

FIRST STEPS

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Intro to the First Steps

Hey you,

Congrats! You've already been hard at work, laying the foundation for organizing a successful Walk for Clean Water. By already rallying your team, creating communication platforms, and formulating a clear vision for your Walk, you're ready for what's next.

We call the next steps the "First Steps" because they're essential building blocks that solidify your strategy, allowing you to pursue other areas in-depth. Here's an overview of the First Steps explained throughout this guide:

- **Building Your Team**
- **Establishing a Budget and Bank Account**
- **Fundraising Online**
- **Obtain Approvals/Permits**
- **Planning a Launch Event**
- **Getting Thirst Project Involved**
- **Planning Like a Pro**

As a general matter, we definitely encourage you to be jotting down notes and ideas that come to mind when going through each of these Guides. Remember, these packets are just that — guides that should spark ideas within you and your team, helping clarify your vision for your Walk.

Be sure to read through the entire Guide 2 first before completing steps, as many steps affect and incorporate one another. In addition, several upcoming steps will require you to email employees at Thirst Project. Just be sure to CC us (walk@thirstproject.org) on all emails to keep us in the loop!

Toolbox Overview

Available at walk4cleanwater.org/toolbox (must be accessed via this link)

Through planning the past two Walks, we've found what works and what's not as effective. As you begin planning your Walk for Clean Water, we want to share with you all the strategies, tips, and tools you'll need to launch a successful Walk. We've broken down the many complex pieces of organizing a Walk through the following structure, which we'll refer to as your "toolbox":

Comprehensive Guides

These 6 guides will cover the full range of aspects you'll need to plan your Walk. They are yours — feel free to print them out, mess them up, write notes, scribble ideas on them, or just keep them on your computer.

1 | Preliminary Planning

This first guide will go over everything you need to get started. From what we're all about to assembling a team of your own, it's in here.

2 | First Steps

What now? This guide will be all about the first big steps and actions your team can take towards making your Walk a reality.

3 | Marketing

How you frame and get the word out about your Walk is essential to its success. We'll share all the tips and strategies to take yours to the next level.

4 | Finance/Sponsorships

Raising thousands of dollars in a short amount of time can be a daunting task. This guide will show how to tap into your community to make it happen.

5 | Logistics

The nitty-gritty details for anything are often overlooked, but they're critical for any successful large event. We'll break down what to cover and how.

6 | Post-Walk

Although the majority of the work might be done, it's not over yet. It's important to tie up all the loose ends to ensure success for the future.

Supplemental Resources

In addition to these guides, we have plenty of other resources that will be helpful along the way. From templates of posters and flyers to sample budgets, these will all be available online in the coming weeks.

One-on-One Consulting

We want to ensure you have everything you need to be successful. While our resources will be rather comprehensive, we know you'll have questions. Whether you want to Skype, email, or request a specific resource, we'll be beside you every step of the way.

Building Your Team

As discussed in Guide 1, assembling a reliable and hardworking team is an essential first step in planning any event. But, this is especially important for a student-run event like your Walk for Clean Water. So, now that you have a group of passionate people together, exactly who does what? What is the best way to tackle the challenges using the talents and time of your team?

Key Concept: Designate roles within your team

Regardless of who is on your team, everyone has something they bring to the table. Talents, time, and areas of interest may differ between your team members. This is not a weakness — in fact, it's your biggest strength. But, it's important to establish a clear structure of what tasks and areas each person will focus on. Most likely, each team member will end up doing multiple different things, so overlap may occur. But, there's several areas of focus we suggest certain people take charge of:

