

Greetings,

We are excited to reach out to your organization for funding about a project we at Open Bookkeeping, AORTA, ABC, and TESA have been working on for the past year: a free, digitally downloadable multimedia Cooperative Financial Education Kit that will be in both Spanish and English. We hope this kit will be a real asset to your organization, and the people and organizations you work with. This education kit will strengthen our economic justice and cooperative movements by supporting co-ops, collectives, developers, and other justice oriented groups to develop financial skills and financial systems steeped in anti-oppression and collective ideology. **In order to bring this project to life, we are looking to you to help us raise a minimum \$65,000 needed to move the project from its research phase into production phase.**

We are reaching out to your organization because we think that you will be able to utilize this kit to help your efforts in creating a more democratic economy, and because we think that your organization has the ability to help fund this effort. This kit will be free, digital, and bi-lingual, making it a tool that will be immediately accessible to you and your constituents. As you will see in the attached sponsorship levels, supporting this kit will also enable you to increase your visibility, receive in person trainings, and embed the kit on your website. Most importantly though, in the words of Dorian Gregory from the Cooperative Fund of New England from their letter of support, “An accessible and engaging training platform that teaches financial literacy would significantly increase the viability of the worker co-op sector.”

Why the Cooperative Financial Education Kit

The Cooperative Financial Education Kit addresses two major issues facing our movements on the organizational level:

- 1) the lack of an anti-oppression and collective mindset in organizations' financial systems and
- 2) the need for an increase in skills around financial literacy, systems and decision-making. All members of a our organizations must meaningfully participate in conversations and decisions around financial matters to truly be considered democratically-run. The kit addresses this by using a three pronged approach: using education to distribute knowledge and increase skills, creating democratic financial structures and systems to hold groups accountable, and facilitating whole-group conversations around power dynamics to address power imbalances.

The kit will include the below four sections. Each section will be comprised of (a) a self guided workshop, (b) financial templates, (c) additional resource materials and (d) video conversations

& interviews with groups and organizations that have worked through these issues. The four sections include:

- Collectively Creating a Budget
- Financial Literacy and Basic Report Reading
- How Power & Privilege Show Up Within Finance Roles
- Creating Collectively Oriented Financial Systems

The kit will be free for download and created in both English and Spanish. For this kit to be accessible we believe it is imperative that it is free and produced in both English and Spanish.

Who is creating the Kit

For the production phase, our core team of project developers include:

- ABC: A Bookkeeping Cooperative
- AORTA: Anti-Oppression Resource Training Alliance
- Open Bookkeeping
- TESA: Toolbox for Education and Social Action

Over the past year, during our research phase, TESA and Open Bookkeeping have been working closely with eleven partner organizations to better understand what organizations need, how to best meet those needs and what materials already exist. Our partner organizations include:

- CFL: Center for Family Life
- CDI : Cooperative Development Institute
- CFNE : Cooperative Fund of New England
- DAWI: Democracy at Work Institute
- Deep Roots Market
- ICA Group
- Southern Reparations Loan Fund
- Manos Unidas
- NASCO
- New Economy Coalition
- New Frameworks Natural Building
- NOBWC : Network of Bay Area Worker Coops
- Pioneer Valley Workers Center

We worked with these partner organizations in a series of focus group conversations that helped us to identify content goals, pedagogical methods, and kit structure. We will continue to work with these organizations in 2017 to help test the kit and review the content.

Kit Timeline:

Market Research & Feasibility: Fall 2015

Partner Organization Outreach & Research: Winter 2016

Funding for Toolkit: Winter 2017

Production: Spring 2017

Testing and Review: Fall 2017

Project Completion: Fall 2017/Winter 2018

Budget for Cooperative Financial Education Toolkit

Below you will find our general budget for the development and creation of the kit. There is no doubt that it is expensive to create a bilingual, multi-media education kit that is digital and free to download, and as the research phase of the project made clear, these elements will be essential to the kit's accessibility, longevity and overall success.

Project Developers

| | |
|------------|----------|
| ABC Time | \$15,000 |
| AORTA time | \$15,000 |
| OBK Time | \$15,000 |
| TESA Time | \$15,000 |

| | |
|-----------------------------|-----------|
| Graphic Design | \$5,000 |
| Animation | \$5,000 |
| Translation/Spanish Edition | \$10,000 |
| Marketing | \$1,000 |
| Video | \$7,500 |
| Project Management | \$7,500 |
| Miscellaneous | \$4,000 |
| Total Expenses: | \$100,000 |

Thank you for taking the time to look over this proposal. Please feel free to reach out to us directly with any questions or follow up:

Alex Fischer: alex@openbookkeeping.com

Andrew Stachiw: andrew@toolboxfored.org

Cheers,

Alex & Andrew

Sponsorship Levels

\$1000 Sponsorship Level

Your Organization's Name included in Thank you on our website
Your Organization's Name included in Thank you in the kit
One vote on final name of the kit

\$3000 Sponsorship Level

Your Organization's Logo (thumbnail-sized) included in Thank you on our website
Your Organization's Logo (thumbnail-sized) included in Thank you in the kit
Your Organization's Logo (thumbnail-sized) included in Newsletters Regarding the kit
Your Website Can Offer the Kit for Download
One vote on final name of the kit

\$5000 Sponsorship Level

Your Organization's Logo (banner-sized) included in Thank you on our website
Your Organization's Logo (banner-sized) included in Thank you in the kit
Your Organization's Logo (banner-sized) included in Newsletters Regarding the kit
Your Website Can Offer the Kit for Download
Your Choice of:
1 Segment of the kit facilitated with your co-op (3-5 hours) or
Donate 3 hours of consulting to an org of your choosing
One vote on final name of the kit
Your Choice of \$250 of materials/games produced by TESA
Co-opoly the Game of Cooperatives
Loud and Proud
Rise Up!
Posters
And More!

\$10,000 Sponsorship Level

Your Organization's Logo (banner-sized) included in Thank you on our website
Your Organization's Logo (banner-sized) included in Thank you in the kit
Your Organization's Logo (banner-sized) at the Beginning of each Video segment in the Kit
Your Organization's Logo (banner-sized) included in Newsletters Regarding the kit
Your Website Can Offer the Kit for Download
1 Segment of the kit facilitated with your co-op (3-5 hours)
We Will Donate 3 hours of consulting to an org of your choosing
One vote on final name of the kit
Your Choice of \$500 of materials/games produced by TESA
Co-opoly the Game of Cooperatives
Loud and Proud
Rise Up!
Posters
And More!