR department tasks should be distributed clearly. At the same time, having set point people is important, because it’s much harder to build a relationship if a different person is answering emails every week.

WHAT HAPPENS IN THE OUTSIDE WORLD

Relations can be better maintained if you know what’s happening in the outside world. Certain events are relevant to the target group, others for planning, still others for the initiative’s content.

For instance, having an initiative’s film premiere on the day of the final match of the European soccer championship = 😊

On the other hand, anniversaries, elections, public conflicts, scandals, and fashion trends attract a lot of attention. Early research into specific dates and issues can help your initiative use these external events for discussions and integrate it into PR work.

On the following pages, you will find suggestions for how to use an agenda to organize an initiative’s local events, appointments, and internal dates.

Info

• Media planning: try to get an overview of which media channels make the most sense to use. Social networks, for example, are a channel for the whole duration of the initiative. Newspapers and local broadcasting stations are better for reporting on a specific events. Flyers and stickers can help raise awareness of your initiative from its outset, but can also advertise events and final results.
• Facebook: Set up a page, determine editors, and post new content regularly.
• Text editing: Decide who the editors will be, pay attention to special opportunities and events, and write customized texts.
• Newsletter: Select a layout design, create texts and images, manage addresses.
• Donation drives: Plan and organize offline actions, research suitable locations and times, prepare your materials and team.
• For online actions, research websites, create good project pictures and descriptions, calculate your ideal donation goal (more on this in the fundraising chapter).
• Press: Research contacts to journalists, write and send a press release.
• Supporters: Keep individuals and sponsoring institutions up to date, mobilize help and assistance.
• Publications and printing: Plan and design flyers, posters, postcards, and stickers; research printing services; order and inspect your printed materials.
• Images and sound: Plan videos, photos, and sound documents; organize the corresponding technology and shoots; attend and photograph events; edit your recorded files.
• Documentation: Organize your archiving system, document work procedures and successes in text and image, collect press reviews and participants’ comments, archive materials, prepare data for the final report.
**Method**

**PLANNING ISSUES**

Fill out this table for your initiative.

**Major events and local appointments**

Which major events and issues are pertinent in your city and your country over the next few months?

**Dates for the target group and your team**

Which major events and issues are pertinent to your target groups in work, education, and public life?

---

**Example**

**AGENDA: GREEN SCHOOL**

<table>
<thead>
<tr>
<th>Actions &amp; channels</th>
<th>Content</th>
<th>Event</th>
<th>Timeframe</th>
</tr>
</thead>
<tbody>
<tr>
<td>• meeting with leading candidates</td>
<td>• The school has to take environmental issues seriously</td>
<td>Last phase of the election campaign</td>
<td>May 8th to 22nd</td>
</tr>
<tr>
<td>• discussion paper with suggestions for a green school</td>
<td>• The student group &quot;Lend a Hand&quot; promotes a concept for green schools</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Facebook campaign &quot;Our school should go green&quot;</td>
<td>• Examples include: more vegetarian and organic meals in the school cafeteria, using recycled paper, and intelligent lighting in the school building</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

---

**DO IT RIGHT AND REPORT ON IT – DOCUMENTATION**

Most of an initiative’s documentation is collected at the end. You can use documentation to thank supporters and participants, you can use it for your own reflection, but most importantly, you can use it as a **reference point** when applying to work on later projects: “Look what I’ve done already, look at what I’m capable of!” So it’s really worth it to get good looking documentation.

Supporters normally request a **formal** final report. This can comprise various elements: Exemplary stories help to represent experiences convincingly. Pictures can convey the atmosphere of an action, while numbers and facts help people quickly develop an idea of the situation. Everything together can create a clear, descriptive portrayal of the initiative.

**Certificates of participation** can also be part of the documentation. They confirm the organizers’ and participants’ commitment. Participants can then use these in educational and professional settings. A nearby organization or the city administration can issue an “honorary post certificate” (or “volunteer certificate”). More and more organizations, municipalities, and states want to recognize such commitment formally.
THE MORAL OF THE STORY

Transparency is important to politicians, to FIFA, and to corporate groups. But don’t small initiatives also have an obligation to transparency? Everyone who acts on behalf of others has to provide honest information about his or her goals, at the very least. This applies to small initiatives as well as to large organizations and companies. Only in this way can you allow others the chance to form an opinion and decide whether or not they want to support you.

