



September 14, 1998

Mexican Regional Dance School

P.O. Box 50101

Palo Alto, CA 94303

804 Bell Street

East Palo Alto, CA 94303

(415) 322-1501

David and Lucile Packard Foundation

Ms. Barbara D. Kibbe

Program Officer

Organizational Effectiveness

300 Second Street, Suite 200

Los Altos, California 94022

Dear Ms Kibbe:

Enclosed is our Final Report covering grant 97-9147 received for the Needs Assessment project, which was headed by Ms Donna Young.

We thoroughly enjoyed our sessions with Ms Young and found the time spent to be profitable for our Board members. Of course, it is always a matter of positive growth and improvement to have consultants of the caliber of Ms Young guiding an organization such as ours in identifying strengths and weaknesses. This Needs Assessment exercise helped us to chart a course for the future, to feel better about our accomplishments and to imagine the future growth of our school.

We appreciate your kind support in helping us take this step and making it possible.

Sincerely,

A handwritten signature in cursive script, reading "Maria Elena P. Varela".

Maria Elena P. Varela

General Director

Needs Assessment -- Final Report

Project Overview

The project, a needs assessment survey, was begun in January 1998, and completed mid-June 1998.

The purpose of the project was to determine what resources and organizational structure Raices would need to found a dance school with its own facility.

The objectives of the project were to:

1. convert a general concept of the school into specific factors (facility size, location, curriculum, class fees, etc.)
2. determine what it might cost to establish and operate a dance school with its own facility
3. define the organizational infrastructure Raices would need to found a school
4. determine the associated financial costs of this infrastructure
5. better understand the logistics, commitment, and risks involved in this undertaking

Project Process

Raices hired a consultant who specializes in business planning and management to conduct the project. The project was divided into segments, and each board member volunteered to work on one or more segments. These smaller groups of board members met as needed to complete the project segments. All meetings were organized and facilitated by the consultant, who then documented the necessary information. The consultant compiled the needs assessment report, which was reviewed by all board members at a final meeting.

At the recommendation of the business planning and management consultant, a marketing consultant was hired to assist with development of the marketing plan portion of the report.

Project Accomplishment

The result of the project was a needs assessment report that includes the following elements:

- needs assessment summary
- statement of mission and goals
- organizational plan
- program plan
- financial plan
- school plan
- marketing plan
- planning calendar

The **needs assessment** section summarizes Raices':

- current position (strengths, resources, accomplishments)
- issues that need to be resolved in order for the organization to achieve its desired goals
- a brief summary of organizational, operational, and financial solutions to those issues

The **mission and goals** section states Raices' mission as an organization, long-term goals, and specific goals for 1998.

The **organizational plan** section defines the key persons needed in the next two years to effectively operate the organization (including the dance school) and what each person is to do. This plan outlines the staff members needed, their duties and responsibilities, staffing priorities, and an estimate of wage costs. Duties and responsibilities of executive board members, other defined positions (i.e.: Costume Manager, Technical Manager), and committees (i.e.: Fundraising Committee) are also documented here, as well as an organizational chart showing lines of authority.

The **program plan** section describes Raices' core programs, their purpose, which programs will be produced in 1998, and an ideal program calendar to implement in the future.

The **financial plan** section documents:

- the need for and use of a better financial accounting system and budgeting methodology
- an historical review of Raices' financial activities (funds raised and spent)
- a fundraising plan for 1998
- an overhead expense budget for 1998

The **school plan** documents:

- criteria for the school property (facility size, cost, etc.)
- planned location of the school
- proposed initial curriculum
- proposed class fees, payment terms and policies
- anticipated income statement for the first year of operations
- anticipated average monthly income statement (after first year)
- anticipated start-up costs for school
- demographic statistics of the planned location (to support student attendance assumptions)

The **marketing plan** summarizes marketing opportunities, challenges, resources (both available and needed), and specific goals for 1998.

The **planning calendar** visually captures all of Raices' activities in a calendar format. It shows deadlines for grant proposals, dance class sessions, board meetings, committee meetings, program dates, fundraising activity dates, operational planning deadlines.

The report is designed to be a working document. It is a reference tool to help board members better manage the organization, and may be used as a guideline for future planning. The entire report was provided on computer disk so that board members may readily edit the document as needed. The report's physical format, a binder with sections for the various plans, allows for easy updating.

Additionally, a financial accounting system has been implemented with the assistance of the business planning and management consultant.

In summary, Raices board members believe all project objectives were fully met.

Challenges and Concerns

The following challenges and concerns became apparent as a result of this project:

Raices needs to recruit board members with specific skills to facilitate its next stage of development. Board members who are experienced in financial management, fundraising, leadership, marketing, and volunteer recruitment are needed.

All board members will need to provide significant and consistent support, in terms of time and effort, throughout the school's founding stage. Insufficient or inconsistent board contribution would jeopardize the success of the school venture. Board participation needs to be treated as a professional commitment. This may be more of a commitment than current board members can make.

Existing board members are concerned about the long-term financial risks associated with the dance school, since the school is expected to have an ongoing operating loss. The facility lease puts still more financial risk and pressure on board members.

Lessons Learned

The school venture would require a transformation of the organization. Raices would have to operate more professionally; board planning and follow-through would be essential. The organization could no longer operate from program to program; instead, it must plan each year's goals and activities well in advance.

Raices needed to synchronize its operations with its mission and goals. Specifically, decisions regarding support of its performing group were not in keeping with the organization's primary concerns. This realization emphasized the importance of documenting a mission statement, long-term goals and short-term goals, and using these statements to focus efforts and provide guidelines for decisions.

Tools and Methods for Effectiveness

In the course of working on this project, Raices board members were introduced to several tools and methods to improve their organization's effectiveness:

Committees: Committees handle tasks so that a board can use its time to direct and manage. Everyone saves time in the long run, and more is accomplished.

"Meeting Master": A meeting needs to be lead by an individual who will drive the meeting to useful conclusions. A useful conclusion is either a decision or a task. All decisions must ultimately be translated into tasks. It is critical that a "Meeting Master" see that a task is assigned to a person for completion, and not simply identified.

Planning Calendar: This calendar visually summarizes all of the organization's activities and commitments for the year. It helps the board to manage the scope of the organization's commitments in relation to the time and human resources available. It prevents over-commitment and undue stress.

RAICES DE MEXICO
NEEDS ASSESSMENT & OPERATIONAL PLANS

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Introduction

Raices de Mexico has been an active organization for over 17 years, and is now at a critical stage in its growth. *Raices de Mexico* has reached a point where its current infrastructure cannot adequately support its programs and desire to grow. In order to reach the next level, *Raices de Mexico* must build its infrastructure and refine its operations. This process will require significant financial and human resources.

The purpose of this assessment is to define the financial and human resources needed, as well as support the conclusion.

In order to arrive at specific dollar figures and staff members needed, an operational plan for the future was created. The remaining sections of this report document this plan in detail, and show how dollar figures and staff needs were determined.

From here forward, *Raices de Mexico* will be abbreviated to *Raices* for greater ease in reading this report.

Current Position

Raices's current accomplishments, resources, and experiential knowledge are briefly summarized below.

Accomplishments

- supports classes that provide excellent instruction in Ballet Folklórico
- develops and presents a core of three, successful programs that promote community education and outreach, artistic development, and student performing
- invests in the purchase and maintenance of an extensive costume bank that authentically represents 15 regions of Mexico
- develops and supports a performing group of advanced dancers who are able to perform an expansive repertoire in a variety of settings, and who have received local acclaim
- operates a fiscally responsible organization and carries no debt

Resources

- a long-standing board of 9 directors who are devoted, capable and diverse community members
- an excellent reputation as an effective and responsible organization
- 3 talented instructors
- a supportive network of community leaders and foundations
- a committed core of 15 adult students

Knowledge

Raices knows...

- what kinds of programs are well received by their community and supported by foundations
- how to produce quality programs on limited budgets
- several ways to raise money with limited time, material and labor resources
- the characteristics, needs and resources of their students and audiences
- what ideas or tactics do *not* work in regards to class policies, class fees, fundraising ideas, proposal writing, organizational structure, etc. due to many years of experimentation

Issues

The following are observations about *Raices*'s infrastructure and operations:

Raices cannot adequately maintain nor expand its class offerings and student base without its own dance studio facility. Presently, *Raices* must secure studio space in facilities owned or managed by other organizations/institutions. The times and days when space is available for use by *Raices* are often inconvenient for their students. For example: Late afternoon on weekdays is the preferred time for children's classes, and early evening on weekdays are preferred for teen/adult classes. If the facility belongs to a dance organization, these preferred times are taken for their use. *Raices* is offered the remaining times. Also, the availability of facilities appropriate for dance instruction is very limited. The facility must have a raised, dance floor (to prevent injury to dancers), and be amenable to the wear caused by Folkloric footwork (which is percussive movement done in leather shoes). The result is that *Raices* has not been able to offer the variety of classes desired, at times and on days desired by its students. Consequently, the student base is small and on-going attendance irregular.

At this time, *Raices*'s financial books are not computerized with the use of financial software. Compiling financial data for grant proposals, grant reporting, monitoring budgets, and cash flow management is done manually, which is cumbersome and time-consuming. This impedes *Raices* from quickly responding to grant opportunities, and significantly burdens the board member who is doing the bookkeeping.

Raices' budgeting methodology is problematic. Program-related expenses are being treated as overhead expenses, such as the costs of class instruction (teacher fees and studio rental), insurance fees, costume purchases, etc. This categorization of program expenses adversely affects how these programs are fiscally managed. The method used to fund overhead expenses (attach a percentage to programs) is inexact and subject to failure if the program schedule is uncertain.

Some matters or tasks are not attended to as promptly and effectively as desired. Certain functions require specific skills, such as bookkeeping and grant proposal writing. Other functions require consistent and sizable time commitments, such as production management and secretarial duties. The organization suffers when sporadic or partial effort is given to these functions. The time commitment needed is more than can be reasonably expected of volunteer board members.

Currently, a few board members handle most of the work. No guidelines were given to newer board members as to how they might best contribute. Although job descriptions and an organizational chart were created several years ago, these were not fully implemented, nor are they currently referred to. Leadership is ambiguous. Board meetings do not have a regular schedule (such as the first Tuesday of the month) which impairs full attendance. These board meetings are used to tackle projects on the task level as well as to make management decisions, resulting in inefficient use of board members' time.

Because board member's efforts are consumed with keeping up with current matters, the planning process is neglected. There is no established time in the year for planning the next year's goals, programs, budgets, and fundraising activities. Without formal, consistent planning, *Raices* operates without clear goals and outcomes are uncertain.

Summary Of Needs

The following is a summary of needs and recommendations. These conclusions are discussed and supported in detail by the remainder of this report.