- **Walk Director(s)** - This role is the overall leader or leaders of the Walk. We recommend having between 1-3 people that take charge as the overall leaders of the Walk. Dependable and dedicated, they are ultimately responsible for all functions of the Walk and oversee other teams working on specific functions.
- **Marketing and Publicity** - Innovative and savvy with social media, your marketing/publicity team is focused on getting the word out effectively and creatively. From leveraging social media to putting up posters, the team will focus on ways to promote and engage numerous groups from around your community and region. Team is led by the Director of Marketing and Publicity.
- **Finance** - The key to raising crazy amounts of money to fight the water crisis? Persevering when told “no.” Strategic yet personable, members of your finance team are tasked with developing a strategy to contact local businesses, delivering pitches that convey your vision, and maintaining proper oversight of all income and expenses. Team is led by the Director of Finance.
- **Operations** - While other teams work to establish funding and community presence, your operations team will be hard at work planning every detail of the Walk itself. Detail-oriented and collaborative, members oversee all the moving parts from obtaining tables and chairs to ensuring the Walk course is prepared for all walkers.

This structure is meant to be flexible depending on your individual Walk, size of your team, and preferences. Maybe your Finance Team will end up just being comprised of two very dedicated Directors of Finance. Perhaps you have tons of passionate team members, giving you the ability to create branches within your Marketing and Publicity Team that focus on different aspects. You know your team best, and it should function how you need it to. Don't let the “official” titles scare you...all of your team members are equally important and each play a crucial role in ensuring your Walk's success.

Establishing a Bank Account & Budget

Making a Budget

Although we will explore budgeting strategies and other financial aspects later on in detail, a vital first step is creating a budget. Understanding how much money you have at your disposal will allow you to better develop strategies for fundraising and covering costs.

Available Resource: Budget Template

To help save you time, we've uploaded a budget template to the Toolbox page of our website. Through Google Drive, you can make a copy of this spreadsheet and edit it to be your own. Follow the instructions on the Toolbox page for accessing this template.

Note: The template document contains 2 sheets: the first includes samples and instructions for using and maintaining the template; the second, a blank template that can become your budget.

Any basic budget will have two main sections: income and expenses. As a general matter, it's important to be specific when logging transactions. In addition, be sure to keep receipts and emails that reference transactions for reference later on in case of a discrepancy or error.

Income: This is where to log all donations and registrations to your Walk — both online and physical transactions. Income will include online registrations and donations for your Walk, business sponsorships, personal donations, and any contributions to your fundraising total.

Expenses: This is where to record all expenses and the funds used to cover those expenses. Because we commit 100% of all donations (Income) to funding clean water project, your Expenses Budget must be funded separately. Refer to the following Key Concept and Budget Template for more clarification.

Key Concept: 100% of donations go directly to funding clean water projects

An integral principle of Walk for Clean Water, 100% of all public donations and registrations for your Walk will go directly to Thirst Project. As a part of that, we recommend having all of your sponsorships from businesses go directly to Thirst Project. (Businesses are more willing to donate knowing that all of their money will help fund clean water projects rather than expenses). However, you might be wondering, "how will we pay for expenses?" To cover expenses, you will need to find other sources of funding (we recommend *private* sources). Examples of this include:

- Money from your club's budget that can be allocated specifically for your Walk
- Funding from your school, student council, or other available community/event related funds
- Money raised from independent fundraisers leading up to your Walk (think Chipotle or local restaurant nights, bake sales, etc.)
- Grants and other funding programs
- Generous donors or individuals
- Your parents who are willing to have their donation cover necessary expenses

As you can see, obtaining money for both fundraising and expense purposes requires some digging, hard work, and trial and error. However, as we'll cover more in the "Finance/Sponsorships" guide, the best way to cover expenses is creating as few as possible in the first place.

Establishing a Bank Account

Throughout the process of organizing and planning your Walk, you'll need an account to store received funds and to pay expenses. The best way to do this is use an already existing bank account associated with the organization through which you're organizing your Walk. Most high school clubs and organizations will have special accounts they can use for exactly this purpose, whether they utilize them or not.

Check with your organization's advisers if you already have an account to use. If you do, be sure them to ask to review past records to find the account balance, in addition to any policies that govern how funds are received and can be utilized. After that, devise a strategy for how any existing funds in that account will be allocated for Walk expenses and create a shared plan for keeping track of all funds in your budget.