Many volunteers take action because they want to do something good. It’s normal for them to feel discouraged when they encounter a person who feels mistrustful and asks a string of questions about why they are doing something, where they’re getting their money, who is supporting them. That can feel unfair, but this initial lack of trust is often legitimate. There are plenty of cases in which initiatives and organizations are used to launder money. Others pretend to be a civic initiative while they are actually the secret PR department of a company or political party. Your work will be much easier if you lay all your cards on the table.
FUNDRAISING
...AND WHO’S GOING TO PICK UP THE CHECK?

When there are limited funds for dinner, one person brings the dessert, another brings something to drink, and at the end everyone cleans up together. Any good idea needs support, whether that support is financial, moral, or energetic. This chapter looks at the means your initiative will rely on and who can provide them, how donors think, and how to raise money on the Internet...

The term “fundraising” is defined as “gathering resources.” The term “resources” is a neutral one, and makes clear that fundraising is not only about finances. In the end, money is only one of the resources you will need to carry out an initiative – in a successful fundraising effort, you will gather many resources, some of which may even come free of charge.

ANALYZING NEEDS AND RESOURCES

The groundwork for any initiative should already be in place before you make an analysis of what will be needed for your project’s successful implementation.

Method
WHAT DO I NEED AND WHO CAN HELP ME?

Sit down with your team and talk through your initiative day by day – almost like running a film through your head scene-by-scene. Record this process graphically or in writing. Think concretely about objects, places, and services. Everything revolves around the question: What and whom will I need in order to carry out my initiative? From this set of needs, you can develop a list of the resources you will need:

Which resources are available to you?
Who is providing what?

You can always build on and add to the list of who you might appeal to.

Resources
Bread from the bakery,
Marmalade team,
Uncle, Community
Foundation of Neuburg,
City administration of
Neuburg

Needs
Breakfast,
Transportation/car,
Money for participants’
accommodation,
Insurance for
participants
LOW BUDGET INITIATIVES

Many initiatives succeed without asking anyone for money. They organize the use of their own space, participants buy their own drinks, invited experts participate without charging a fee, and artists work for the money brought in by the price of admission. Providing the necessary means for an initiative in this way is nothing short of miraculous. The greatest advantage is that you can do whatever you want. No sponsor, teacher, or anyone else decides how your initiative should take place.

In addition to financial donations from individuals, organizations, or companies, there are a vast array of types of donations that carry monetary value. Anyone who communicates a willingness to participate becomes an actor who then informs others about the initiative, becoming a part of the initiative in the process. Seen in this way, you could argue that the best low-budget initiative is one that can be implemented without money but with the help of thousands of people, a “zero-budget initiative.”

HOW TO DEVELOP A BUDGET

A budget is an estimation of your initiative’s costs. This includes any expenditures or income that you may have ahead of time, e.g. admission fees or contributions from participants. In order to calculate your budget, you need to research the costs ahead of time – both those for which you will actually need money as well as any in-kind donations.

Even if it is only an estimate, a budget needs to be realistic. Backers normally know how much things cost, and will view estimated costs that are too high or low as evidence of poor planning. In addition, a budget must also clearly demonstrate how you arrived at the total, and which costs belong to which activities – the example shown at right should thus be designated as a planning meeting by name in the budget, and not just as a “required amount” under office materials or supplies.

In conclusion:
• list all expenditures connected with the initiative
• estimate the total amount of all expenditures
• create a realistic and plausible budget

Example

Calculation

Planning meeting:

Facilities: 3 meetings x 50 € rent (in-kind donation) = 150 €
Beverages, cookies, fruit: 3 x 10 € = 30 €
Office materials for all meetings = 40 €

Total: 220 €

To find out what a cost overview looks like, refer to the “Finances” chapter.
**Info**

**IN-KIND DONATIONS**

In-kind donations include anything that you receive free of charge, that you would otherwise have to pay for – a free room from the city government, fruit from the supermarket, art materials from a paper shop...

---

**RAISING MONEY**

In order to increase your initiative’s effect and to work more efficiently, it can be useful to have a budget somewhat larger than zero or the absolute minimum, as the example below will show.