Organizational Needs Refer to report section titled:

- a school facility School Plan
- an accounting system Financial Plan
- staff persons..... Organizational Plan
- an organizational structure..... Organizational Plan

Operational Recommendations Refer to report section titled:

- change budgeting methodology Financial Plan
- assign jobs to board members Organizational Plan
- increase volunteer participation Organizational Plan
- implement a planning calendar Planning Calendar
- document mission and goals Mission & Goals
- document a program plan Program Plan
- document a fundraising plan Financial Plan
- document a marketing plan Marketing Plan

The highest priority is to secure funds for a school facility and operations.

Funds Needed For School Year 1 Refer to report section titled:

- \$ 36,700 school facility start-up School Plan
- \$ 20,500 for School Manager Organizational Plan & School Plan
- \$ 20,500 for Executive Director Organizational Plan

Funds Needed For School Year 2 Refer to report section titled:

- \$ 21,350 part-time School Manager Organizational Plan & School Plan
- \$ 21,350 part-time Executive Director Organizational Plan

Given the commitment *Raices* would be making in hiring staff and signing a lease agreement (a 3-year lease is likely), it is recommended that *Raices* seek a 3-year funding commitment, if possible.

RAICES DE MEXICO
MISSION STATEMENT

The mission of *Raices de Mexico* is to develop and promote the rich heritage of the mexican community through quality instruction and performances of high artistic, cultural and educational value.

Using dance as the principal means of accomplishing its mission, *Raices de Mexico* enhances the lives of participants and spectators alike.

RAICES DE MEXICO 1998 GOALS

Program Development

- Increase attendance in children classes
- Improve the quality of music used in performances by obtaining digitized music recordings and transferring to CD's
- Develop audiences by:
 - pursuing publicity opportunities on a timely basis by producing and forwarding press releases two months prior to performances
 - increasing paid advertising (radio, newspaper) for performances
 - distributing flyers for future shows at each performance, and mailing show flyers to those on mailing list on a timely basis
- Improve content/format of Educational Show, and prepare for production in 1999

Fiscal Development

- Raise \$12,000 to compensate Executive Director
- Raise \$1,500 to compensate Bookkeeper
- Raise \$3,000 for "Community Show" at McKinley School
- Raise \$2,000 for "Artistic Show" at Mountain View Center for the Performing Arts
- Raise \$5,000 to \$8,600 for general, operating expenses
- Establish break-even budgets for all shows (ticket sales equal to expenses)
- Revise class fee policy for adult, performing classes so as to break even (tuition receipts equal class expenses)
- Secure 3-year funding commitment for school

Organizational Development

- Hire a part-time Executive Director
- Hire a Bookkeeper (independent contractor)
- Create a data base for grants and funders
- Establish these committees with membership: Fundraising, Marketing, School Development
- Clarify and document expectations of board members, then produce an introduction packet for prospective members and board manual for active members
- Consistently hold monthly board meetings and schedule meetings well in advance
- Clarify executive board positions and other staff-type positions with written "job descriptions" and fill all positions
- Develop a marketing plan for how to build student base at school
- Implement a planning calendar that establishes:
 - when next year's program content and budgets must be completed
 - when fundraising plan must be completed
 - when any other operational plans and budget must be completed
- Add committee volunteers and board members, particularly to include skills in accounting, tax, marketing, and finance

RAICES DE MEXICO
LONG TERM GOALS

- Build and maintain a dance academy that is regionally recognized for quality and diversified instruction
- Develop and sustain a performing company that is regionally recognized for artistic quality and accomplishments
- Produce events that focus on education, artistic development, and community development
- Develop teachers and performers by sponsoring their artistic/professional education
- Promote exposure to cutting-edge techniques through workshops, artistic development of instructors, and a diverse repertoire
- Expand and maintain collection of audio/visual equipment, costumes and stage props, as well as archives of choreography, music, and historical research
- Establish a central facility for:
 - administrative and management staff
 - board of director meetings
 - all files, supplies, equipment and archives
 - dance classes
 - performing company rehearsals (and perhaps studio shows)
- Seek funds to assist low-income students (scholarship fund)
- Seek funds to support a full-time managerial, administrative and educational staff
- Develop an audience base that financially supports performances by regular attendance, and is demographically diverse (representative of the community at large)

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Introduction

Raices has designed an organizational structure that meets the requirements of its bylaws, serves its operational needs, and provides board members with defined roles and opportunities to contribute.

Staff

It was determined that the following positions or tasks cannot be handled adequately by volunteer efforts given the scope of *Raices*'s current and near-future operations:

- Executive Director
- Development Director
- School Manager
- administrative tasks (see document titled “**Executive Secretary**”)
- accounting tasks (see document titled “**Executive Treasurer**”)

Presuming that funding will not allow *Raices* to fill all of these positions at once with paid staff, *Raices* has prioritized their needs as shown below:

- Bookkeeper (independent contractor) - to handle accounting tasks
- Executive Director
- School Manager
- Development Director
- Administrative Assistant - to handle administrative tasks

The anticipated sequence of hire is as follows:

- | | |
|---------------------------|---|
| <u>Phase I</u> - 1998 | hire Bookkeeper
hire part-time Executive Director |
| <u>Phase II</u> - 1999 ? | hire full-time Executive Director/School Manager |
| <u>Phase III</u> - 2000 ? | hire full-time Development Director |
| <u>Phase IV</u> - 2??? | hire full-time School Manager
hire full-time Executive Director
hire part-time Administrative Assistant |

The document titled “**Organizational Chart Phase I**” shows the relationship between all positions and committees.

Raices will be challenged to adequately handle the Development Director functions and administrative tasks until funding allows for paid staff. The Fundraising Committee will

assume the responsibilities of the Development Director for 1998, which will significantly burden its members. Also, the organization is in need of professional fund development skills. The administrative tasks will be handled collectively by the Executive Secretary and the Executive Director. This, too, is a stressful arrangement that will be difficult to maintain over the long term.

Two other positions will be filled by either board members or volunteers: Costume Manager and Technical Manager.

The responsibilities of executive board members, Executive Director, Development Director, Costume Manager, Technical Manager, School Manager are outlined on separate documents at the end of this report section. It should be noted that these job descriptions may need to be revised with the addition of a committee, or staff member.

Committees

The Board of Directors will establish the Fundraising, School Development, and Marketing Committees immediately. Committees are to operate much like the Board of Directors. They will:

- meet at least once per month on a regular schedule (same day of month, time and place)
- select a chairperson, secretary, and substitute
- maintain an agenda and record minutes

The chairperson is to maintain the committee agenda and preside over meetings. The secretary is to record and distribute minutes, and notify committee members of meeting changes, etc. The substitute fills in for either the chairperson or secretary, as needed.

As soon as *Raices* is able to increase volunteer participation, and possibly add board members, the Artistic & Program Committee will be added. Eventually, the Volunteer and Board Development Committees may be added.

A description of the committees' responsibilities are outlined on the document titled "Committee Responsibilities".

Fiscal Impact

Three organizational phases are anticipated with the following financial impact:

<u>Phase I</u> - 1998	Bookkeeper	\$ 1,500
	Executive Director (part-time)	\$ 12,000
	<u>Total Cost</u>	<u>\$ 13,500</u>

<u>Phase II</u> - 1999 ?	Bookkeeper	\$ 2,400
	<u>Executive Director/School Manger</u>	<u>\$ 41,000</u>
	Total Cost	\$ 43,400
<u>Phase III</u> - 2000 ?	Bookkeeper	\$ 2,400
	Executive Director/School Manager	\$ 42,700
	<u>Development Director</u>	<u>\$ 42,700</u>
	Total Cost	\$ 87,800

The document titled “**Staff Compensation Cost Analysis**” shows assumptions behind these staff costs.

Supporting Documents

- Staff Compensation Cost Analysis
- Organizational Chart Phase I
- Job Descriptions: Executive President
 Executive Secretary
 Executive Treasurer
 Executive Director
 Development Director
 Costume Manager
 Technical Manager
 School Manager
 Committee Responsibilities

RAICES DE MEXICO
STAFF COMPENSATION COST ANALYSIS

PART-TIME EXECUTIVE DIRECTOR:

GROSS WAGES	10,350	FULL TIME OR 40 HRS/WK @ \$16.83/HR
PAYROLL TAXES	1,554	APPROX. 8.45% OF GROSS + 9.7% OF FIRST \$7K
WORKER'S COMPENSATION	<u>104</u>	APPROX. 1% OF GROSS WAGES
TOTAL COST	<u><u>\$12,007</u></u>	

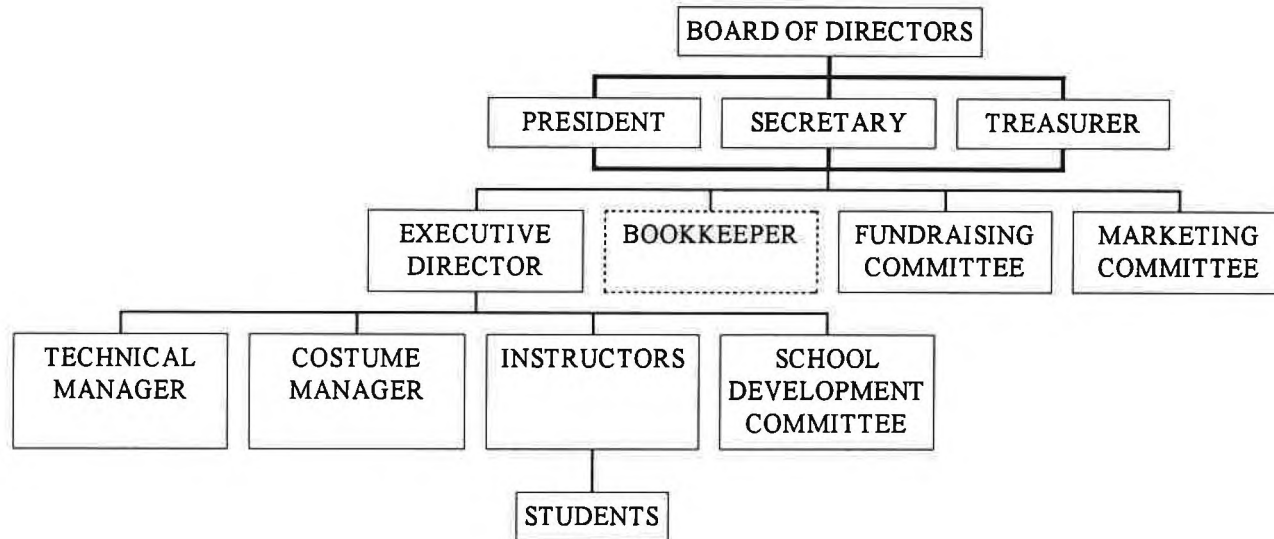
FULL-TIME EXECUTIVE DIRECTOR/SCHOOL MANAGER (FIRST YEAR):