If you don't have a school account... Ask for one! The best person to ask is usually a school secretary, who can point you in the direction of who can help. Keep your adult advisers involved in this process, as they'll probably need to fill out some paperwork. If you're having difficulty, explain your situation and ask your school administration how to best treat the issue. Usually, they'll be more than willing to help.

If you're still unable to get a school account... If you still can't establish a school-affiliated bank account, it's not the end of the world. However, be sure to get in contact with us as soon as you realized you can't obtain one. We can give you further guidance if that situation arises.

An important piece of information is to whom outside donors should make checks payable. Ask whoever administers your bank account (e.g. club advisers, school secretary) to find this out. This is an important piece of information to remember...once you have it, you can use it to start raising money!

Fundraising Online

There are two components to fundraising for your Walk: online and physical. Online fundraising consists of walker registrations and donations. Physical fundraising is broader, encompassing sponsorships from businesses, physical donations, and door-to-door contributions.

This step will only focus on online fundraising. To fundraise online, there's an easy-to-use service through Thirst Project called "Classy." Classy is a platform that allows you to create an event, collect donations, manage registrations, measure total amounts raised, and track the progress of your Walk from start to finish.

Setting Up Your Classy Page

We will set up your Classy page for you, but you will be an administrator, giving you access to customize your event and track metrics on Walk registrants and total money raised. To create your page, **you must have the Walk Information Survey completed.** (See the Toolbox webpage to complete).

Using Your Classy Page

We will contact you once your page is created, giving you guidance on how to best operate and manage the page. Once it's all set up and customized to your needs, it will be linked to your Walk page on our website, allowing you to start collecting donations!

Obtaining Necessary Approvals/Permits

Ambitious ideas are what drive change. But, change can't take place unless you follow (some of) the basic rules. Wherever you're holding your event, there will be several stakeholders that will be involved. If you're in school, you will need to communicate your plan to hold a Walk for Clean Water with several parties to ensure you have both permission and support.

Your Advisers

First, the adult advisers for your club or organization must be looped into everything you're up to. Using all the aspects of the vision for your Walk you planned out from Guide 1, communicate with your advisers to get their thoughts and insights on your plan. They don't have to be doing the work to organize the Walk, but they should definitely be in the loop as you're taking big steps and making progress. Decide amongst your team and advisers clear expectations for how involved they will be. Be sure everyone agrees from the beginning how much you want them involved, how much they want to be involved, and how you will keep them in the loop throughout the process.

Don't have adult advisers? Look for and ask trusted teachers and adults who have the necessary positions to oversee or become involved in helping organize the Walk. For example, you don't want to ask one of your parents to serve as your adult adviser when they don't have access to school administrators, programs, or a school-affiliated bank account.

Your School Administration

Once your team and advisers are all on the same page, you'll need to seek approval from your school and/or your community. Ask your advisers for insight on what permissions you'll need and how to go about obtaining them. At any school, we've found it's best to talk directly with your administration. Set up a meeting with your principal, or one of your assistant principals, by communicating with school secretaries to arrange this. (Hint: Make friends with your school secretaries...you will need their help a lot!) Be sure you understand the "Speaking and Meeting with Others" steps below before meeting with your administration. When you meet, clearly convey what school facilities or property you would like to use (if any), address any potential questions or concerns (if you can't answer a question when you meet, ask to get back to him or her), and make it crystal clear how your Walk will positively benefit your school community. Before leaving, establish the best line of communication with your administrators to ensure you can update them as necessary.

Your Community

In our experience, we've found it's best to keep your Walk course contained in one physical location if possible. The more streets, sidewalks, parks, or other locations that become involved, the more permissions and work is created for you. If you're holding your Walk in an area not affiliated with your school district, reach out to your township or city to find out what necessary permits, fees, or permissions are required to utilize the property. If it seems costly, untimely, or unrealistic, consider switching locations to a place that's easier to use.

