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EASTER SEALS

Moderator: Lisa Tucker
October 16, 2013
2:00 p.m. ET

Operator: Good afternoon and welcome to the webinar one of National Center on Senior Transportation Mini Course, Don't Gamble on the Senior Transportation Funding, Winning Local Match for Federal Grants.

All participants will be on a listen-only mode. There will be an opportunity to ask question at the end of today's presentation. At that time, the operator will give instructions on how to ask your question. If you should need assistance during the conference, please (inaudible) the operator by pressing the star, then zero on your Touch-Tone phone.

The conference is being recorded. I would now like to turn the conference over to Lisa Tucker.

Lisa Tucker: Thanks so much (Stephanie).

Hi everyone and welcome to our first of our webinars that are part of the NCST Mini Course on Local Match.

Before we begin, I'd like to let you know that the PowerPoint and audio for today's session will be posted at the online community associated with the course and will also be posted on the NCST Web site, seniortransportation.net.

For those of you who are registered for the mini course, your first homework assignment is already posted on the online community.

With that, I'd like to introduce our speakers for today's session. Carol Wright. We chose Carol to kickoff the NCST Mini Course on Local Match because of her more than 12 years of experience as executive director at James River Transit and James River Senior Centers in Central North Dakota.

After spending 3.5 years there, Carol moved on to do other things but she was called back several years later by her former board of directors to help them after the agency was left over \$150,000 in debt. She has a great deal with experience in the financial management and in particular coming out with Local Match with federal funding.

Carol currently serves as Co-Director of National Center on Senior Transportation and as Director of Easter Seals Project Action.

We would like to follow the presentation today with questions from the audience. So after Carol's presentation, we'll receive instructions from (Stephanie) on how you can ask a question.

It gives me great pleasure to turn the session over to Carol.

Carol Wright: Hi everyone. I am excited. I got attempts to look at the list of those of you who would sign up for the course and I see many names on the list that are familiar to me. So, hi to all of those of you that I know and to those of you who haven't had a chance to stay in any of the National Center on Senior Transportation courses or Easter Seals Project Action event, welcome and we are delighted to have you.

We have set up a mini course that we are ready to launch with today's events and are excited to walk you through the process of coming up with ideas for how to find Local Match and one of the things that over the years has become an issue, not only that we've heard about it in NCST but that has been an issue across the board with transportation providers, is trying to find more ways to fund the services that they provide and we're hoping that this course will help do that.

We wanted to make it available to as many people as possible though. So each of the four webinars that we're going to be doing are available

individually as well and will be recorded separately so that any of you or any of the people that you might want to refer to our Web site can go and have access to these materials. So given that we're going to get started today, this is called "Show Me the Money" and we're going to be talking about fund raising in Local Match.

OK, so the first for the overview, we're going to do a little bit of talking about financial planning and its importance, the fact that it is also important that you do something for your long-term financial stability within your organization. We'll discuss what possible revenue sources are out there for you to use.

We'll spend most of our time talking about how you're applying Local Match and then we will talk about in-kind match just briefly at the end.

During those financial planning, you all know that as an applicant for federal funds, whether you're getting them under the Older Americans Act or through Federal Transit Administration. It's your responsibility to demonstrate that this is non-federal funds to meet the statutory matching requirement. That's whether or not you're getting operating funds or capital fund that you requested under your grant application.

We also know that we have to document all those parts of the local revenue and demonstrate that those revenue sources are stable in the long-term and that's part of the contract. It talks about that you are capable of sustaining the program over the span of the contract and of course, we want to look towards being able to sustain it much further than that.

In addition to the preparation of a yearly budget, translations do need to prepare financial plans that cover a three to five-year plan. And while that would be a whole other course, we're not going to go in to that today, it just gives you opportunity to give this some thought as reviewing with our finances to think that we shouldn't be just looking at our finances, our Local Match or a grant issues one year at a time but really planning for the long (term).

This longer planning process needs to be done with management but it also has to be done under the guidance of the management team. So, all the people

who were involved in those decision-making items, and your governing body. So that everybody is on board for how to proceed.

Most importantly, when you're doing your financial planning, you need to think like a business. I've been involved in nonprofit most of my career but I did spend some time in the for-profit world. And one of the things I learned is, that for-profit businesses look at things a little differently than that process. And I think there are some things that we can learn from them.

And while again, that could be a whole another course. The idea here is for you to start thinking like a bottom line number business and how you want to proceed. And remembering that some of the ways that we're going to try to raise money is by getting other businesses involved and they're going to expect that we think like a business.