GROSS WAGES	35,000	FULL TIME OR 40 HRS/WK @ \$16.83/HR
PAYROLL TAXES	3,637	APPROX. 8.45% OF GROSS + 9.7% OF FIRST \$7K
WORKER'S COMPENSATION	350	APPROX. 1% OF GROSS WAGES
MEDICAL & DENTAL BENEFIT	<u>1,800</u>	\$150/MONTH
TOTAL COST	<u><u>\$40,787</u></u>	

FULL-TIME EXECUTIVE DIRECTOR/SCHOOL MANAGER (SECOND YEAR):

GROSS WAGES	36,750	FULL TIME OR 40 HRS/WK @ \$16.83/HR
PAYROLL TAXES	3,784	APPROX. 8.45% OF GROSS + 9.7% OF FIRST \$7K
WORKER'S COMPENSATION	368	APPROX. 1% OF GROSS WAGES
MEDICAL & DENTAL BENEFIT	<u>1,800</u>	\$150/MONTH
TOTAL COST	<u><u>\$42,702</u></u>	

RAICES DE MEXICO
ORGANIZATIONAL CHART - PHASE I



RAICES DE MEXICO
EXECUTIVE PRESIDENT

- Supervises the activities of the officers (executive board members) and any staff members reporting directly to the board
- Determines agenda and presides over board meetings
- Executes contracts, checks, and any other legal/financial documents in the name of *Raices de Mexico*
- Controls the affairs of *Raices de Mexico* by coordinating and facilitating efforts of officers, board members and committees
- Manages board development efforts
- Oversees *Raices de Mexico*'s policies for board members and operations, and ensures compliance
- Acts as *Raices de Mexico* spokesperson and actively promotes *Raices de Mexico* by building public relations, securing publicity, and participating in any other promotional activities
- Initiates and manages planning processes, including development and revision of long and short term goals
- Makes sure that *Raices de Mexico*'s activities and plans are in keeping with its mission statement
- Maintains the new board member packet and board manual, making revisions as needed

RAICES DE MEXICO
EXECUTIVE SECRETARY

- Certifies and keeps a current, original *or* copy of Bylaws at *Raices de Mexico's* principal office
- Keeps a book of minutes of all meetings (board and committee) at *Raices de Mexico's* principal office and makes these available as reasonably requested
- Sees that board meeting notices are given in accordance with the Bylaws
- Acts as custodian of records and of seal of corporation, and sees that seal is affixed to all executed documents

The following tasks may be handled personally or be overseen by Executive Secretary (and handled by a staff person):

- Records and distributes board meeting minutes
- Maintains of *Raices de Mexico's* planning calendar (includes dates for board meetings, program events, fundraising events, planning deadlines, etc.)
- Handles meeting logistics (arranges for meeting place, distributes agenda, secures any equipment or supplies needed, arranges for refreshments, etc.)
- Maintains *Raices de Mexico's* document files (both computer and hard copy)
- Types documents as needed that may include: budget notes, correspondence, contracts
- Maintains mailing list
- Maintains office supplies inventory and office equipment

RAICES DE MEXICO
EXECUTIVE TREASURER

- Acts as custodian and is responsible for all funds and securities of *Raices de Mexico*
- Deposits funds in bank in the name of *Raices de Mexico*
- Assures that adequate and correct financial accounts of *Raices de Mexico*'s properties and business transactions are kept and maintained (either personally attend to this or oversee a bookkeeper), including:
 - receiving and giving receipt for monies due to *Raices de Mexico* (i.e.: class fees, ticket sales)
 - disbursing *Raices de Mexico*'s funds upon receipt of proper vouchers (i.e.: invoices)
- Oversees *Raices de Mexico*'s accounting methods and practices
- Keeps financial records and at *Raices de Mexico*'s principal office and makes these records available for review as reasonably requested
- Informs the board of *Raices de Mexico*'s financial transactions and condition as requested by the board
- Prepares and certifies (or arranges for preparation and certification of) financial statements
- Sees that *Raices de Mexico* submits appropriate and correct tax reports as required by law, and either gives or obtains qualified tax advice as needed
- Manages *Raices de Mexico*'s cash flow
- Manages the development and adherence to *Raices de Mexico*'s overall budget

RAICES DE MEXICO
EXECUTIVE DIRECTOR

- Manages all aspects of *Raices de Mexico* 's programs* , which includes:
 - conceptualization and development
 - organization and execution of production tasks
 - budget development and adherence to budget
 - marketing strategy and tasks

- * Programs includes shows, special events (except for fundraisers) and classes (until a school facility is opened).

- Negotiates contracts with teachers, performers, facilities, and other professionals needed for programs on behalf of *Raices de Mexico*

- Supervises Costume Manager, Technical Manager, and School Manager

- Maintains a data base of performing professionals, technicians, facilities and resources related to performance production

- Presides over Artistic & Program Committee

RAICES DE MEXICO
DEVELOPMENT DIRECTOR

- Maintains data base of foundations and grants
- Builds and maintains relationships with foundations, and other sources of funds
- Presides over Fundraising Committee
- Develops concept and budget for fundraising projects/campaigns, and coordinates logistics with Fundraising Committee
- Writes proposals for securing funds, and follow-up reports as required by grant
- Develops fundraising strategy
- Actively promotes *Raices de Mexico* by building public relations, securing publicity, and participating in any other promotional activities

RAICES DE MEXICO
COSTUME MANAGER

- **Manages costume inventory:**
 - keeps track of location, count and condition of items
 - attends to cleaning, repair and replacement of items
 - notifies Executive Director of funds needed to maintain, repair or replace items

- **Manages costume needs for performances:**
 - determines costume needs for each dance for performances
 - makes necessary arrangements to have the needed costumes ready for the performances
 - makes sure performers are informed of what their costumes are for each dance, how to secure costume, how to wear and care for costume, and when/where to return costume

RAICES DE MEXICO
TECHNICAL MANAGER

- **Manages A/V and prop needs for performances:**
 - determines technical needs (lighting and sound equipment, music, props, technicians) and advises Executive Director of any logistical issues and costs
 - makes necessary arrangements (purchase, rental, contract, construction) for equipment, technicians, music recordings, props
 - oversees A/V and prop coordination during and at close of performances

- **Manages A/V equipment and stage prop inventory:**
 - keeps track of location, count and condition of items
 - notifies Executive Director of funds needed to maintain, repair or replace items
 - attends to maintenance, repair and replacement of items

RAICES DE MEXICO SCHOOL MANAGER

- Manages school finances:
 - Accounts for receipt, deposit, and disbursement of monies
 - Develops budget and assures adherence to budget
- Keeps Executive Director informed of school's activities and operations as requested by the board
- Assists in school marketing efforts (development and implementation) by participating in Marketing Committee
- Manages school curriculum
- Manages school communications (mailings, postings)
- Hires and supervises school staff (teachers) and any contracted help (janitor)
- Acts as school representative to general public, and actively promotes school within community
- Attends to any student, parent, and teacher needs as they may arise on site during class times, and attends to facility maintenance when needed
- Makes necessary arrangements if a substitute teacher is needed, and/or communicates to students of class cancellations or schedule changes
- Maintains school data base of students, teachers, and maintenance services
- Maintains school files (computer and hard copy) and updates operational forms (class schedule, class fee schedule, statement of school policies, etc.) as needed
- Handles daily operations tasks:
 - Opens studio
 - Collects student fees
 - Signs in students before class
 - Answers telephone
 - Processes mail
 - Responds to inquiries
 - Enrolls new students
 - Reconciles cash receipts for class fees and drop in safe
 - Closes studio
- Maintains janitorial and office supplies
- Oversees property and equipment maintenance

RAICES DE MEXICO **COMMITTEE RESPONSIBILITIES**

Fundraising Committee

Develops and implements the annual fundraising plan to meet fiscal (funds) goal established by Board of Directors. Implementation may involve soliciting funds by campaign, soliciting funds individually, and holding fundraising events. Responsible for creating and adhering to budgets for each event. This committee supports the Development Director's efforts.

School Development Committee

Develops plan for school based on guidelines and goals established by Board of Directors and Executive Director. Once funding is secured, handles all tasks up to point of opening school including finding suitable facility, managing lease negotiations, managing any construction and purchases needed to prepare school for operation. This committee will be dissolved once the school is opened.

Marketing Committee

Develops and implements a comprehensive marketing plan for all of Raices de Mexico's programs and general promotion of organization.

Artistic & Program Committee

Develops the annual program plan and establishes artistic guidelines and goals. This committee supports the Executive Director's efforts.

Volunteer Committee

Builds and maintains a core of volunteers to assist with the myriad of tasks involved in program implementation, fundraising, and general administration.

Board Development Committee

Builds and maintains contact with community members who may become board members in the future should new members be needed. Solicits the participation of these community members in committees as a means for establishing an initial relationship. This committee supports the efforts of the Executive President.

Core Programs

The following describes *Raices'* core programs:

Ballet Folklorico Instruction: Over the years, *Raices* has offered excellent instruction in Ballet Folklorico to all age groups and skill levels. The current class offerings comprise of one children's class, and two classes for the adult, performing group. This limited schedule of classes is a reflection of the facility issues discussed in the ASSESSMENT section of this report.

Community Show: The purpose of this show is to give all *Raices* students a performing opportunity while providing lower-income community members a chance to see Ballet Folklorico at a reasonable price. The majority of the audience is Hispanic (about 90%), and is comprised of community members who live locally to theater and family/friends of the student performers.

Artistic Show: The purpose of this show is to present the highest artistic achievement possible that features *Raices'* adult, performing group. The audience is primarily non-Hispanic (about 60%), formally educated (college level or higher), affluent, and has a strong interest in the arts. The audience is drawn from several municipalities surrounding the theater location.

Educational Show: The purpose of this show is to introduce Ballet Folklorico to an audience that is unfamiliar with the art. The audience is a 50/50 mix of Hispanic and non-Hispanic and represents a variety of socio-economic groups. The audience is drawn from community members who live locally to the theater.

1998 Programs

In 1998, *Raices* will produce the Community Show, the Artistic Show, and continue offering the existing children and adult classes. *Raices* will focus on increasing attendance in the children's class. Classes will be added upon sufficient demand (student revenues must cover class expenses). *Raices* will also invest time in further improvement of the Educational Show, and prepare it for production in 1999.

Fiscal Impact

No significant, financial investments are planned for 1998 shows. Shows will present established repertory and rely on existing costumes. *Raices* primary concern in 1998 is to secure funding for a school facility (see SCHOOL PLAN section of this report). Show budgets will be designed to break even with earned income (ticket sales), and produce profit to offset organizational costs if program grants are secured.

RAICES DE MEXICO

IDEAL PROGRAM CALENDAR

PROGRAMS	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC
COMMUNITY SHOW		X — X										
EDUCATIONAL SHOW				X — X								
ARTISTIC SHOW (2 PER YEAR)						X				X — X		
BALLET FOLKLORICO INSTRUCTION:												
SESSION 1									BEGINS	▶ ENDS		
SESSION 2	BEGINS	▶ ENDS										
SESSION 3 "SUMMER WORKSHOP"						BEGINS	▶ ENDS					

Accounting System

Raices will implement a computerized accounting system to simplify bookkeeping and provide accurate reporting as needed. Reports will be used to: write grant proposals, write grant reports, track budgets, manage cash flow, file tax reports. The chart of accounts will be revised so as capture data in a format that is more conducive to grant writing and general management, while still meeting accepted accounting principles.