As you will see, it is important to be able to do what you want without being completely reliant on others. Often, however, you quickly run up against the question of what is actually needed in order to better reach your goals (a deeper exchange among participants) or to increase the efficacy of your initiative (planning campaign). That’s where fundraising – raising money – comes into play.

But how are you supposed to obtain these additional funds? The answer varies widely across Europe. In Germany there are numerous institutions that can provide smaller amounts of money that are directly or indirectly supported by the state. In Bulgaria, most funding comes from foreign sponsors. In England there is an active network of charity organizations that finance initiatives through donations or sales.

Business donations also vary greatly according to where you live. Often, small, local businesses are happy to donate. In many countries, larger companies donate money only to larger projects that will have a good public relations effect.

---

**Example**

**WOMEN’S WORKSHOP**

A group of engaged younger girls and women meets one night a month to talk about gender roles and gender equality. These meetings take place without accruing many costs because everything is either free of charge or is financed by the participants themselves.

In order to think about how to become more effective as a group – instead of just talking – it would be helpful to create a framework in which participants can work together over time, find inspiration, and get to know each other better personally.

An ideal situation would be a weekend spent at a youth hostel or a hotel. In order to increase the efficacy of the initiative and the participants’ motivation, additional means are therefore necessary.

---

**Info**

**DONOR**

Donors’ motivations are often unclear, therefore it is often best to use the term “donor” in your texts.

**SPONSOR**

On the other hand, sponsors are people who expect a concrete return that will prove favorable to them.
DONORS’ INTENTIONS

As varied as the conditions are that make people want to donate funds, their intentions are universal: They want to give money.

Charities and philanthropies

Some institutions donate money as a part of a certain goal they have set for themselves. Such a goal might be the promotion of peace, human rights, local education, the environment, or any number of other causes. Often they are foundations that have received money from a wealthy donor, funds that they then administer and grow, spending the profits on one of the purposes mentioned above. In such cases, these foundations’ work is described as philanthropy, or charity. If you receive support from a philanthropic organization, it is because your initiative is aligned with the funding goals or values of the organization.

Sponsoring

The situation is different with a sponsor. Sponsors do not give money out of charity. They expect concrete returns from the initiative that will benefit them. If you want to attract an institution as a sponsor, you first have to clarify whether or not the project for is suitable for sponsorship. Sponsors are often very focused on numbers and an initiative’s PR effect.

Mixed

A company is not always just a sponsor. The people who work at a company are also human, and are often thinking on both levels. For example, some companies support initiatives in which their employees are active. On the one hand, this comes out of a sense of charity, while on the other hand, it comes from a desire to create an image of a company that is invested in its surrounding community. An initiative that wants to receive funding has to carry out a personal discussion to find out more about the nature of a company’s or individual’s motivation to donate. Depending on this motivation, the company or individual may offer and expect very different things.

WHAT DOES A REQUEST FOR FUNDS LOOK LIKE?

Before a donor gives you money, you have to request it. Foundations and institutions usually have their own forms to fill out. Often there are pre-determined application periods, or set dates during which you can make the request. You should be well informed with regard to both forms and application cycles, but also with regards to the exact conditions of the request.

Who are these mysterious donors, actually? For smaller initiatives, it might make sense to research funding possibilities on a local or regional level: many municipalities have a designated social fund for city district work; partnerships between cities are an interesting possibility for international projects; there are often school groups that support activities for young people... At its heart, a request often involves a detailed description of the initiative, as was outlined in the project description (p. 75). This includes a description of the problem(s) to be addressed and a solution, goals, methods, and an introduction to the project team. This information is supplemented by a cost overview or budget, and often a timeline and schedule.
A SPECIAL THANKS GOES TO.....

Thanking everyone who supported you isn’t just something that Oscar winners do. Whether you raised ten euros via crowdfunding or received a 1,000 euro donation from an institution, whether your neighbor brings by some sandwiches or a friendly journalist does a story on the local radio station – everyone deserves a thank you. It’s not just a question of being polite, it’s also pure self-interest: Finishing one initiative means you’re free for the next one. And if someone remembers you fondly, they’ll support you a second time...

RAISING MONEY ON THE INTERNET: CROWDFUNDING

Financing initiatives through numerous, smaller donations has become a common strategy. In the physical world you might organize a cake sale or put out a donation box to ask for donations; on the Internet you organize a crowdfunding initiative.