We all know also that we have to gather statistics and put together materials for all kinds of reports that we're required to do, but we also have other reasons to do this and one of them is so that we can use that information by collecting our data, issuing reports, measuring our performance and advertising our successes to actually help us in our financial planning process.

So rather than just taking those data items that we have to do for other people, now we can take them and actually turn that information around and use it to help us in our financial planning so that we can present the financial picture of ourselves to others and get them to support our efforts as well.

We also need to plan for financial growth. Now, that's different than just planning your finances. We actually want to know what we want to do to be able to grow our system not only on the service arena but in our finances. And to do that, we want to investigate all of our options so that we can look at what other kinds of things are available to us not just the traditional sources that we've used up to this time.

You'll notice that the next bullet says originally take time for financial planning and I don't know how your (names) go but I assume that they go a lot similar to mine and that is that taking time is one thing but making time is another.

Financial planning is really important and if we're going to give it the importance it deserves then we have to actually set it kind of aside, and to do that, that means that we're making time.

Briefly, we're going to go through some of the revenue sources. Now, this isn't anything that's new to you. You know it's your revenue stream (car) and you have numerous sources of revenue.

Most of you out there are giving several grants of one kind or another. Many of you are getting state grants and fortunately, more people are getting to state grants now than ever before. More states are coming forward to give money to (trans) organizations whether they'd be organizations that are under AAA or they are organizations who are part of State Department of Transportation but they are making state grants available that can be used with local match.

One way or the other, all of you have some type of fare system that you are using, OK, and we're not going to get into this – to the ins and outs of all of those fares and why you choose one or the other but obviously, it's a source of revenue for you.

We're going to talk a little bit about contract revenues and how those can be used. And then spend most of our time again on the local funding sources.

Obviously, the bulk of the money that you get comes in from your federal and state grants. These grants are generally, really important to us and for the most part are fairly consistent. Now, obvious with different kinds of funding streams, those grants go up and down in terms of the money that we have but they still, hence, it comprise the biggest share, the money that comes in to us for us to be able to operate.

Federal grants do tend to have more restrictions on how they can be used. And most of the time, grants awarded from the state or local sources, they have fewer limitations and that's what we want to concentrate on because that gives us the most flexibility in how we use those funds.

When we talk about fares, most public transit agencies charges that fare provided. There are some that provide like free of charge and we're not going to deal with those about today. And we know that those who were funded under the Older Americans Act have to ask for a suggested donation and how they come up with that suggested donation is based on their cost for the ride.

We also know that fare can include a number of different ways in which they can come to your agency. It can be in the form of cash, token, tickets, smart cards, passes, punch cards, permits, charges and contract billing, and this time track billing that we're going to concentrate on today.

Again, you can have a whole training session that's done nothing but on other kinds of revenue. The contract billing, well, it can be considered a source of being the fare income, we're going to talk about why you might want to look at contract billing as the source of Local Match (debit counting) had over there.

Before we get started on those particulars, let's talk just a little bit about five steps to successful funding. Obviously, we want to maximize your existing funding. So, anything that you notice are already getting, we want to make sure that we're putting it to the best use. So all the sources that you're getting, we want to make sure that you're able to continue to get and the money that's coming in, we want to be able spread out as far as we possibly can.

Another option that you may or may not have considered at this point is that you could have established an endowment for foundation. That's really only available for those of you who are 501p3 nonprofit organizations if you're part of a city or county government that isn't an option for you at this time. But for those of you who where it is an option that's something that we'll be discussing as a possible way of coming up with some additional local money.

What I really want you to do is to look beyond the obvious for your funding opportunity. Sometimes, we say, "Well, how can I do the things that I've been doing now, how am I to do them better?" And well, I think that's really important and that goes back to point number one.

But what we really also want to be doing is looking beyond what we are doing now for other funding opportunities that we haven't maybe part of before and that's what this series of four webinars would hopefully going to give you.

Number four is to create successful special events and you can't live off of just special events, OK? If you're going from one special event to the other, you're going to emboss yourself, you staff and your community in terms of trying to support you in that way. But then it doesn't mean that you can't find one or two successful special events that you want to concentrate your efforts on and make as a staple of your long term successful funding.

And number five, we want to evaluate opportunities for in-kind match. Now, in-kind match is not available in all states. And so we aren't going to spend a lot of that time and effort on that particular one but I do want to make it available to those of you who do have it as an option.