A Bookkeeper will be hired as an independent contractor at an hourly rate of \$25/hour. *Raices* will try to hire a Bookkeeper with non-profit experience, which requires specific treatment of designated funds. It is believed that it will take about 5 hours per month to do the bookkeeping for *Raices*' current operations. If the school is opened, an additional 3 hours of bookkeeping may be needed (8 hours per month).

Budgeting Methodology

Raices will no longer treat the expenses associated with the adult, performing group classes as overhead expenses. This method prevented *Raices* from having a clear picture of the cost of this program. Instead, expenses (and revenues) related to this program will be tracked separately as is done with other programs, such as shows.

Program budgets will include all direct expenses, which are any expenses incurred solely for the purpose of producing those programs. Since capital reserves are limited, a more conservative approach will be taken in developing program budgets. *Raices* will develop break-even budgets for all programs; anticipated revenues will carry a high level of certainty due to historical experience and *Raices*' degree of control in securing revenues (such as show ticket sales). Program grant moneys that have not been secured will be targeted for discretionary expenses; in the event that grant moneys are not received, these discretionary expenses are readily eliminated without impairing the integrity of the program.

A separate budget will be developed for overhead expenses, which are any expenses not related to a program (see document titled "**1998 Budget For Overhead Expenses**"). Funding for these expenses may come from program profit, fundraising activities, or securing grant moneys for this purpose.

Each fundraising event will also have its own budget to help assure that these events generate the net revenues expected.

Fiscal Summary

Assuming break-even budgets for programs, *Raices* needs to raise funds in 1998 as follows:

	<u>No Conference</u>	<u>Mexico Conference Included</u>
Bookkeeper	\$ 1,500	\$ 1,500
Executive Director (part-time)	\$ 12,000	\$ 12,000
<u>Overhead Expenses</u>	<u>\$ 5,000</u>	<u>\$ 8,600</u>
Total Funds Needed	\$ 18,500	\$ 22,100

Raices plans to raise these funds as follows:

Fundraising Activities	\$ 6,600
Program Grant Moneys	\$ 5,000
<u>Organizational Grant Moneys</u>	<u>\$ 12,700</u>
Total Funds To Be Raised	\$ 24,300

Refer to document titled “**1998 Fundraising Plan**” for specific sources of funds.

The positive difference of \$5,800 between funds needed (excluding Mexico Conference) and funds to be raised allows for the fact that not all grants will be awarded. It also gives *Raices* a margin of error in case expectations of fundraising activities are overly optimistic. This margin is reduced to \$2,200 if *Raices* decides to participate in the Mexico Conference. The document titled “**Historical Financial Summary**” shows how *Raices* has historically achieved similar levels of funding.

Supporting Documents

- 1998 Budget For Overhead Expenses
- 1998 Fundraising Plan
- Historical Financial Summary

RAICES DE MEXICO
1998 BUDGET FOR OVERHEAD EXPENSES

<u>DESCRIPTION</u>	<u>AMOUNT</u>	<u>NOTES</u>
BANKING	150	\$12.50/month
TELECOMMUNICATIONS	600	\$50/month
OFFICE SUPPLIES	600	\$50/month
POSTAGE (not program related)	240	\$20/month
COPY & PRINT (not program related)	300	\$25/month
SUBSCRIPTIONS	60	
EQUIPMENT:		
PURCHASE	1,300	laser printer \$500, audio recorder \$800
MAINTENANCE	400	repairs
LEGAL & PROFESSIONAL FEES	300	
TRAVEL (transportation, lodging, meals)	300	mileage reimbursement
ENTERTAINMENT	250	
MARKETING (not program specific)	500	
TOTAL "A"	<u>\$5,000</u>	
SEMINARS & CONFERENCES	2,500	Conference in Mexico
TRAVEL (transportation, lodging, meals)	1,100	additional for Conference in Mexico
TOTAL "B"	<u>\$8,600</u>	

RAICES DE MEXICO
1998 FUNDRAISING PLAN

	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	TOTAL
FUNDRAISING ACTIVITIES:													
TAMALES SALE			1,500										1,500
BENEFIT DINNER				700									700
CINCO DE MAYO PRESENTATIONS					400								400
SOLICITATION LETTER						500							500
4TH OF JULY FLOAT							500						500
SNO-CONE BOOTH (2 DAYS)							500						500
SNO-CONE BOOTH (2 DAYS)								500					500
SOLICITATION LETTER									500				500
TAMALES SALE											1,500		1,500
PROGRAM GRANTS:													
SANTA CLARA ARTS COUNCIL													2,000
PHILANTHROPIC VENTURES													1,500
REDWOOD CITY CULTURAL COMMISSION													1,500
ORGANIZATIONAL GRANTS:													
CALIFORNIA ARTS COUNCIL (CAC)													2,700
SAN FRANCISCO FOUNDATION													2,500
PENINSULA COMMUNITY FOUNDATION													1,500
FLEISHACKER													2,500
PAGE FOUNDATION													1,000
BAY MEADOWS													2,500
TOTALS	0	0	1,500	700	400	500	1,000	500	500	0	1,500	0	\$24,300
NOTE: DOLLAR AMOUNTS GENERATED BY FUNDRAISING ACTIVITIES ARE NET OF EXPENSES.													

RAICES DE MEXICO
HISTORICAL FINANCIAL SUMMARY

	1994	1995	1996	1997
INCOME:				
CONTRIBUTED	24,449	30,263	8,230	20,956
EARNED	14,861	14,871	11,546	11,932
TOTAL INCOME	39,310	45,135	19,776	32,888
EXPENSES:				
PERSONNEL	14,460	18,930	10,771	11,399
OPERATING	18,618	22,056	18,785	19,322
TOTAL EXPENSES	33,078	40,986	29,555	30,721
PROFIT OR LOSS	6,232	4,149	(9,779)	2,167

Introduction

Raices desires to establish a school for Ballet Folklorico in their own facility so as to expand class curriculum and student base.

Facility Criteria

After consideration of needs and associated costs, it was determined that *Raices* can afford minimum needs only at this time. The facility must meet the following minimum criteria:

- 1,300 square feet total
- rental rate not exceed \$1.50/square foot (or about \$2,000/month)
- 900 square feet for dance area
- one bathroom
- good ventilation
- meet city parking requirements
- be in a safe area
- have adequate, outside lighting for nighttime

The remaining square footage will be used to create a reception counter, an office area, a janitorial storage closet, a storage area for costumes and equipment, and, if possible, a dressing area. If a lower rental rate is secured, then the total square footage may be increased (provided total rent does not exceed \$2,000/month).

Additional criteria that is desired, but not critical, is the following:

- be near public transport (bus, train)
- be in a dynamic commercial zone with foot traffic
- have substantial parking
- be zoned for chosen activity

Because of the effort and potential costs of applying for a use permit, it is preferred to secure a facility in those zone areas where a dance studio is a permitted use.

Location

Redwood City was chosen as the most suitable site in San Mateo County because it has:

- a large population of Hispanic families
- relatively plentiful and affordable real estate opportunities
- several, suitable performance venues (theaters)
- a receptive and supportive city government
- proximity to current operations (convenient for current student base)

Raices's core community is Hispanic; 1990 census statistics show that Redwood City has a large and growing Hispanic population (see **Demographic Summary** later in this section). Redwood City has two zones where a dance studio would be a permitted use:

Operations

The spreadsheet titled **“Proposed School Curriculum For First Year”** shows the initial class offerings and expected attendance, revenues, and cost to student. The average attendance levels are supported by Redwood City’s demographics (see **Demographic Summary** later in this section).

The document titled **“Proposed School Class Fees, Terms & Policies”** shows standard fees, discounts, terms, and policies. Class fees were based on careful consideration of the core community’s ability to pay and comparable services. Assuming an average household income of \$35,000 per year, a monthly cost of \$68 (8 classes) per student is deemed reasonable (see **Demographic Summary** later in this section). Comparable services are shown below:

<u>School Name</u>	<u>Type of Dance</u>	<u>Location</u>	<u>Class Fees (8 classes)</u>
Los Lupenos	Ballet Folklorico	San Jose	\$ 56 - \$84 per month
Studio S	Jazz/Ballet/Tap	Redwood City	\$ 81 per month

The document titled **“Proposed School Class Schedule For First Year”** gives a visual picture of the class schedule, and is based on the proposed curriculum. It also shows how much time the space will not be used initially (this under-utilization is common for dance studios). This time is viewed as potential revenue if the space can be lawfully sublet.

The spreadsheet titled **“Anticipated School Income Statement For First Year, By Month”** shows revenues and expenses anticipated for the first year. These figures are based on the following assumptions:

- school will operate 47 weeks out the year (closed for 5 weeks)
- teacher fees will be \$18/class (whether class is 1, 1-1/2 or 2 hours in length)
- it will take 12 months to reach average attendance levels
- it will take 9 months to fully implement the initial curriculum

The tuition figures reflect the anticipated rate of increase in attendance (from 30% in first month to 100% by 12th month). The instructor expense figures reflect the anticipated rate of increase in class offerings (from 50% in first month to 100% by 9th month). Average attendance levels are based on experience and a casual survey of a local school (14 students attended a 4:00 PM jazz class on a Thursday at Studio S in Redwood City). The rent expense figure is based on research of current property rates (actual rentals available and consultation with commercial Realtor) and minimum square footage needs. All other expenses were based on casual research with potential suppliers or on best-guesses.

It should be noted that the “**Anticipated School Income Statement For First Year, By Month**” does *not include* the cost of a school manager. *Raices* plans to economically combine the Executive Director position with the School Manager position, since the duties are interrelated and together the positions warrant full-time employment. When the school expands its operations and increases revenue opportunities, a full-time School Manager may be necessary and financially feasible. Additional revenue opportunities may include: additional classes, studio rental fees (paid by other dance/exercise enterprises), snack and beverage vending machine sales.

There are potential expenses that are not considered in the “**Anticipated School Income Statement For First Year, By Month**”. The school may need to purchase dance props for instructional use, such as hats or skirts. There would also be maintenance and replacement costs associated with these props. Also, the school may have a monthly loan payment, if start-up costs are covered with borrowed capital.