In crowdfunding, an initiative that needs funding introduces itself via a platform on the Internet, and announces a set amount of money that it wants to raise. Internet users then donate small sums of money until a pre-determined period of time has elapsed. The “crowd” (a group of online users) participates either in the form of donations or on the basis of rewards, i.e. individually.
designed **perks** (from the word perquisite). These rewards often provide deeper insight into the initiative, and are seen as compensation.

The concept of crowdfunding was first developed by musicians and other people working in arts and culture. Since 2000, young bands have financed new albums with the support of their fans via the platform ArtistShare. The compensation mentioned above usually came in the form of a CD or download of an album. In recent years, interest in crowdfunding has grown, with more and more social initiatives or start-ups financing themselves via these platforms. Even young athletes have raised money in this way in order to participate in expensive competitions.

Today, there are a number of crowdfunding platforms, most of which work on a national level, some of which are also international, i.e. kickstarter.com or indiegogo.com. On some of these platforms, users can donate money as well as time, becoming a team member as it were. In the last few years, regional platforms focused on certain topics or target groups have also cropped up.

**PR through Crowdfunding**

Crowdfunding is not just easy money. In the end, only about 60% of all initiatives manage to raise the full amount of money they needed and are actually funded. As with every other fundraising effort, you can’t simply start a crowdfunding campaign – you have to plan carefully. At the same time, such a campaign is truly a PR tool. If you can convince others to donate five or ten euros to your initiative, person by person you can slowly build a long-term network of supporters. People waiting impatiently on their perks are like customers waiting for the end product of the initiative, whether it is a brochure, a film, or a jar of homemade jam.

**Example**

**BALKANS, LET’S GET UP!**

This initiative collected money through crowdfunding for projects that were then carried out by teams of volunteers across southeast Europe.

**What is unique about crowdfunding?**

It is a great opportunity to raise small sums for volunteer projects. Communication can pose a challenge however, because you have to be in touch with many donors at the same time, and provide regular updates on the project.

**What do you suggest to initiatives that want to try crowdfunding?**

Our project offered many smaller activities at the same time, so we always had to come to new agreements with each project team. That takes time. It’s better if you have only one activity.

**Why would you do it again?**

Because crowdfunding is such good PR for your own goals. Additionally, it’s encouraging to have so many people support your work.

[www.balkansletsgetup.org](http://www.balkansletsgetup.org)
**Checklist**

**Crowdfunding**

**Payment**

What kinds of payment is your target group familiar with? (Credit card, PayPal, transfer)

Will your initiative receive the money it has raised even if it did not reach its set goal?

**Fees**

How high are the fees that the platform charges?

**Duration**

How long can a campaign run?

Can you extend it?

**Perks**

What kinds of perks are available?

Can you change the perks you are offering during a campaign?

**Donation receipt**

Can you offer a donation receipt to donors?
THE BILL, PLEASE

When you finish a meal at a restaurant, you have to settle the bill. The same goes for an initiative. Independently of who is going to pick up the tab, the finances should be transparent and comprehensible. And keep in mind: no one wants to be surprised by the amount of the bill. This chapter is about income and expenses and “financial fair play”...

We’ve all heard of politicians, the mafia, or international sport federations involved in corruption, lining their own pockets, or laundering money. Most people, however, are troubled by a lack of transparency and want everything to run in an honest way. In civil society, honesty in financial matters is important for different reasons:

- for ethical reasons, for your own morale
- for your own ability to maintain an overview of the situation and be able to use your funds effectively
- for volunteers to be able to show others that they take transparency seriously
- for donors and supporters, so that they can see what is happening with their money
- for institutions that are supporting you, so that they can explain their support

Some people can express themselves better in words, others in their actions, and still others express themselves better in numbers. As you might assume, people who are better with words don’t find work with money very exciting, and might even feel intimidated by it.

In a small initiative, however, you don’t have to be a genius with numbers to satisfy the necessary measures for honesty and transparency. You just have to learn a few things. If you have a sponsor, you’ll work closely with budgets and invoices. Each organization has its own methods, but the basic principle is always the same.