Finding Local Match, this is one of my favorite pictures that were shared with me with – by (Tom Malnar) who was with the Colorado (DOT). This is an actual picture. I'm glad that's not any house that I'm planning to live in. I always think it should be part of a (jeep) commercial.

Now, the (extreme) climbing rocks, here they can show them doing a C driveway. But really, most of the time, we consider finding Local Match to be an uphill client. And what I'm going to try to convince you is yes, it might be an uphill client but it's really doable as long as we take time and do our planning.

So what are some of those sources for our local funding? We're going to spend our time talking about contracting some, subsidy, contribution, fund raising and advertising. We're also going to talk about the opportunity to take advantage of United Way. How we can form business sponsorship that can support our campus operation, endowments, in the foundation and things like establishing a for-profit business that can support our non profit organization.

So to get started, we're going to start – we're going to begin with our contract revenue. Most of you already know that transit systems often provide

transportation to agencies and organizations on a contract basis. The contract revenues can be used as a Local Match.

Many times, we find transit agencies using those contract revenues as their income. So, you are allowed to use them either way. You can make them fare or you can turn them into Local Match. My argument to you is use them as Local Match, take them obviously your fare revenue stream because it gives you more flexibility that sustain a lot of money coming in to your agency. But now, it can be used to match your federal dollars.

So, we'll be looking at your contract revenues as a local match, opportunity. So the first question you have to ask yourself is, are the rights currently providing that to be turned into contract instead of their income. Examples of these might be that you are providing rise for your local shelter workshop. You might be providing rise for a human service organization.

And right now, you are charging them for the individual rise and you are putting all of that in to your fare in constraint. Instead, you can meet with them, you need to know exactly what those rise are costing you. You have to come up with a contract that you can use for providing those ride. But one should becomes a contract, you get the same fair income coming in, but now, it turned into a contract and it matches your federal dollars and that's just one way of looking at the money that you already have working for you but making it work better.

The second thing that we're going to talk about is subsidy. What is a subsidy? What it usually is funding from the cities or counties and we usually get it through tax levies that are specified for public transportation. And many people say well my city or county would absolutely never support us and give us any additional money.

We've gone to the county commissioners or we've gone to the city commission and we talked to them and they're never eager to help us or they tell us that they have their own problems, they don't have money to support us.

However, 2012 proves differently. When we look at what has been happening across the country, 2012 was a great year for public transportation. In 2012,

49 out of 62 public transit ballot initiatives were passed and that was nearly at 80 percent passage rate.

In the history of public transit, we haven't had that much success for a long, long time since public transit was first getting established. OK. So, I'm willing to bet that in these 62 places, this wasn't their first initiative, that wasn't the first time we've tried to get funding that most of them said this will never work. So, why did it work this time?

Well, because they got people out to vote. They made their (case). It didn't rely on just going to city commission or their county commissioners. Instead, what they did is they went to their communities or they went to their region that they provide the service (service) and they made a case for why it was important for them to subsidize public transit.

You know, when we talk about subsidizing, they already feel like public transit is subsidized and most people, if you ask the public, they think that rise is already paid for. Well, you get federal money. We don't have to help you with any other money.

So, the first thing that has to happen is you have to go out and educate people. This (Third Day) American support for public transportation was conducted by the Mineta Transportation Institute and it shows that the nearly 74 percent of all the people who respond in the said survey agreed to the use of their tax dollars to create, expand, and improve public transportation in their community.

Why? Because for the first time, they understood the importance of what that money was going to go for and I think that's really important that we do our education efforts. We think that by going to just the political powers and asking the (center to go with them). And these kinds of things show that we have to go beyond that and take our case to the people.

So, what about contribution? Contributions are money given not as a contract or a fare but it's a gift for donation, OK? We think of it sometimes with memorial to people give that to the transit system when a loved one has passed away.

OK, but it can go well beyond that. It can include funding from local organization. You can go to outside foundations and get their support. There are a number of communities where the public utility has the fund that you can apply for that will give money and especially they officially like to support other public organization. It is seeking out contribution.

Just going and asking often isn't enough. Again, we have to go through that, education process. And we think people know that we're out there and we're available for people to donate and the truth is that many people never think about giving us money and they don't think about giving us money until we tell them that we need it, we tell them what we do and we tell them how to donate.

OK, we think people understand why just – you just right to chat and – but educate people and make them aware of how to do the donation.

OK, what happens is we just don't take it far enough. Fundraising, kind of an evil word in lots of people's vocabulary because they think, you know, I already do all of the things that just keep our organization going, I don't have time to fundraise on top of it.