Demographic Summary

Demographic statistics were collected to support the viability of a school in Redwood City. *Raices* determined the following about its current student base:

- primarily Hispanic origin (approximately 90%)
- primarily women (approximately 70%)
- primarily adult (over 18 years)

Raices believes that the Hispanic population will always show the greatest interest in *Raices*, which is one of the reasons why Redwood City was selected as a school site. However, their long-term goal is to reach a broader section of the community at large. *Raices*'s intention is to shift the percentages of Hispanic/Non-Hispanic students from 90/10 to 70% Hispanic and 30% Non-Hispanic over time. *Raices* plans to increase the attendance of male students by effectively marketing to that population, and by offering more artistic material that appeals to men (rhythmic dances involving footwork versus lyrical dances). The current predominance of adult students is believed to be a reflection of when classes are now offered (late evenings weekdays and late afternoon on Saturdays). These class times are not convenient for younger students. *Raices* is confident that the number of children and teen students will increase dramatically because late afternoon and early evening classes are made available to them.

The following statistics were obtained in the 1990 census, unless noted otherwise.

Hispanic Population of Redwood City:

15,919 people (24% of total population of Redwood City)¹
 15,935 people (24% “ “ “ “ “ “)²

Mexican Population of Redwood City:

10,607 people (16% of total population of Redwood City)³
 11,139 people (17% “ “ “ “ “ “ ”)⁴

Hispanic Population of San Mateo County:

114,627 people (18% of total population of San Mateo County)⁵

Mexican Population of San Mateo County:

65,058 people (10% of total population of San Mateo County)⁶

Population of 6 to 13 Year Olds in Redwood City:

5,740 people...3,074 males & 2,666 females (8.6% of Redwood City population)⁷

Population of 14 to 18 Year Olds in Redwood City:

3,237 people...1,625 males & 1,612 females (4.9% of Redwood City population)⁸

A quickly growing sector of Redwood City’s population is the preschool age group (0 to 4 years); this sector has risen almost 50% since 1980.⁹

The average median age of Redwood City’s population is younger by almost two years than that of San Mateo County as a whole.¹⁰

Population of 5 to 17 Year Olds in San Mateo County:

97,693 people (15% of total population in San Mateo County)¹¹

Annual Income Per Capita in 1989 in Redwood City: \$ 20,292 ¹²

Annual Median Household Income in 1989 in Redwood City: \$ 42,962 ¹³

Annual Mean Household Income in 1990 in Redwood City by Area:¹⁴

Lowest:	Downtown Area	\$ 31,846
Next Lowest:	Port Area	\$ 35,842
Third Lowest:	Central/Palm Area	\$ 39,462

Given these statistics, *Raices* believes that students can afford to pay \$64/month on average, or less than \$700/year. These statistics also support Raices anticipated, ongoing student base of 35 children, 10 teen, and 35 adult students (totaling 80 students).

Fiscal Impact

The document titled “**Potential Start-Up Costs For School**” lists potential start-up costs based on an “as is” lease arrangement (no sharing of capital improvement costs between tenant and landlord). This is likely to be the case given the rental rate *Raices* can afford. An assessment of the resources needed to build a school produced these conclusions:

<u>Expenses</u>	<u>Amount</u>	<u>Reference Document</u>
Start-up costs	\$ 20,000	“ Potential Start-Up Costs For School ”
Operating Losses	\$ 16,700	“ Anticipated School Income Statement For First Year, By Month ”
Staff Cost Allocation	<u>\$ 20,500</u>	“ Staff Compensation Cost Analysis ” (see <u>ORGANIZATIONAL PLAN</u> section)

Total Funds Needed \$ 57,200

A best-guess was used to determine the most likely capital improvements, since the particular issues posed by the final site selected are unknown. Some figures for purchases were based on research with local vendors/suppliers.

It is believed that the school will not be self-supporting even when average attendance levels are reached. The document titled “**Anticipated Average Monthly Income Statement for School**” shows a break-even scenario *without* the cost of a school manager, and a loss of about \$1,500 per month with the staff cost allocation. Outside funding will be needed on an ongoing basis to pay for management. It is estimated that *Raices* will need between \$15,000 to \$20,000 annually to support the school.

Overall costs for a three phases are summarized below:

<u>Phase I</u> - 1998	School Development	\$ 0
<u>Phase II</u> - 1999?	Start-Up Costs	\$ 20,000
	Operating Loss	\$ 17,500
	<u>Staff Cost Allocation</u>	<u>\$ 20,500</u>
	Total Cost	\$ 58,000
<u>Phase III</u> - 2000?	Operating Profit	\$ (1,500)
	<u>Staff Cost Allocation</u>	<u>\$ 21,350</u>
	Total Cost	\$ 19,850

Supporting Documents

- Proposed School Curriculum For First Year

- Proposed School Class Schedule for First Year
- Proposed School Class Fees, Terms & Policies
- Anticipated School Income Statement for First Year, By Month
- Anticipated Monthly Average Income Statement For School
- Anticipated Start-Up Costs For School

ENDNOTES

- ¹State of California: ABAG Regional Data Center, 1990 Census STF3, State: California, County: San Mateo, Place: Redwood City (California: self-published, 1992) 1.
- ²Horner, Edith R., California Cities, Towns, & Counties: Basic Data Profiles for all Municipalities & Counties 1997 (California: Information Publications, 1997) 334.
- ³State of California: ABAG Regional Data Center 1.
- ⁴Horner 334.
- ⁵Horner 517.
- ⁶Horner 517.
- ⁷State of California: ABAG Regional Data Center 1.
- ⁸State of California: ABAG Regional Data Center 1.
- ⁹Redwood City Community Development Department: Planning Division, 1990 U.S. Census Data Summary (California: self-published, 1992) 11.
- ¹⁰Redwood City Community Development Department: Planning Division 11.
- ¹¹Horner 517.
- ¹²Horner 334.
- ¹³Horner 334
- ¹⁴Redwood City Community Development Department: Planning Division 11.

RAICES DE MEXICO
PROPOSED SCHOOL CURRICULUM FOR FIRST YEAR

CLASS NAME	CLASS CODE	CLASS LENGTH (HOURS)	# TIMES PER WEEK	MAXIMUM # STUDENTS	AVERAGE # IN CLASS	AVERAGE CLASS FEE PER STUDENT	AVERAGE REVENUE PER CLASS	AVERAGE REVENUE PER MONTH	AVERAGE COST/MONTH FOR STUDENT
FOLKLORIC									
TECHNIQUE & CHOREOGRAPHY:									
CHILDREN BEGINNING I	A	1	2	10	8	8.00	64.00	501.76	62.72
CHILDREN BEGINNING II	B	1.5	2	10	8	8.00	64.00	501.76	62.72
CHILDREN INTERMEDIATE	C	1.5	2	10	8	8.00	64.00	501.76	62.72
TEEN BEGINNING	D	1.5	2	10	8	8.00	64.00	501.76	62.72
ADULT BEGINNING	E	1.5	2	15	8	8.50	68.00	533.12	66.64
ADULT INTERMEDIATE & ADVANCED	F	2	2	15	10	8.00	80.00	627.20	62.72
SPECIFICS:									
FALDEO	G	1	1	20	10	8.00	80.00	313.60	31.36
PERFORMANCE:									
INTERMEDIATE & ADVANCED REPERTORY	H	2	2	20	15	6.00	90.00	705.60	47.04
OTHER									
CHILDREN BEGINNING BALLET	I	1.5	1	10	8	8.00	64.00	250.88	31.36
TOTAL CLASSES PER WEEK			16						
GROSS REVENUES PER MONTH								4,437.44	
INSTRUCTOR FEES PER MONTH (TOTAL CLASSES PER WEEK TIMES \$18/CLASS TIMES 3.92 WEEKS PER MONTH)								1,128.96	
NET REVENUES PER MONTH								3,308.48	

RAICES DE MEXICO

PROPOSED SCHOOL CLASS SCHEDULE FOR FIRST YEAR

TIME	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY	SUNDAY
9:00 - 9:30							
9:30 - 10:00						I	
10:00 - 10:30						I	
10:30 - 11:00						I	
11:00 - 11:30						G	
11:30 - 12:00						G	
12:00 - 12:30						H	
12:30 - 1:00						H	
1:00 - 1:30						H	
1:30 - 2:00						H	
2:00 - 2:30							
2:30 - 3:00							
3:00 - 3:30							
3:30 - 4:00	A		A				
4:00 - 4:30	A	B	A	B			
4:30 - 5:00	C	B	C	B			
5:00 - 5:30	C	B	C	B			
5:30 - 6:00	C	D	C	D			
6:00 - 6:30		D		D			
6:30 - 7:00	E	D	E	D			
7:00 - 7:30	E	F	E	F			
7:30 - 8:00	E	F	E	F			
8:00 - 8:30		F		F			
8:30 - 9:00		F		F			
9:00 - 9:30							
9:30 - 10:00							
CLASS CODE INDEX:							
A	CHILDREN BEGINNING I				M/W	3:30 PM - 4:30 PM	
B	CHILDREN BEGINNING II				T/TH	4:00 PM - 5:30 PM	
C	CHILDREN INTERMEDIATE				M/W	4:30 PM - 6:00 PM	
D	TEEN BEGINNING				T/TH	5:30 PM - 7:00 PM	
E	ADULT BEGINNING				M/W	6:30 PM - 8:00 PM	
F	ADULT INTERMEDIATE & ADVANCED				T/TH	7:00 PM - 9:00 PM	
G	FALDEO				SAT	11:00 AM - 12:00 PM	
H	INTERMEDIATE & ADVANCED REPERTORY				SAT	12:00 PM - 2:00 PM	
I	CHILDREN BEGINNING BALLET				SAT	9:30 AM - 11:00 AM	

RAICES DE MEXICO

ANTICIPATED SCHOOL INCOME STATEMENT FOR FIRST YEAR, BY MONTH

MONTH:	1	2	3	4	5	6	7	8	9	10	11	12	TOTAL
INCOME:													
% OF AVERAGE (SEE NOTE 1)	30%	35%	35%	40%	45%	50%	58%	66%	75%	83%	92%	100%	
TUITION	1,331	1,553	1,553	1,775	1,997	2,219	2,573	2,928	3,328	3,683	4,082	4,437	31,458
EXPENSES:													
INSTRUCTORS (SEE NOTE 2)	565	565	565	565	847	847	847	847	1,129	1,129	1,129	1,129	10,161
RENT	1,950	1,950	1,950	1,950	1,950	1,950	1,950	1,950	1,950	1,950	1,950	1,950	23,400
UTILITIES:													
GAS & ELECTRIC	50	50	50	50	50	50	50	50	50	50	50	50	600
WATER & SEWAGE	50	50	50	50	50	50	50	50	50	50	50	50	600
GARBAGE	50	50	50	50	50	50	50	50	50	50	50	50	600
TELECOMMUNICATIONS:													
TELEPHONE	100	100	100	100	100	100	100	100	100	100	100	100	1,200
ON-LINE SERVICE	20	20	20	20	20	20	20	20	20	20	20	20	240
INSURANCE:													
GENERAL LIABILITY	125	125	125	125	125	125	125	125	125	125	125	125	1,500
WORKER'S COMPENSATION	11	11	11	11	17	17	17	17	23	23	23	23	203
PROFESSIONAL SERVICES:													
BOOKKEEPER	125	125	125	125	125	125	125	125	125	125	125	125	1,500
JANITOR	240	240	240	240	240	240	240	240	240	240	240	240	2,880
SUPPLIES:													
OFFICE	75	75	75	75	75	75	75	75	75	75	75	75	900
JANITORIAL	60	60	60	60	60	60	60	60	60	60	60	60	720
EQUIPMENT:													
PURCHASE	125	125	125	125	125	125	125	125	125	125	125	125	1,500
MAINTENANCE	35	35	35	35	35	35	35	35	35	35	35	35	420
MISC. MAINTENANCE	25	25	25	25	25	25	25	25	25	25	25	25	300
ADVERTISING	100	100	100	100	100	100	100	100	100	100	100	100	1,200
TRAVEL REIMBURSEMENT	17	17	17	17	17	17	17	17	17	17	17	17	204
EXPENSE SUBTOTAL	3,723	3,723	3,723	3,723	4,011	4,011	4,011	4,011	4,299	4,299	4,299	4,299	48,128
PROFIT OR LOSS	(2,392)	(2,170)	(2,170)	(1,948)	(2,014)	(1,792)	(1,437)	(1,082)	(971)	(616)	(217)	138	(16,670)