We would like to have
  application
  cost overview, financial plan
  grant
  confirmation, conditions
  Receiving funds
  income
  request for funds to be dispersed,
  bank transfer
  Spending money
  expenses
  documentation, receipts list
  Transparency
  documentation
  invoicing
  itemized lists, reimbursement
  Receiving funds
  final payment
  additional payments
REQUESTING FUNDS FROM DONORS

Considerations about incidental costs and which funds will be used to pay these costs is outlined in the cost overview and financing plan. The more concretely you have planned your project, the more aware you are of what resources you actually need, and the better you know which expenditures are really going to accrue, the more exact your cost and financial plan will be. A simple cost overview might look like the example below.

WHEN YOUR GRANT IS APPROVED

The donors will issue a grant agreement and a description of their funding conditions (in other words: the terms of their award) that notifies recipients that they are receiving a grant and under which conditions the sponsor will support a project. The agreement becomes valid after it is signed by both parties.

There are often grant conditions that are specific to the organization. Significant changes to the cost overview and financial plan often need to be approved in advance.

Example

COST OVERVIEW FOR A ONE-DAY EVENT

<table>
<thead>
<tr>
<th></th>
<th>Total Costs</th>
<th>Payments from Participants</th>
<th>In-kind Donations Converted into Monetary Value</th>
<th>Third-party Funds</th>
<th>Funds Requested</th>
</tr>
</thead>
<tbody>
<tr>
<td>Space</td>
<td>250 €</td>
<td>0 €</td>
<td>100 €</td>
<td>0 €</td>
<td>150 €</td>
</tr>
<tr>
<td>Travel</td>
<td>0 €</td>
<td>0 €</td>
<td>0 €</td>
<td>0 €</td>
<td>0 €</td>
</tr>
<tr>
<td>Accommodation</td>
<td>0 €</td>
<td>0 €</td>
<td>0 €</td>
<td>0 €</td>
<td>0 €</td>
</tr>
<tr>
<td>Meals</td>
<td>700 €</td>
<td>100 €</td>
<td>100 €</td>
<td>0 €</td>
<td>500 €</td>
</tr>
<tr>
<td>Insurance</td>
<td>0 €</td>
<td>0 €</td>
<td>0 €</td>
<td>0 €</td>
<td>0 €</td>
</tr>
<tr>
<td>Office supplies</td>
<td>50 €</td>
<td>0 €</td>
<td>0 €</td>
<td>0 €</td>
<td>50 €</td>
</tr>
<tr>
<td>Postage/Internet/telephone</td>
<td>100 €</td>
<td>0 €</td>
<td>30 €</td>
<td>30 €</td>
<td>40 €</td>
</tr>
<tr>
<td>PR</td>
<td>75 €</td>
<td>0 €</td>
<td>0 €</td>
<td>20 €</td>
<td>55 €</td>
</tr>
<tr>
<td>Acquisition of goods</td>
<td>0 €</td>
<td>0 €</td>
<td>0 €</td>
<td>0 €</td>
<td>0 €</td>
</tr>
<tr>
<td>Other</td>
<td>50 €</td>
<td>0 €</td>
<td>0 €</td>
<td>20 €</td>
<td>30 €</td>
</tr>
<tr>
<td>Material expenses</td>
<td>1225 €</td>
<td>100 €</td>
<td>230 €</td>
<td>70 €</td>
<td>825 €</td>
</tr>
<tr>
<td>Fees</td>
<td>0 €</td>
<td>0 €</td>
<td>0 €</td>
<td>0 €</td>
<td>0 €</td>
</tr>
<tr>
<td>Total personnel costs</td>
<td>0 €</td>
<td>0 €</td>
<td>0 €</td>
<td>0 €</td>
<td>0 €</td>
</tr>
<tr>
<td>Total project costs</td>
<td>1225 €</td>
<td>100 €</td>
<td>230 €</td>
<td>70 €</td>
<td>825 €</td>
</tr>
</tbody>
</table>

REQuESTING FUNDS FROM DONORS

Invoicing with crowdfunding

With crowdfunding campaigns, regular reporting is important, e.g. online. On the one hand, this increases your own credibility, and on the other hand, your supporters want to share in the excitement and to know how everything is going.

In some countries like in Germany, income from crowdfunding is connected to the specific initiative and cannot be spent for other purposes. Some crowdfunding platforms don’t award the money raised unless the campaign reaches its desired sum!
INCOME

After you’ve accepted the conditions, your donors can dispense the funds. In some cases, you request a transfer or disbursement (an advance). Some donors want you to cover all the costs initially and will pay you after the complete invoicing. Others pay in installments.