And by fundraising here, we're talking about separate events designed to bring additional funds into your agency to support your transportation services. It can range from a giant (pig sale), in my part of the country, those are called rummage sales. OK, it can be a fund raising luncheon or dinner that is held on an annual basis. You'll see these ones advertising an (ace) annual, OK? Or it can be a whole campaign as the one in the middle, show your spot, let's raise that and it's a campaign.

Here it shows that from the very smallest donation to the largest, everyone makes a difference and it was a whole campaign based on this particular campaign theme.

So, it goes the whole range of all different kinds of ways that you can raise those funds.

You need to understand that fund raising, it's both an art and a science. OK, it isn't just a thing that you do but you have to put a lot of thought into it. A part of fundraising is how you go about developing and nurturing relationship with people and organization.

That means that relationships develop overtime. Relationships aren't your first time contact with people. They aren't you're crush with others but it's relationship that you form over the long call with individuals in the community with organizations in the community and forming partnerships and it doesn't just happen automatically, it takes a concerted effort.

How many of you have actually sat down and done planning process with people who are part of your management team, part of your stacks and says, who is that that we come in to contact with the most. Who is that that we make the most difference for? We give a lot of rise for instance to senior adults. How about the adult children of those seniors?

Who should we be trying to make connections with? Who will make a difference? So, we try to work at developing and nurturing relationships with people who will make a difference in the short run but more importantly over the (long call).

I said it's art and a science, there is some real science to that. I told you earlier in this webinar about collecting your data and it's not just for (joint) report. It's using your data, your research and passage fundraising models to achieve your organizations' revenue goal.

So, first of all, that means you have to have revenue goal. So, that's the number one step you want to take. You have to figure out how much are we going to count on in terms of raising money through our fundraising efforts. What do we have as our goal?

Many times, people say, well, as much as we can weigh. It's been proven overtime that if you have an actual goal, you are much more likely to come up with that amount of money than if you just leave us the chance and see how much each particular event for (inaudible).

So, decide, when you're doing that (free aside) to your plan or when you're doing that to your budget, what you intend to bring in and what you need to bring in and then do a stretch. In other words, by what you've done every single year, let's click that goal out there so you have to do a little bit of a stretch to get to it.

Look at fundraising models, OK. Look to other types of organization. What have they shown to be really good models as we said. You know, is it the mailing campaign, OK? That used to be top way of raising money. Now, it might be on online campaign.

OK, you have to look or see what works for you. And again, it goes back to looking at your information and being able to use that information to trust the right people. We're going to spend just a little bit of time talking about some special event. One is a direct mail campaign. I had friends who were managing (clarification) organizations and every year, they did a direct mail campaign. Every year, they would have an appeal at the same kind of year and everyone knew that it was going to be coming and they asked for direct contribution and they told people what those contributions were going to go for.

It's really important if you're going to do this that you include the human element. So, come up with some story. What is it that your transit system does that's different or that makes the difference for other people? It might be something a story of an elderly person that was able to get to their cancer treatments or dialysis or whatever it happens to be. It might be that preschool child who – mother doesn't have to worry about because you're making sure that the child gets to their daycare and some daycare to their preschool and back. And the mom who is working and maybe not even in the same community, know that their child and someone who's responsible for their child is taking care or making sure that happens, OK?

It might be an after school program. It might be a program for troubled kids. It really doesn't really matter what it is but in your direct mail campaign, you can't just be writing the same generic letter that you're getting from everyone

else out there, you have to tell your story and what is compelling about your story that makes you different from anyone else.

Sometimes, we compare each other, ourselves to each other and we say, well we all do the same thing but we all do it in the same place. So, just because your story is the same as some other transit provider doesn't mean that each of you don't – doesn't have a compelling story to your community – excuse me.

One of the things that we did when I went back to the James River, we were in desperate, straight. And we had to come up with a \$150,000. We have to come up with it right now.

And so, I became the fundraising queen and we did survive especially that, which I don't recommend but it did give me an opportunity to try out a lot of different kinds of things and see what works.

We convinced our local access channel, in this, you can't do in every community. But in our community we just – we convinced our local access channel to let us do a (telefund) and we got all the local celebrities, which I use that word kind of loosely to be able to help us. And what we did is we got a lot of youth groups. And the reason we did that is because who fund youth activities better than grandmas and grandpas?