NOTE 1: MONTH 12 FIGURES REPRESENT AVERAGE REVENUES AND EXPENSES ANTICIPATED IN FUTURE

NOTE 2: FULL COMPLIMENT OF CLASSES NOT OFFERED UNTIL MONTH 9 (1ST 4 MONTHS = 50%, 2ND 4 MONTHS = 75%, LAST 4 MONTHS = 100%)

RAICES DE MEXICO
ANTICIPATED AVERAGE MONTHLY INCOME STATEMENT FOR SCHOOL

	<u>PER MONTH</u>	<u>ASSUMPTIONS</u>
INCOME:		
TUITION	4,437	see "Proposed School Curriculum For First Year"
EXPENSES:		
INSTRUCTORS	1,129	see "Proposed School Curriculum For First Year"
RENT	1,950	1,300 sq' @ \$1.50/sq'
UTILITIES:		
GAS & ELECTRIC	50	
WATER & SEWAGE	50	
GARBAGE	50	
TELECOMMUNICATIONS:		
TELEPHONE	100	
ON-LINE SERVICE	20	No web page
INSURANCE:		
GENERAL LIABILITY	125	\$1,500/yr
WORKER'S COMPENSATION	23	teachers @ 2% wages
PROFESSIONAL SERVICES:		
BOOKKEEPER	125	5 hrs/month @ \$25/hr
JANITOR	240	\$20/visit-3 visits/wk-12 visits /mo
SUPPLIES:		
OFFICE	75	
JANITORIAL	60	\$15/wk
EQUIPMENT:		
PURCHASE	125	\$1,500/yr-for office or studio
MAINTENANCE	35	\$420/yr
MISC. MAINTENANCE	25	\$300/yr-ie: plumber
ADVERTISING	100	\$1,200/yr
TRAVEL REIMBURSEMENT	17	50 miles @ 33+cents/mile reimbursement to whomever runs errands for supplies, etc.
EXPENSE SUBTOTAL	\$4,299	
P&L WITHOUT MANAGEMENT	\$138	
STAFF ALLOCATION	\$1,708	includes payroll taxes & worker's comp
P&L WITH MANAGEMENT	(\$1,570)	

ADDITIONAL REVENUE CONSIDERATIONS:

vending machine sales
space sub-rentals (need to look into liability/insurance issues)

ADDITIONAL COST CONSIDERATIONS:

loan payment (capital improvement loan)
dance props (purchase, maintenance, replacement)

RAICES DE MEXICO
ANTICIPATED START-UP COSTS FOR SCHOOL

Lease Deposit (one month rent deposit)	\$ 2,000
Capital Improvements:	
Mirrors (materials, delivery, installation)	\$ 4,000
Dance Floor (900 sq' plyboard on rubber cells & Marley covering)	\$ 3,000
Acoustic Paneling	\$?
Painting (materials only)	\$ 150
Lighting	\$?
Carpentry:	\$?
Dressing Room	
Reception Counter	
Janitorial Storage Cabinet (enclosed shelves)	
Costume, Prop & A/V Equipment Storage Area	
Telephone Lines Installation	\$ 500
Equipment, Furniture & Fixtures:	
Signage	\$?
Stereo Equipment:	\$ 1,500
Amplifier (includes receiver), Woofer, 2 Speakers	
Dual Cassette Deck	
CD Player	
Turn Table	
Office Furniture:	\$ 1,000
Desk	
Chair	
File Cabinet	
Shelves	
Office Equipment:	\$?
Telephone	
Printing Calculator	
Copy Machine	
Computer Hardware (all components)	
Computer Software	
Other Equipment:	\$?
Fan(s)	
Space Heater	
Drop Safe	\$ 600
TOTAL (estimated)	\$20,000

RAICES will hire a marketing and communications consultant during 1998 to help them develop a marketing plan. The two pressing needs are:

- to strengthen their current marketing efforts to increase show audiences (use of media)
- to develop their marketing strategy and mechanisms to reach potential students for the school

There is also a need to assess, and possibly rework, existing marketing collateral. *RAICES* needs a comprehensive collection of communication tools that reflects the organization's character and mission, and that effectively promotes the overall development of the organization.

RAICES DE MEXICO –THE MARKETING PLAN

Current Marketing Situation: Where are you now?

1. Background of the Organization
2. The External Environment: Opportunities & threats facing the organization (over which you have little or no control) *or think about as a whole which can be good or negative but can be used as a springboard to get publicity*
3. The Internal Environment: Internal strengths and weaknesses (over which you have control)

*How you look at yr plans. (By laws may be changed)
" yr " at yr needs.*

Marketing Goals and Objectives: Where do you want to go?

1. Do the goals and objectives fit with the organization's overall mission or purpose?
2. Are the marketing goals specific and unambiguous?
3. Do the goals recognize the current situation of the organization?
4. Do they fit the organization's external and internal environment and opportunities?

Marketing Strategy: How do you want to get there?

1. Have you identified your target markets and audiences?
2. Will the marketing strategy achieve the marketing goals and objectives?
3. What is the budget for the organization for the time period of this marketing plan? Are there adequate resources available (e.g., financial, staff, space?)

Action Plan: What, Who, and When

1. What Action Tools have you chosen?
2. Who will use them?
3. When will they be used?

THE PITCH LETTER

*do not write "Dear Editor"
set their name*

The "pitch" letter is used solely to gain attention from the media. Something wonderful or newsworthy or historic will be happening at your organization and you want the media – an experienced writer, editor, broadcaster or producer – to cover it...or your organization itself. A pitch letter differs from a press release in one very important way. When writing a press release, you are ultimately writing to the viewing/listening/reading public. When writing a pitch letter, the media themselves are your public. You are trying to convince the media to write an article or story about your event, or perhaps a series of stories on your organization.

A pitch letter may stand on its own merits. It may set the stage for a follow-up phone call. It may be an introduction and cover letter for enclosed material about your group. It may, in fact, be all of these things. A well-written pitch letter is as important as the well-written story you hope to see, because a well-received pitch letter may result in the long-term interest of the media in your mission. And unless your letter does its job, there will be no story -- well-written or otherwise.

Good pitch letters are interesting, natural and honest. Good pitch letters use short, clear sentences in conversational language and tone. While you may indulge in more stylistic writing in a pitch letter than in a news release, the same "simple-is-best" principles apply to both. In general, the "inverted pyramid" (most important facts first) form still applies, but you may "spice up" your pitch with an exceptionally interesting quote or observation at the very beginning. The first paragraph may be clever or matter-of-fact, funny or serious, but it must make the editor want to read the rest of the letter. The pertinent "who, what, when, where, why and how" of your subject are then expressed in order of importance. Include a suggestion or invitation to gain action from the reader.

The first thing to know is when a pitch letter is appropriate. **Use the pitch letter wisely.** A phone call may be better if the journalist is already familiar with you and your organization. Don't squander the journalist's time (and possibly turn him/her off to you in the future) by pitching a non-story. Try, as you always should when dealing with the press, to look at the prospective story with the eyes of the outsider. You and your organization may be very excited about opening a new office, but how captivating will this story be to the reader?

Take the time and trouble to carefully target your reader. Since this is in letter-form, his/her name will appear on the letter. Don't destroy the personal effect of the letter by beginning with "Dear Editor." And, as always, **make sure that person still works at the station or office.** Sending mail to an ex-employee is a perfect way to reach an ultimately disinterested reader.

How you approach each proposal can make the difference in an article in the magazine and your pitch letter in the trash can. Be familiar with the "beat" (types of stories covered) by the writer-reporter. Know that paper's or station's audience. Don't be shy about telling the reader (writer-reporter) why this story would be of interest to his/her readers or viewers.

Don't pitch the same story to competing publications or programs; Check and recheck your spelling and grammar, and always indicate that you will be contacting the reader in a short time. A sample pitch letter follows.

VILLA MONTALVO

Montalvo Association
a nonprofit corporation

March 1, 1996

Executive Director
Elisbeth J. Challener

Jerry Ceppos
Managing Editor
San Jose Mercury News
750 Ridder Park Drive
San Jose, CA 95190

Board of Trustees

President
Sally S. Lucas

First Vice President
Scott Sherwood

Dear Jerry,

Second Vice President
Carolyn L. Rosen

Vice President
Long Range Planning
Phillip R. Boyce

Secretary
Timothy A. Wilkens

Treasurer
Joseon Maglione

Past President
J. Michael Patterson

Lionel M. Allan
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S. Gregory Davies
James L. Dawson
Jennifer DiNapoli
Tracey A. Enfantino
Sandra Farris
Truman L. Gates
A. Claire Jinks
Carmen M. Johnson
Robert L. LoPresto
James Masuda, D.D.S.
William J. Murphy
Perry V. Olson
Alan R. Pinn
Gloria Piro
Fawn Powers, Ph.D.
Flor Shea
Marta A. Trobough

Emeritus

Michael H. Antonacci
James R. Compton
Olivia C. Davies
Jean Kuhn Doyle
Margaret Dyer
Warren B. Heid
John S. Langwill
RAdm. Ralph M. Metcalf
William C. Randal
Britton W. Saterlee
Bernard Sims
Betty Speer

Ex Officio

Hon. Dianne McKenna
Santa Clara County Supervisor
Ann Marie Burger
Mayor of Saratoga

Six year old Ethan (not his real name) has been expelled from more schools than he has had birthdays. Sometimes he bites his classmates. Other times he sits wrapped in silence, just staring for hours. As a last ditch effort from his frustrated parents, he has come to **San Jose's Zonta Services**, a private, nonprofit agency providing individualized programs for children with severe emotional problems.

A few decades ago, people like wheel-chair confined Martha (not her real name) would have remained at home or been institutionalized to endure the monotonous and unproductive days of those with developmental disabilities. But at **Hope Rehabilitation Services**, clients like Martha learn self-esteem and practical skills that enable them to earn a living at many of Silicon Valley's most successful corporations.