If you want your funds to be available at the right point in time, you should plan for this ahead of time and request the funds a few weeks in advance, before you incur your first expenses. Often a request for funds takes some time to be processed. You may need to answer questions about the requested sum, for example, or the person responsible for distributing funds may be on vacation for three weeks.

EXPENSES

Receipts provide information about how money has been used. Ideally the planned expenditures that you listed in the approved cost overview and financing plan are exactly equal to the sum of all in the receipts for expenditures. Here, good financial planning pays for itself.

Many businesses don’t even issue receipts that describe how the money was spent. A book of blank receipts can be helpful in this regard. The receiver of funds – the salesperson or business owner – can sign the receipt. The person who spent the money keeps the original.

DOCUMENTATION AND INVOICING

All receipts for expenditures are separated according to type of costs and grouped together, attached to paper, numbered, and placed in the invoicing file. For every type of expenditure, you create a different receipt list on the computer and enter each receipt there.

At the end, you have to prove that you spent the money in the way it was approved by the sponsor. Often you have to provide lists of receipts, copies of the receipts, and a description of how the funds were used. An itemized list is an expenditure report that resembles the cost overview, only you enter in what you actually spent money on.

Documentation: Receipts are collected, affixed to paper, and supplied with notes: explanation, numbering, and, if necessary, an exchange rate.
**Info**

**KEEP YOUR CASH SEPARATE!**

Never combine your own money and the initiative's money in your wallet!

---

**Example**

**RECEIPT LIST FOR MEALS**

<table>
<thead>
<tr>
<th>Receipt #</th>
<th>Article description</th>
<th>Date</th>
<th>Location</th>
<th>Receipt #</th>
<th>Amount in (CZK)</th>
<th>Exchange rate to EUR</th>
<th>Amount in EUR</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Beverages</td>
<td>02/22/2012</td>
<td>Ostrava</td>
<td>12124.1</td>
<td>560</td>
<td>0,03691</td>
<td>20,67 €</td>
</tr>
<tr>
<td>2</td>
<td>Fruit</td>
<td>02/23/2002</td>
<td>Ostrava</td>
<td></td>
<td>120</td>
<td>0,03691</td>
<td>4,44 €</td>
</tr>
<tr>
<td>3</td>
<td>...</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Sum total</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td><strong>70,84 €</strong></td>
</tr>
</tbody>
</table>

Enter the receipt list into the computer and update it regularly. Each individual receipt is documented in one row.

---

**Example**

**ITEMIZED EXPENSES FOR A ONE-DAY EVENT**

<table>
<thead>
<tr>
<th></th>
<th>Total costs</th>
<th>Contributions from participants</th>
<th>Value of in-kind donations</th>
<th>Third-party funds</th>
<th>Granted funds from sponsor X</th>
<th>Invoiced funds from sponsor X</th>
<th>Difference</th>
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<tr>
<td>Space</td>
<td>224 €</td>
<td>0 €</td>
<td>100 €</td>
<td>0 €</td>
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<td>55 €</td>
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<td><strong>Material expenses total</strong></td>
<td><strong>1199,50 €</strong></td>
<td><strong>100 €</strong></td>
<td><strong>230 €</strong></td>
<td><strong>70 €</strong></td>
<td><strong>825 €</strong></td>
<td><strong>799,50 €</strong></td>
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<td>Personnel costs total</td>
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<tr>
<td><strong>Project costs</strong></td>
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<td><strong>100 €</strong></td>
<td><strong>230 €</strong></td>
<td><strong>70 €</strong></td>
<td><strong>825 €</strong></td>
<td><strong>799,50 €</strong></td>
<td><strong>25,50 €</strong></td>
</tr>
</tbody>
</table>

Explanation: The project spent a total of € 25.50 less than planned.
Many people probably dread accounting for this reason: they procrastinate for a long time before starting this work. Then they find themselves sitting in front of a mountain of receipts without being able to remember how they spent their money, and on top of all that they can’t find their last account statement...

Instead of taking that route, it’s very practical to create an organized filing system – one which doesn’t involve any fancy technology, but instead can be something as simple as a folder with several pockets, or a way of dividing papers into several different packets or marking them with sleeves that each represents a different cost category.