OK, so we knew that when they were on, they're asking for money for us that, you know, things that we could ask for, no one makes fund. But as the grandchild, grandma could you please donate or our group has been in the line of girl scouts and we want to make sure that we raise more money that this group of boys scouts is coming on later, grandmas and grandpas will make sure that their child or grandchild is successful. And it was huge.

It raised us tens of thousands of dollars in one day. And so, that's something that you can do, you can't do it all the time but your local access channel might be willing to help and be a partner and we did – we had three counties and this was just for a one county area.

So for our other two counties, they didn't have a local access channel but they had a local radio station that serves those two counties.

So, it had been so successful for us on the television channel and the one county that the next year, we ask to be able to do our radios on in the other two counties and it was equally as successful because we've showcased all the local talent. We got different groups to compete against one another and then I have to tell you that we knew ahead of time, we've seeded the pot, we went to a number of different organizations and knew ahead of time that they were going to come on and give (checks) and ask them to challenge other local organizations to match that money.

And where did we learn how to do that? Have you ever watch (PBS)? Have you ever been to (Jerry Louis telefund) any of those kinds of things, we used a lot of the same techniques that they use and did it for our organization.

You might have a yearly festival. We did a festival of trees that was real successful for us that was done at Christmas time. We had different organizations decorate trees. The trees were auctioned off, that was successful for us. Not one that we repeated year after year but it was one that we did the first year. Find a yearly festival that works for you.

An annual event, the first year we needed to come up with – again, something else and we did a golf tournament. I've never done a golf tournament in my life but we found someone who has and they helped us sponsor it. That golf tournament is now I think in its 16th year and it brings in over \$20,000, one day event.

Now, the first couple of years, it was a lot of work. It's really not a lot of work anymore because we've done it long enough. What we did for the golf tournament that was really kind of neat. And some car dealership, have the ability to take out its Lloyd's of London policy and what it is is they can get a car through their main – like a Ford dealership or their Cadillac dealership or whoever they are.

Whoever they get their vehicles from, they can get like a Lloyd's of London-type policy and they don't pay very much for it and they can give a brand new car if someone gets a hole in one on a particular hole and you pick the worst hole on the course, you know, that no one has probably ever got in the hole in

one on, OK? And you make that the hole. But your entire advertising campaign for that particular event stems on you could win this car.

When people are looking at what golf tournament they want to enter. That at least catches their attention, OK? And so, it was a big deal. We also got a lot of, you know, and we we're asking (inaudible) center as well as our transit organizations, so we went to our food vendors and we would say, OK, the longest drive on this particular hole for a man and the longest drive for a woman wins the case of steak and our food brokers would give us a case of steaks.

OK, well people love the idea that they had a chance of winning a case of steaks even though they might not be a particularly great golfer. We also did a putting contest and we charged for it and we had all kinds of special fun things for it.

We sold mulligans for \$25 and that's allowed someone do not have to count one of their shot. We went all kinds of tricks. We had a raffle drawing that same day and people – you didn't have to play the golf tournament to participating – excuse me – in that raffle but we raffled that day. And we'd always have the item there and we usually try to go get a gas grill or a beautiful patio of set, something that we could develop of course and everyone could see. People brought tickets that day that wouldn't normally buy tickets.

So, those are called piggybacking events. So you not only have your tournament for the day but you try to have a lot of piggybacking events that can go with it. And then you've go over in that capital year after year.

So, you get the same teams. They now have to cut off registration for this permit whereas you scramble to get enough people to do it.

So, that's the idea of building special events that you can hold every year and build upon. And then, keep working on all of those little extra things that you can build in and do differently year after year to keep people interested in that event.

Many of you probably heard of operation round up for keep the change. What you do is you work with some of your local stores and you ask for a certain period of time whether it's a week or month, whatever your particular community will be able to support.

And out of that story, you have containers that people when they go through the line and they get changed back, they take all of their change and put into your container and it goes, please provide rights for those who can't provide for themselves, whatever it happens to be or please help us give rights and you always have pictures that are part of it.

And then the operation roundup or keep the change is the rounding up your bill to the next dollar. Sometimes grocery stores will do that for you and then keep track of it. Same with drug stores, others make you have the actual container there for people to drop the money in, depending on how long and how many stores you have, this can be really a crude or lucrative effort that you can do. And it's very easy to organize with the (live) extra staff come.

And sometimes, with those of you who are smaller organization, those kinds of things are really important because you don't have a staff to devote full-time fundraising.

The last special event I'm going to talk to you about and there are a million of these. I used to think I should write a book on different fund raising events and then that would be our fundraiser because the proceeds from the book can support us.