Villa Montalvo has joined forces with the business community to begin a ground-breaking new program to broaden the horizons of people like Ethan and Martha *The 1996 Artshop Project*, funded by the Hewlett-Packard Company, will be a weekly series of hands-on workshops held at Hope Rehabilitation and Zonta Services. The workshops will run from April to July and will use the visual and performing arts to provide a means of expression for disabled children, teenagers and seniors -- expression that many of us take for granted. Workshops will be lead by art therapists. Clinical staff from Hope Rehabilitation and Zonta Services will supervise. The three months will end with an exhibition of the workshop art at the Gallery at Montalvo.

Jerry, in these times of governmental "belt-tightening," this project is a newsworthy example of the community funding its own social service efforts, and could be a wonderful story for Merc readers. It would also be a visually compelling photo story. I would love to work on a photo story or layout with you. Let's talk soon. Hope all is well.

Cheers,

Toni Stone

15400 Montalvo Road
PO Box 158
Saratoga, CA 95071-0158
408/741-3421
FAX: 408/741-5592

THE PRESS RELEASE

goes to media

Press releases (or news releases) are a primary tool used by public relations professionals to give their audiences information via the media. In order for the media to act as effective messengers for that information, the press release needs to be in a style which the media understand.

Press releases are written in the same style as news stories -- the "reverse pyramid" style -- that is, the most important facts first, the explanation next and the examples and least important information last. There is a very practical reason for the form: Both electronic and print media have a scarce resource called time. This is expressed in space in print media and seconds and minutes in print media. An editor under a time constraint may simply read the first half of a news release and transfer that information into a brief news story. By placing the facts you consider most important at the beginning of your release, you stand a much better chance of the story saying what you want it to say.

The Headline: Your headline should both grab the reader and serve as a succinct synopsis of your story.

The Lead: The first paragraph of the release is known as the lead. The lead should contain the **who, what, when and where** of your story. In addition to providing the basics of your story, your lead needs to be captivating as well; it is the hook to get the editor interested in reading and running your story. Keep the lead brief -- under five or six lines. Many editors receiving hundreds of releases weekly have only 30 seconds or so to read the headline and the lead.

The Body: The next paragraph after the lead should state **why** and when applicable, the **how** of your story.

Quotations: Quotations provide a news outlet with a "human interest" touch to your story, add interest and offer a format from which to express a point of view not normally expressed in the impartial body of the press release. In addition, a well-selected quotation can add legitimacy and serve as a testimonial when coming from a person of authority. Never start the release with a quote, but use it to "flesh out" your story.

Dates: The most important date in the release is the release date. This date tells the editor when to pass the story to the public. Make the editor's task simple. **"FOR IMMEDIATE RELEASE"** tells the editor to use the story right away. A specific release date in the future should be used only if the appearance of the story must happen before or after a specified date. Specifically-dates releases run some risk of your story's being ignored because the editor has not remembered to pull the story out and use it on that future date.

The Dateline: The dateline includes the date on which the release was written and the city of origin of the release. While not always necessary, cities of origin are most often used when an organization has several offices or wants to stress the release locale.
Press Release formatting follows.

THE PUBLIC SERVICE ANNOUNCEMENT (PSA)

*your words as you want the
announcer to ~~see~~ read it*

Public Service Announcements, or PSAs, are usually used verbatim. As you write your PSA, imagine someone on radio or television actually reading it aloud. PSAs are generally quite short and have an approximate time or "read-time" on them suggesting the amount of time needed to read them. These times are particularly important in electronic media, because they are actually read aloud by an announcer. Times may vary, but the standard times accepted by media are 10, 15, 20 and 30 seconds long. While newsrooms have computers that actually time news copy, you can approximate, by reading yours and timing it. Be honest. You will gain nothing by calling a two minute PSA a 30 second PSA just to try to get it accepted for on-air reading! Remember to write these as though you are speaking directly to the audience. It is perfectly fine, therefore to write, "you are invited to the first Bay Area appearance by...." PSAs are also used commonly for inclusion in "Community Calendars," those free listings in print media. Once again, these calendar items are only a few lines long, so "write short!" The formats for PSAs vary greatly, but generally follow the formats of press releases:

Type and double space all information. Include phonetic pronunciations ("Ray-dee-oh") on all unusual or foreign names and phrases.

Include the Who, What, When and Where.

Include a phone number for the public to call for further details. Remember, the PSA is short, so use your time to sell your event. Ask them to call your number for more information.

Because PSAs are often taped and inserted into shows at a later time, they often require a longer lead time. It is best, as with all media relations work, to find out the time required of each station or publication you are interested in.

STANDARD RELEASE FORMAT

Margins should be 1" to 1 ½" on all sides to allow editors room for notes.

Address of sender: In the upper left corner; includes sender's contact. This is the name, address and phone numbers the press can use to gain further information. The organization's name and address can be in the form of letterhead.

Release date: In the upper left corner. Depending on your need, it can say "**FOR IMMEDIATE RELEASE,**" "**RELEASE AT WILL,**" or more specifically, "**FOR RELEASE SEPT. 23 at 10:00 AM or THEREAFTER.**"

Headline: Beneath the release date, can be centered or flush left. Should be in ALL CAPS.

Dateline: If used, begins the first paragraph. Example – "**San Jose, June 16, 1996**" – then the release begins.

Body: Begins about 1/3 the way down the page. It is double spaced. Signify the end with one of these designations: **-end-; -30-; or ###.** If there is more (a second page) to come, signify this with **-more-** and then end with one of the above.

Length/Content: KEEP IT SHORT AS POSSIBLE. One-pagers are far better than two-pagers, which may be ignored or used inefficiently. Be as brief as you can, while including all necessary information. Choose concise, simple sentences. Use active tense. If a short word will do, use it. Avoid adjectives and adverbs. Remember to end with the name and phone numbers the public may use to gain more information, buy tickets, etc. Be careful;;this is not necessarily the same name as that in the address of sender or contact name.

CLEAR; CONCISE; CORRECT: Check and check again for spelling, typographical errors and the correct names and addresses. An added way of checking your release is to have someone not associated with the story read it. If the information is clear to them, the public will understand it. A sample Press Release follows.



Press Contact: Toni Stone
408/371-3180
FAX: 408/741-5592

MEDIA ALERT

- WHO:** Asian Heritage Council of the Bay Area
- WHAT:** AHC will hold a "Hiroshima Remembered" marathon of specially-commissioned performance pieces in remembrance of the 170,000 Japanese citizens killed during the bombings of Hiroshima and Nagasaki on August 6, 1945. Pieces will range from poetry, modern and traditional Japanese dance, and a jazz cantata composed for 100 local singers -- all the children and grandchildren of those who survived the bombings.
- WHERE:** On the streets of downtown San Jose, California
- WHEN:** August 6, 1995, beginning at 8:15 a.m., the exact time the bomb was dropped over the city of Hiroshima.
- NOTE:** This important 50th anniversary of an event considered by some to be an atrocity and by others an act of necessity will be punctuated by speeches from both local Japanese-American dignitaries and celebrities and internationally-known politicians, performers and activists.

#####

THE MEDIA ALERT

*it is faxed to news desk
- telling them today come down today
to cover this event - not used
for performances*

The Media Alert – also known as the News Advisory or News Announcement – is one of the most effective media action tools, if used properly. The Media Alert is a very short announcement to the media, asking them to cover an event. Media Alerts are particularly useful for press conferences, publicity “stunts,” political rallies, demonstrations or last-minute appearances by celebrities. The format for this important tool is the simplest of any media tool. It is most effective to follow literally the “who, what, when, where” of the subject of your announcement. This method for contacting the media differs tremendously from all other press contact tools. Media Alerts are most effective when faxed directly to the publication’s newsroom or station’s assignment desk. Early every morning, the newspaper editors and station producers gather to discuss the day’s “budget,” which is the way they will allocate their photographers, video operators and reporters. This decision is based on knowledge of upcoming events. Much of this information is obtained by reading the “wire,” UPI, AP or local wires such as Bay City News, which all list listings of the day’s upcoming public events. Such picturesque and compelling events are not always easy to plan for in advance and frustrated professionals usually end up frantically calling their camera people and dispatching them to the scene of an event with very little preparation. By faxing your Media Alert directly into the newsroom, you are actually helping them avoid this last-minute scramble AND helping publicize your event. While it may seem troublesome to send a fax late the night before your event or at 6:00 or 7:00 the morning of the event, successful coverage will make the effort worth it. **ONE NOTE OF CAUTION:** Be sure that the person whose name and phone number appears in the “contact” portion of the alert is available to receive calls from interested press. If media is interested in covering the event, they will often call to get additional information and confirmation. As will all media tools, the Media Alert should be used only when appropriate. Do not clutter the newsroom faxes with alerts on the day your performance opens. That’s what your press releases, PSAs and calendar items sent many days before are for. Media Alerts should be used only for one-time public events that have “hard news” or pictorial (sensational) value. A sample Media Alert follows.

THE MEDIA CALENDAR

*decide what tools
you will use for what
purpose*

As an Action Tool, your Media Calendar should be a strategically planned and specific document that helps you use the media to publicize your organization and its events. Your Calendar should include:

1. The specific media tool to be used – PSAs, press releases, media alerts, calls to the editor,
2. The appropriate internal document, such as Annual Report, Newsletter, Fundraising document,
3. Dated deadlines for those tools (with the name of the person accomplishing the task, if possible),
4. “Mini-Deadlines” that specify all the mid-point steps in preparation that make those large deadlines possible, and
5. Any important dates which may impact on your preparation time, such as performances, vacation dates, postal holidays, other grant deadlines, etc.

The easiest way to create your Media Calendar is to simply insert all your deadlines and names on a blank monthly calendar (although there are a number of excellent and expensive computer programs that would help you). Calendaring is usually done in reverse order – by first inserting the event or task in its proper date.

Working backward, decide when (how much time before the actual event) you want your audience to learn of this event. This time will vary according to the type of tool you are creating and knowledge of your audience:

- If, for instance, your goal is to use a calendar insertion in a magazine to publicize your event, you must first find how much time in advance (lead time) that magazine requires to consider printing your announcement. (It is, therefore, suggested you do some planning by calling them up or using any of the printed Media Guides -- such as the one that follows -- to gather this important data.
- If, on the other hand, the tool is an announcement mailed directly to your potential ticket buyers' homes, you must allow time for your audience to read the announcement and plan to buy tickets in advance.
- Similarly, if the tool contains a card to be filled out and mailed back to you, you must allow for that time.