Speaking and Meeting with Others

- **Be Professional** - Always present yourself with respect when meeting with anyone else — not because you need something from them, but because it's the right thing to do.
- **Be Prepared** - Always plan ahead before meeting with any school official or third party. It's always best to create an organized agenda with all important points of discussion, facts, the date + time of the meeting, and who is attending the meeting. Be thorough in what you need to discuss, but organize your agenda as an outline from which you'll expound upon. Print copies for everyone attending the meeting and a few extras in case additional people attend. This not only makes for a smooth meeting, but will certainly impress your administration right off the bat.
- **Be Passionate** - Details and logistics are important. However, your passion is the key ingredient to winning the support of whoever you're meeting with. This is where your vision comes in. When someone sees that your team is not only professional, prepared, but extremely passionate about solving the water crisis in your own community — that is what will ensure those around you aren't just supportive, but excited to help make it a reality.

Thinking Ahead

Depending on your Walk's individual plans, additional parties you may need to speak with later on for approvals or to cement logistics may include:

- Your school board
- Athletic director
- Printing services
- District communications director
- School nurse and medical staff
- Custodial staff
- Buildings and grounds staff
- School/school district's financial manager

Be sure to talk with your adult advisers so you fully understand what departments and parties will most likely be involved. Having your advisers reach out to these people in advance will give you easier access and greater understanding for what you may need later on.

In addition, the more you can have other parties communicate things for you, the easier your job becomes. For example, instead of reaching out to local police so they know your event is taking place, see if your administration is able to do that for you. Work smarter, not harder.

Planning a Launch Event

So...how are people going to even know your Walk is taking place? Well, thanks to the tools of social media and present-day communication, there's endless strategies to get the word out to your community. We'll cover those in the "Marketing and Publicity" guide later on.

But, one of the most valuable groups you have access to is the students at your school. Youth, especially our generation, are powerful assets for change. But, they don't just need to know the details of how to get involved. They need to be inspired and empowered so they know why they should. We've found the best way to do just that is by "launching" your Walk on a day leading up to the big day. We recommend this taking place about a month out from your Walk, or even further out.

Your Launch Day should be all about getting people's attention, spreading your message, and ultimately, making a statement. What that looks like for you and your school is completely up to you. Be creative! Convey the important information of what, where, when, why, and how on your terms. Here's a few ideas of things you could incorporate:

- **An all-school assembly** - Pump up your school, educating them about the global water crisis and inspiring them to take action. You can even invite Thirst Project to come speak at your school (see the next step, "Getting Thirst Project Involved")
- **An optional assembly** - Perhaps you can't arrange an all-school assembly, but you could have a smaller, more intimate event. Students could be invited to hear Thirst Project speak (if available) or learn more about the water crisis.
- **A creative school announcement** - Most schools allow students or clubs to speak on the morning announcements or other school news. This would be a perfect place to get the word out. Ask if you'd be able to get creative to catch students' attention. This will also be a good method to use leading up to your Walk, but we'll cover that more in the "Marketing and Publicity" guide.
- **Posters around your school** - Utilize the printing services offered to clubs and teachers to get your message plastered all over the school walls. Be sure you know any restrictions for what can and can't be put up. However, be flashy, creative, and get those posters up everywhere! (We'll be uploading poster templates to help out).

Remember, these are just ideas, and you know your school best! Feel free to use any combination of the ideas above or none. Be creative, convey the message and why it matters clearly, and don't be afraid to think way outside the box.

Getting Thirst Project Involved

Speaking About The Water Crisis

As the world's largest youth water organization, Thirst Project spreads its message to youth by speaking to them directly. They do this by sending out teams of "Road Warriors" that teach students about the crisis and empower schools and communities to raise money toward funding clean water wells. Through their school tour, Thirst Project stops at schools all across the country in both the fall and spring.