The last one is a charity events. And what that is, is you go out and you go to all kinds of rummage sales, you advertise in the paper for people to donate different kinds of chairs to you. And you do that over a period of a certain amount of time, then you give those chairs to different organizations and you ask them to decorate that chair.

So, you have wooden chairs, you have metal chairs, you have high chairs, you have upholstered chairs. Every kind of chair that you can think of and you have different groups decorate them for you. Then you have a fundraiser dinner with an auction and you've auction of those chairs.

Now, what you want to do again is have as many school children involved as possible in helping this grade school classes to challenge each other schools to challenge each other art classes, whatever it happens to be because grandmas and grandpas, if you have a class of 25 kids who all contributed to decorating three chairs, you also have them have to get 25 kids, you have several sets of grandparents for each one of those kids. You have a lot of people competing to get the chair that they're grandchild worked on. And it's amazing how many will pay over \$150 for a chair that cause you nothing that isn't even really attractive but it was their grandchild's chair.

So, you can also have a theme choose. It doesn't have to be a chair. It can be bench. You can make it look like (bus stops), whatever it happens to be. But it's best if you do this for a designated purpose. So, maybe you were are going to get a new bus that year, OK?

And so, all of the money that's raised for that is going toward the local match for your new bus. People will also gives more if they think it's for a particular cause. And then, you can also have a thermometer that you set up that does, look, this is how close we are and people love when they know that you're getting close to the top to feel like they were the one that supported you.

OK. So, that's just some special events ideas that you might want to follow up on.

Advertising, you can sell, advertising placed on the inside and outside of your vehicles, on your bus schedules, in bus shelters, in bus stop benches, and newsletters, whatever it happens to be.

I know these are a little bit hard to see. But on the bus bench to the left says why ride the bus? And I said, you know, why ride the bus if you can do this instead, OK?

This is to show you that you want to take control of your advertising, OK? You don't want to sell advertising just for the sake of selling the advertising. This was for a carpool effort. OK. And the car pool effort wasn't part of the

bus program. So, make sure that you also have in there that you get to control what that advertising goes for it.

United Way, some communities have very active United Way programs, which support non-profit organizations including yours. When I first came to James River, we got \$2,500 that your fund United Way. It worked very hard and made the case. I also worked very hard with United Way. I did a lot of speaking in their behalf. I went to all kinds of organizations in the community and told their story. When I left, we were getting \$25,000 a year from United Way.

Business sponsorship – this is where you fund local business and so organization that might sponsor one or more of your vehicles for a specified period of time and during that time, they can have exclusive of use of the vehicles exterior for advertising if desired.

We worked with Wal-Mart. Wal-Mart has a program nationally where it needs to give away a certain of its money every quarter. We got on the list and from Wal-Mart, we were able to get \$1,000 of quarter – every quarter, OK? That's \$4,000 a year for doing nothing but getting on their list.

For that we designed a logo and we put it on one bus. One the back of one bus, it's just that Wal-Mart Supports Public Transit. That logo piece cause me about \$150. For the \$150, I got \$4,000 a year. They're still getting that money. I think, we're on like year 15, 16 something like that. You add up and tell me if that wasn't worth the effort.

Find out who those businesses are in your community. When I went to Wal-Mart and said is they knew my bus pulled up there. They have no idea how many times that they. They have no idea how many people wait up there, OK?

Again, that's keeping track of your numbers. And down in some foundation, if your 501c3 nonprofit, you can look at establishing a local endowment or foundations to support your non-profit agency. People should also know how to start an endowment. What do you do if you have a foundation?

Well, to begin with, all you have to do is start a separate savings account called your long-term financial stability fund. Now, you can give it a much, much clever name than that but the idea is it doesn't have to be any more than in your savings account for any of you and it can turn to an endowment or a foundation.

What you want to do if you're going to go this route is you need to be able to create a case for a cause so that people know why they should give to you. Basically, what it is, people are willing be selling profit and they're willing to support you organization but they have to have a justification of why you.

There are all kinds of wonderful efforts out there. Why should they pick you instead of the Red Cross? Why should they pick you instead of the local hospital? Why should they pick you instead of an organization that saves animals, OK? It's because you have to create your own case of cause because every one of those efforts is a good effort.

You also -- again, if you're going to establish an endowment, your foundation needs to establish financial goal. Because what gets measured gets done. A friend of mine, they got the donation from someone went to pass away and that \$10,000 and that's what got them started.