Mailing considerations: Again, working backward, decide how much time it will take for your tool to arrive at your audience's site. A bulk mailing to your audiences' homes will require up to ten days' mailing time on the part of the post office. Don't forget to add the additional amount of time needed for your organization to prepare your tool for bulk mailing. The post office has quite specific requirements for zip code order, counted and weighted items, etc. Consult your local post office ahead of time for these requirements. You may decide that all the extra processing time, on your part, is not worth the savings bulk mailing provides. **Exception:** The Media Alert requires only the time it takes to fax it to the newsroom. For all other tools, **be generous in your time allowance.**

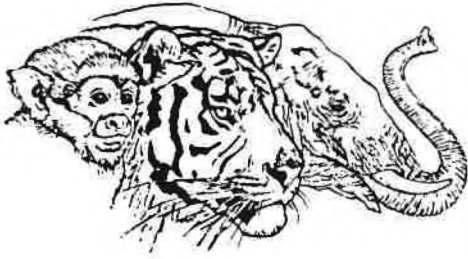
Next, you want to allow enough time for the preparation of your tool for mailing. This “production calendar” can be a fairly simple series of preparations, such as 1) typing a pitch letter and 2) stuffing it into an envelope. Printed collateral such as a brochure is created through a complicated series of mini-preparations that involve 1) designing and editing that first draft

coming from your printer, 2) resubmitting the brochure with your suggested changes, 3) again looking at the final draft (often called a "blueline,"), 4) resubmitting that final product and 5) awaiting time for it to be printed by your chosen printer and delivered to you! To effectively calendar schedule the whole process, from start to finish, you must assign an appropriate amount of time for each step along the way. **Note: If you are using the services of an outside contractor, such as a printer or designer (or the post office, for that matter), ask them how much time their participation will take – that is the time you will insert into the appropriate step in your production calendar.**

Before you even get to the point of having your tool printed, you must have an idea of what you want. This can often be the most time-consuming preparation period. This period involves meeting to discuss and

confirm the general contents of your tool, assessing your supply of visual components, such as photos. If you want photos, and you do not have what you want, your hard decision is to 1) take the time to shoot some photographs or 2) re-think your project. **Do not use second-rate visuals just because you cannot take the time to get the pictures you want!** Lastly, take the time to discuss HONESTLY your budget. There is no sense to invent an unrealistic budget if you face running out of money before your project is finished. **Again, be generous in your time allowance. Assume that all these planning sessions and meetings with suppliers may be postponed and rescheduled, and that, once started, will take longer than you planned. When first creating your media calendar, include more steps than you think you need, just to get used to the process.**

A valuable Media Guide, with information on deadlines and format used by Bay Area radio and television stations follows. Use this or others as a guide for your media plans. And remember to make updates, as names or programs change. Good Luck to You!



THE OAKLAND ZOO

in Knowland Park
P.O. Box 5238
9777 Golf Links Road
Oakland, California 94605
(415) 632-9525
FAX (415) 635-5719

FOR IMMEDIATE RELEASE
August 5, 1991

CONTACT: Toni Stone
Public Relations Director
Phone 632-9525

ZOOFARI BENEFIT FOR THE OAKLAND ZOO (PSA - 50 seconds)

Grab your Khakis and trek to "Zoofari," the Oakland Zoo's 4th Annual Benefit Dinner and Silent Auction on September 19 at 6 p.m. This year's safari-style event will feature African music, dance and storytelling, as well as cocktails and elegant full-course dining. "Zoofari" benefits the African Lion Exhibit and will be held at the Zoo's Snow Building, high a-top Knowland Park.

And to top this all off, a benefit drawing will net lucky supporters a vacation for four in Florida's Disney World plus many other prizes. For more information and reservations, call the Oakland Zoo at 632-9525.

#####



AAZPA
Accredited
Institution

June

1998

Sun	Mon	Tue	Wed	Thu	Fri	Sat
	1	2	3	4	5	6
7	8	9	10	11	12	13
14 Flag Day	15	16	17	18	19	20
21 Father's Day; First Day of Summer	22	23	24	25	26	27
28	29	30				

July

1998

Sun	Mon	Tue	Wed	Thu	Fri	Sat
			1 Canada Day (Canada)	2	3	4 Independence Day
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

August

1998

Sun	Mon	Tue	Wed	Thu	Fri	Sat
						1
2 Friendship Day	3	4	5	6	7	8
9	10	11	12	13	14	15 Assumption
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31					

September

1998

Sun	Mon	Tue	Wed	Thu	Fri	Sat
		1	2	3	4	5
6	7 Labor Day	8	9	10	11	12
13 Grandparent's Day	14	15	16	17 Citizenship Day	18	19
20	21 Rosh Hashanah	22 First Day of Autumn	23	24	25	26
27	28	29	30 Yom Kippur			

October

1998

Sun	Mon	Tue	Wed	Thu	Fri	Sat
				1	2	3
4	5 Sukkot	6	7	8	9	10
11 National Children's Day	12 Columbus Day; Columbus Day (Observed); Thanksgiving (Canada)	13	14	15	16 National Boss Day	17 Sweetest Day
18	19	20	21	22	23	24 United Nations Day
25 Daylight Savings Time Ends	26	27	28	29	30	31 Halloween

November

1998

Sun	Mon	Tue	Wed	Thu	Fri	Sat
1 All Saints' Day	2	3 Election Day	4	5	6	7
8	9	10	11 Veterans Day; Remembrance Day (Canada); Veterans Day	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26 Thanksgiving	27	28
29 First Day of Advent	30					

December

1998

Sun	Mon	Tue	Wed	Thu	Fri	Sat
		1	2	3	4	5
6	7	8 Immaculate Conception	9	10	11	12
13	14 First Day of Hanukkah	15	16	17	18	19
20	21 First Day of Winter	22	23	24	25 Christmas Day	26 First Day of Kwanzaa; Boxing Day (Canada)
27	28	29	30	31		

January

1999

Sun	Mon	Tue	Wed	Thu	Fri	Sat
					1 New Year's Day	2
3	4	5	6 Epiphany	7	8	9
10	11	12	13	14	15	16
17	18 Martin Luther King, Jr.'s Birthday (Observed)	19	20	21	22	23
24	25	26	27	28	29	30
31						

February

1999

Sun	Mon	Tue	Wed	Thu	Fri	Sat
	1	2 Groundhog Day	3	4	5	6
7	8	9	10	11	12 Abraham Lincoln's Birthday	13
14 St. Valentine's Day	15 President's Day	16 Chinese New Year	17 Ash Wednesday	18	19	20
21	22 George Washington's Birthday	23	24	25	26	27
28						

March

1999

Sun	Mon	Tue	Wed	Thu	Fri	Sat
	1	2 Purim	3	4	5	6
7	8	9	10	11	12	13
14 Mothering Sunday (Canada)	15	16	17 St. Patrick's Day	18	19	20 First Day of Spring
21	22	23	24	25	26	27
28 Palm Sunday	29	30	31			

April

1999

Sun	Mon	Tue	Wed	Thu	Fri	Sat
				1 April Fool's Day; Passover	2 Good Friday	3
4 Easter Sunday; Daylight Savings Time Begins	5	6	7	8	9 Orthodox Holy Friday	10
11 Orthodox Easter	12	13	14	15	16	17
18	19	20	21 Secretaries Day	22 Earth Day (Canada)	23	24
25	26	27	28	29	30	

May

1999

Sun	Mon	Tue	Wed	Thu	Fri	Sat
						1
2	3	4	5 Cinco de Mayo	6 Nurse's Day; National Day of Prayer	7	8
9 Mother's Day	10	11	12	13 Ascension	14	15 Armed Forces Day
16	17 Victoria Day (Canada)	18	19	20	21 Shavuot	22
23	24	25	26	27	28	29
30 Memorial Day	31 Memorial Day (Observed)					

VILLA & MONTALVO

CALIFORNIA'S HISTORIC ESTATE FOR THE ARTS

FOR IMMEDIATE RELEASE

September 21, 1995

Contact: Toni Stone

408/741-3421

THEATRE OF YUGEN TO PERFORM AT VILLA MONTALVO

Villa Montalvo Estate for the Arts is proud to present Theatre of Yugen in two very special performances at Villa Montalvo's Carriage House Theatre on Saturday, October 28 at 11:00 a.m. and 2:00 p.m.

Theatre of Yugen is the only theatre company in the United States today working with the 600 year-old Japanese forms of theatre: Noh (tragedy) and Kyogen (comedy). Since its inception in 1978, Theatre of Yugen and founder Yuriko Doi have delighted audiences across the United States, Canada and Japan with exquisitely staged and costumed plays performed in both English and Japanese. Noh plays, originally performed by the legendary Samurai, are concerned with issues of importance to the warrior: loyalty, spiritual strength and bravery. The current practitioners are actually descendants of this noble tradition. Kyogen plays, first performed to provide light entertainment between Noh productions, tell comic stories about ordinary people who find themselves in ridiculous situations and are filled with enough pranks, tricks and foolishness to delight both adults and children, aged ten and over. This is a rare opportunity to witness one of the world's most captivating art forms.

Villa Montalvo is nestled in the beautiful Saratoga Foothills. Montalvo is now offering discounted student tickets for its 1995 Performing Arts Season. Half-priced tickets will be available on the day of the performance on a cash-only basis. Students with a photo student ID card should call the Montalvo Box Office for availability and information on the day of the performance. For general, group and student ticket information, call the Villa Montalvo Box Office at 408/741-3428.

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RAICES DE MEXICO

1998 PLANNING CALENDAR - TO BE COMPLETED!

	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC
PROGRAMS:												
COMMUNITY SHOW - MCKINNLEY THEATER					6-May							
ARTISTIC SHOW - MOUNTAIN VIEW T.F.P.A.										3-Oct		
CLASSES: SESSION 2	BEGINS	—————▶			ENDS							
CLASSES: SESSION 3 (SUMMER WORKSHOP)						BEGINS	—————▶		ENDS			
CLASSES: SESSION 1									BEGINS	—————▶		ENDS
FUNDRAISING ACTIVITIES:												
TAMALES SALE			DATE									
BENEFIT DINNER				DATE								
CINCO DE MAYO PRESENTATIONS					DATE							
SOLICITATION LETTER						DATE						
4TH OF JULY FLOAT							DATE					
SNO-CONE BOOTH (2 DAYS)							DATES					
SNO-CONE BOOTH (2 DAYS)								DATES				
SOLICITATION LETTER									DATE			
TAMALES SALE											DATE	
GRANT DEADLINES:												
SANTA CLARA ARTS COUNCIL												
PHILANTHROPIC VENTURES												
REDWOOD CITY CULTURAL COMMISSION												
CALIFORNIA ARTS COUNCIL (CAC)												
SAN FRANCISCO FOUNDATION												
PENINSULA COMMUNITY FOUNDATION												
FLEISHACKER												
PAGE FOUNDATION												
BAY MEADOWS												
BOARD MEETINGS	DATE	DATE	DATE	DATE	DATE	DATE	DATE	DATE	DATE	DATE	DATE	DATE
PLANNING DEADLINES:												
1999 GOALS												
1999 FUNDRAISING PLAN												
1999 PROGRAM PLAN												
1999 MARKETING PLAN												
1999 OVERALL BUDGET												