Secondly, you can also make entering receipt information into a database or pasting receipts into a book a fun activity if you pull your team together to do it as a group. It helps to have some good coffee or tea at hand – and with longer initiatives it’s best to do this twice or even several times throughout the duration of the project.

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**Info**

**ONE INVOICE FOR EVERYTHING, INSTEAD OF MANY INDIVIDUAL RECEIPTS**

When you receive multiple single receipts for the same purchase, for example admission tickets for cultural events, museums, bus tickets, etc, you can also ask for a *single receipt for the entire purchase* when you’re at the cashier's desk. Then you don't have to enter each individual receipt into the receipt list.

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**Info**

**RATE OF EXCHANGE DOCUMENTS**

If you work with multiple currencies, you have to document the exchange rate as well. You can find such documents online. You can also use a verifying document from an exchange office or a bank. If there are no major fluctuations in exchange rates, it might be best to use only one such document since it saves a lot of work in accounting.

**Online Sources**

You can find daily rates of exchange on the Internet at:

- www.ecb.europa.eu/stats/exchange
- www.oanda.com
**FINANCE GLOSSARY**

**Acquisition of goods**
Objects of value that are not consumed or used up, such as an electric kettle, a camera tripod, a suitcase.

**Funding or grant conditions**
These are rules for how and for what purpose funds may be spent.

**Grant or funding approval**
This is the donor’s announcement that they would like to support the project.

**In-kind or non-monetary contributions**
Everything that others give you or make available to you free of charge. The equivalent value of such a contribution is often estimated and entered as a monetary amount in the cost overview and financial plan:
- the value of the contribution, such as bread donated from the local bakery; seminar rooms that a university allows you to use, etc.
- the time that employees from associations, authorities, or other organizations spend volunteering for the initiative, often recorded in the form of an hourly or daily wage.

**Income receipts**
If you receive income from an element of your project, you have to create a receipt or invoice for yourself – an income receipt. One case in which you need an income receipt is if you host an event where there are entry fees that other people pay to the event organizer. Income receipts can take the form of handwritten receipts or copies of account statements on which the amount is documented.

**Itemized expenses**
The project’s expenditure report. This shows how the funds were actually spent in comparison to the planned amounts.

**Material expenses**
Is a general term for everything that is not part of personnel expenses.

**Personnel expenses**
These costs are often difficult for volunteer projects to take on. Non-voluntary institutions, for example, calculate the cost of their own work. Work contracts with individual experts are sometimes included under material expenses. For example, the production of a postcard is included in material expenses under “PR.”

**Personal contributions**
The resources brought in by the project team itself, e.g. a personal car or an existing Internet connection.

**Reallocation**
A request that some of the cost categories for which you have spent less than planned be reassigned to other cost categories. Reallocation does not entail an increase in the total sum of the awarded funds, only in the amounts of the various cost categories.

**Receipt for an expenditure**
You receive a receipt when you pay for something as a customer – these are expense receipts.

**Receipt lists**
Every individual receipt (or invoice) is listed and numbered according to date.

**Requesting a reallocation of funds**
A project team’s request to use funds differently than the way they were allocated in the cost overview and financial plan. This type of request must always be made before funds are disbursed.

**Request for disbursal of funds**
The project team’s request to the sponsor that funds be made available.

**Third-party funds**
Costs that are covered by other people or other organizations than the one to which you just applied. For example, if you request funds from the XY Foundation and the local government: for the XY Foundation, the funds from the local government are third party funds, and vice versa.
AN ACQUIRED TASTE?

Some dishes are so good you can’t wait to cook them again and again. Others are more of an interesting experiment, but not necessarily one you’re eager to try again. In the same way, a civic initiative is often either one of a kind, or else it’s just the first in a long series... In order to understand which of these you tend toward, you might conduct a personal review.

You should evaluate your own work anyway – the same way you do when you cook a meal. A good cook asks what’s missing, what would make the meal better next time – perhaps it should have started earlier, perhaps there should have been one more course, perhaps it might have been better with less parsley. In addition, the cook asks the guests how they like it and why.