They established a goal of \$100,000, OK? They made that goal in the less than two years, never even having had an endowment or foundation. Why? Because, all of a sudden it became important to them.

Again, relationship building is the key. You need to elevate the need for public support for transiting your service area by telling your story and your story isn't about numbers, it's about people and it's about service.

And the purpose of your endowment has to be clearly identified and conveyed (henge) of donors. If you don't know about endowment from foundations, educate yourself. I went to Google it and this was the first book that came up, OK. Do the same things yourself. Examine your option, decide if you're interested in doing a special appeal, interested in participating and plan giving that's generally where people donate to you in their will, OK?

If you want to do a capital campaign for a building project or a bus project but don't forget to get accounting and legal device and doing on the upfront side, not one to your – too far into the project.

You're going to identify key supporters, recruit volunteers and influential, recognize and honor the people who donate to you and this isn't just about the endowment from foundation but this is really good advice all the way it through. Looking for matching fund opportunity and never apologize for asking for support.

I think sometimes, we're so used to as nonprofit saying, "I'm sorry to have to do this," but, OK, don't apologize, make the case for why you're just as important as everyone else.

Lastly, establishing a for-profit business. Every business that's listed here, I'm aware of a transit organization that had this business or has it now to support their nonprofit. That means they've establish a separate for-profit business and those precedes from that business benefit their nonprofit organization.

My agency established a catering business. That catering business is still going today and it brings in more money than the financial support from our (FTA) and Older Americans Act together. Now, and it was started just to bring in our Local Match.

An agency that's being aware of also was in a building that shares space with what has been a movie theater and they turned the safe into a dinner theater opportunity. They were a senior center, a transit operation and they were in this building with an empty space.

And so, they made a deal with a local theater troop and they did dinner theater. Another one, they did a maintenance and repair shop. It has to be separate from you (STA) funded space and there's a lot of things that you have to do because of it but they were located in a very remote rural area and there wasn't a maintenance or repair shop anywhere close and they did not only the maintenance stand on their vehicles but on lots of other vehicles decide.

One organization was in a community that didn't have car wash and they got tired trying to figure out how to wash their buses. So, they came up with their own money to build kind of sheltered car wash. They came up with their own money for the sprayer system. And now, they washed everyone's car in town, they've hired stuff and they solve their problems for keeping their bus clean and it's a profitable business that makes everyone in town happy, not only to have that they clean buses.

My organization in my two smaller counties started gaming. Gaming used to bring in a few thousand dollars for them because they have a bingo efforts, then it become legal to household hub and blackjack and it's now bringing in \$40,000 to \$50,000 a year for them.

Another organization was the senior center also and they operated a for-profit coffee shop. It became and most popular coffee shop destination in town. They had a great grandma who was a baker and everyone wanted to come to Grandma's Coffee Shop. These are all existing businesses that I know that were established just for-profit businesses, separate for-profit businesses with a 100 percent of the profit going to the nonprofit.

Very briefly, in kind match. Not every state allows in kind match. You have to find out first if you are allowed to do it but it refers to any service, asset or products that's provided free of charge. Non-cash contributions are eligible to the accounted for the Local Match only if the value of each is formally documented and supported and represent the cause that was otherwise be eligible under grants.

So you can't have a position, for instance, that someone's willing to donate their time to you but you wouldn't hire it if you have to pay for it. It's most often used for specific capital expenses such as facility construction. We used it at my agency when we went to build a bus barn. We got the land donated. And so, that was able to be used as our match. We didn't have to come up with any local match.

Some people own the land but someone is willing to donate a building to them. Or sometimes, someone is willing to donate building and land. That's

including the emptiest property in a community that's now owned by the city and they're willing to donate it to a non-profit organization if they'll take on the reconstruction effort and that can be your just in kind match.

Just be aware the many states don't allow in kind match and you have to check that out ahead of time.

All right. I went five minutes over my allotted time, but I'm available to answer any questions that you might have. And hopefully we provided you with some ideas that you can be thinking about and pursue on areas that you might not have done up to this point.

Lisa Tucker: Great. Thank you so much Carol. And as you said, we are available to take a few questions. We have about 10 minutes.

So, (Stephanie), could you please provide the instructions on how participants can ask a question using their phone?

Operator: At this time, if you would like to ask a question, please press star then the number one on your telephone keypad. Then let a star then a number one on your telephone keypad to ask a question.

Our first question comes from the line of Steve in New Jersey.

Steve Fatanti: Yes, Carol, regarding on vehicle advertising. I was wondering how you felt about the use of brokers to assist in terms of sales, development, production of media, and placement of media.