Road Warriors or a Thirst Project representative might be able to come speak at either a launch event for your Walk, or at your Walk itself. To find out more, you'll need to get in touch with Thirst Project.

Email Tracie Umali at traciemae@thirstproject.org

- Subject: "*Walk Name* Road Warrior Visit"
- Include your Walk name (e.g. Walk for Clean Water: Atlanta)
- Give details about location, expected dates and times
- Time and setting for Thirst Project to speak
- Send information as soon as possible

Other Thirst Project Involvement

Although we're here to give you guidance and other support, Thirst Project itself might be able to provide some goodies. Looking for any buttons, pins, or other Thirst Project trinkets? Thirst Project sometimes has limited quantities of bracelets, pins, and other items that can help you display your dedication.

Email Kellen Brewer at kellen@thirstproject.org

- Subject: "*Walk Name* Item Request"
- Include your Walk name (e.g. Walk for Clean Water: Atlanta)
- Request items
- Include estimated quantity

Planning Like a Pro

Phew...take a deep breath. Seems like a lot of stuff to keep track of huh? Well, there's certainly a lot of different aspects to think about for your Walk. However, you can save yourself a lot of trouble by staying organized and laying out all your plans coherently and logically.

We found the best way to do this is in a shared folder. Platforms like Google Docs make it easy to keep organized plans that everyone can see and update as you go. We recommend several strategies:

Master Plan

Your master plan is exactly what it sounds like. Having a thorough document that takes your vision and organizes it into practical components and elements is essential. Sections and an outline format are helpful, but you should choose a format that works best for you and your team.

This will be a living document. As your Walk advances in complexity and planning, things will need to be added, changed, and analyzed. This is where online services like Google Docs excel. Don't be afraid to start with a messy hodgepodge of ideas and bullet points. That will lead to more thoughts, allowing you to refine and add detail to what you already have.

Here's a sample of how you can organize your master plan:

Before the Walk

- Vision basics
- Marketing and Publicity
- Event Details
- Sponsorships/Partnerships

Day of Walk

- Schedule
- Set-up
- Areas
- Food
- Structures
- Entertainment/fun activities
- Logistics
- Volunteers

We'll explain in detail how you can best attack each of these sections in the following guides. Until then, give it your best go for what you're already thinking!

Timeline

Once you have lots of aspects and elements of your Walk down, it's important to have a timeline for getting them done. We found it's most effective to organize tasks and Walk elements from big to small. For example, write down "March" for all things you want to accomplish for the month, further breaking it down into weeks. Then, add days when specific tasks are to be completed. Assign specific tasks to people and hold them accountable.

As time goes on, stay organized. Highlight or bold more important tasks. Cross out completed items using the strikethrough function. For each week, consider assigning an aspect to focus on. When months end, move them to the bottom of the timeline. Examine what was effective, what took longer than expected, and if you're being too vague or including too many tasks.

Mapping out tasks that need to be completed before and at your Walk will allow you to better understand the holistic process of what goes into the planning process. Feel free to create these documents and run with them. Customize them so they can meet the needs of your team.

Just to Review...

Once you've completed the following, you're ready to move on:

- Designate roles within your team
- Make a budget
- Establish a bank account
- Set up your Classy page (complete Walk Information Survey)
- Brainstorm and communicate plans with your adult advisers
- Reach out to school and local authorities for permissions/permits
- Plan a launch event for your Walk
- Invite Thirst Project to come speak (recommended)
- Create a master plan
- Create a timeline

Next Steps

Once you're ready to move on, here's some important follow-up steps:

- **Become comfortable with your platforms** - Be sure you know how to use your Classy page. This is where you can check all the information about who's signing up and how much you've raised. Also, be familiar with your site page to see if you'd like any changes made.
- **Explore supplemental resources** - We create all of these resources for you! Definitely utilize them if you think they'll be helpful. Feel free to request specific resources that you'd like to use.

Coming Soon:

- More guides (yay!)
- More supplemental resources
- Individualized consulting and feedback