EVALUATION

In determining which elements of your initiative to examine in this way, you should consider external requirements. For example the sponsor might want to receive a comprehensive final report. On the other hand, you should also take into account your own interests. It doesn’t matter whether you examine your own time management or the communication among team members; what’s important is to consider how satisfied you are with the final product and whether you adhered to your budget; evaluate your own gain in knowledge and the concrete impact on individual participants – the following questions are helpful when reflecting in this way:

Info

EVALUATION QUESTIONS

- Why did I achieve what I achieved?
- Why weren’t some things successful?
- Were there any unexpected outcomes?
- What did people who were not directly involved in the project say about me afterwards?
- What would I do differently next time?
- What should I pay attention to next time?

And when it comes to thinking about the next time: Is it exciting to think about doing a similar project again? After all, there are some dishes that you cook only once. But if it does seem exciting, what notes of your own would you add to the recipe for future use?
**HOW YOUR WORK CAN CONTINUE...**

No, I've had enough of DIY projects

In the future I can just be part of actions every once in a while, in places where I see a need, whether that's in my own immediate environment, in another initiative, or in clubs or organized groups...

I've realized that this is just my kind of thing. I just want to keep doing this kind of work.

I really enjoy working “for society”

I can imagine taking on training, a field of study, or a job position that has to do with my initiative's topic or methods...

I really want to continue working on this!

I want to repeat this initiative and make use of all the experience I've gathered the first time around. I can put all the ideas this project has inspired toward starting a business or a social organization.

Reflective Questions

Was this initiative really that important to me? How do I want to continue with this type of work? What suits me best, working with specific issues personally, or in a team?

Was this a great project, but how should I do it the next time around?

Does this initiative correspond to issues that are important to me personally? Do I want to make it a bigger movement? If so, how? What can I improve in terms of content, in terms of my own personal contribution, in terms of the team?

Reflective Questions

No, I've had enough of DIY projects

Reflective Questions
AND A LITTLE SOMETHING FOR THE ROAD...

THINK IN TERMS OF KEY QUESTIONS: WHO, WHY, WHAT, HOW, WHERE.


QUESTION YOUR OWN BEHAVIOR: WHY AM I DOING THIS? WHAT ARE MY PERCEPTIONS OF MY ENVIRONMENT?

BE HONEST WITH YOURSELF: IT DOESN’T HELP TO TAKE OTHERS’ ADVICE ONLY TO NOTICE FURTHER DOWN THE PATH THAT SOMETHING ISN’T SUITING YOU.

DON’T BE AFRAID TO ASK FOR HELP: CONSIDER WHETHER YOU NEED SUPPORT AND WHAT TYPE OF SUPPORT MIGHT BE HELPFUL.

PAY ATTENTION TO IMPACT RATHER THAN INNOVATION. IT’S NOT ABOUT FINDING MAGIC SOLUTIONS AND IMPRESSIVE INITIATIVES. INSTEAD, IT’S ABOUT MAKING SURE YOUR INITIATIVE AND YOUR APPROACH ARE EFFECTIVE.

TAKE A LOOK AT WHAT OTHER PEOPLE ARE DOING. YOU ALWAYS HAVE THE OPTION OF JOINING FORCES WITH EXISTING INITIATIVES, OF SUPPORTING THEM, AND LEARNING FROM THEM.

Info

PLANNING HOW TO CONTINUE

When you begin to plan subsequent activities, at the beginning you need to develop ideas and do detailed research. These questions can help you analyze the situation.

Environment

Is my initiative really necessary?

Concept

Can I reach my goal with my current methods, or do I need a new concept?

Impact

Does my initiative work? Am I reaching the goals I want to reach, or do I want to achieve something else? Would I achieve my goals in a more efficient or effective way if I used a different approach?

Funding opportunities

Are there long-term funding possibilities for this idea? Can I make money with this idea? Do I want to do that?

See you next time!
The Theodor-Heuss-Kolleg supports young people who want to shape society as active and responsible citizens. Our tools include seminars, trainings, support for volunteer initiatives, and guidance through mentoring. Our qualification concept concentrates on the personal development of the individual, the strengthening of social competencies, and the assumption of responsibility. We work with partners in local or transnational programs, and promote a culture of participation and active citizenship that is transparent, open, trusting, celebratory of diversity, equitable, and socially conscious.

The Theodor-Heuss-Kolleg is a program of the Robert Bosch Stiftung and MitOst e.V.

www.theodor-heuss-kolleg.de

Working Between Cultures offers trainings and consultations for universities, civil-society institutions, and businesses. Our work focuses on global diversity, communication, teamwork, and conflict resolution in intercultural settings.

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