Carol Wright: Great question, Steve, thanks. You can go either two ways. Number one, there's no problem using a broker. They're going to take most of your profit. You end up getting 10 – I don't know what's the going rate is now but it used to be 10 to 15 percent was your cut in the money. If you didn't have to do anything, OK? And they did all the hard work of finding advertisers, working with people who were going to keep the decals or whatever form of bus wrap you are going to use and getting it ready for you.

So, it was 10 or 15 percent of money that you didn't have prior to that. And so, people saw that as an advantage. I don't see any problem with using a broker. I would check around with other past agencies and see who they've had really good experience with this and who they may not have had such good experiences with. Some are easier to work with than others. I would have – make sure that you have contract with that organization and I went to have it via a short-term contract for instance. For a year, I would have – and then, you can always have an extended contract after that time. I would also retain control that you can refuse some of the advertising for instance that bus stop with a good example.

We also had problems on the warehouse with one agency who – a strip club wanted to advertise and it was viewed very negatively by the community because it was quite a salacious and that have been placed on the bus and the bus company that list it up to the broker to, you know, broker any kind of ads they wanted to have.

And so, you want to make sure that you have in your contract also that you get to approve any ad content and you can, you know, that you can reject any and all ads. You also have to be very careful about political advertising. So, you want to watch for that. But it's really up to you. If you have staff that has the time to be able to sell ads, that's one thing. If you don't, then I think it's perfectly OK to use a broker.

Are other questions?

Operator: Again, if you would like to ask a question, please press star then the number one on your telephone keypad.

Again, star then the number one to ask a question. Again, if you would like to ask a question, please press star then the number one.

Carol Wright: I couldn't possibly have answered everyone question today.

Operator: Please, press star then the number one.

Lisa Tucker: OK, great. Thank you so much Carol. Do you have any final thoughts that you wanted to share with everyone before we sign off?

Carol Wright: Just to let you know again that that – we put a lot of time into writing our grants, OK that we get through our federal funding sources. We put a lot of time into writing our grants that we get through our state and obviously, that's important because that's about 80 percent of the money that we're going to bring in most of the time, OK?

However, you should be putting in the same type of attitude and concentration to a local match requirement. If there's anything that you got from there is that planning is really key. There are lots of different ideas that were offered here but it really isn't a shot and approach. It is for you to take a concerted look at all the different options and see what really works the best for you, for the kinds of staffing you have, for the environment that you operating, for the kind of organization that you are.

Some of these work better than others in your particular circumstance. But it should be something that's well thought out and planned and you should have some solid goals in mind. You should not be just fine by the seat of your pants and hoping that you have some good results.

So, if anything comes from this, I would have it good part of a real serious planning efforts. I hope that many of you are part of the course and we'll look – we're making the homework assignment easy for you. It is not time consuming but hopefully, it's something that can benefit you and your agency in the long run so that you can – a year from now, see some really mark differences in the results that you get in coming up with your local funding.

Thanks everyone. It was great having you on board today. And please make sure that you join us for other webinars. Thank you.

Operator: We did have a last minute question from Chad in New York.

Carol Wright: OK.

Chad Washington:Hi, Carol. I just wanted to say that you are very thorough. I had had questions before but I assumed you answered them all. And I'm just wondering if there's a way to contact you for anything more specific.

Carol Wright: On the slide that's up right now, it has my e-mail address and that would probably be the best way to get hold of me if you have something specific.

Chad Washington:OK, great. Thank you.

Carol Wright: Thanks a lot, Chad.

Lisa Tucker: Thanks everyone for joining us today to Carol for our presentation. And thank you to our operator, (Stephanie).

Of course, your feedback is important to us and we like to know what you thought so we'll be sending you a link to a brief evaluation about today's session and we just ask if you take a few moments and give us your feedback about the effectiveness and complete that evaluation. It will just take about two minutes.

And keep an eye on our Web site, seniortransportation.net and your e-mail about future NCST event. And of course, this is the first and of series of four webinars. And so, we invite you to come back and join us for the next three.

The calendar is on the Web site and also on the online community. If you are registered participant for the Local Match Mini Course, as Carol, said, your homework assignment is already posted in that online community and we can continue our discussions from today that community.

Most important to your commitment to increasing and improving senior transportation in your community and have a great day everyone.

Carol Wright: Thanks guys.

Operator: Thank you, this concludes today's conference call, you may disconnect.

Presenters, please hold the line.

END