

# 6

## Project Leader **Orientation and Cheque Issue**

Coordinating NSG Toolkit  
**Module 6 out of 9**

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INTRODUCTION TO MODULE 6: PROJECT LEADER ORIENTATION AND CHEQUE ISSUE

## Introduction to Module 6: Project Leader Orientation and Cheque Issue

Once granting decisions are made, each Neighbourhood Small Grants (NSG) area hosts an event in order to orient Project Leaders to and connect them with other people involved in the program. This event is often also used to provide them with information and resources to support their projects and provide them with their cheques. This module includes guides and templates for coordinating this event.

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## Guide to the Project **Leader Orientation Event**



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## Guide to the Project Leader Orientation Event

Once the granting decisions are made, Neighbourhood Small Grants (NSG) areas host an event in order to orient Project Leaders to the program, connect them with others involved in the program and provide information and resources to support their projects. This is usually also where the distributing of the grant cheques happens. Below are some of the different components you may want to include in your event and some ideas to get you started.

### Scheduling, Format, and Registration

- **Availability:** Do your best to hold the event based on Project Leaders' and Neighbourhood Grants Committee (NGC) members' availability. This often means evenings or weekends. Some communities organize two Orientation events at different times so people can attend the one that is convenient for them.
- **Save the date:** It is useful to add "save the dates" to materials sent to Project Leaders as soon as possible, as well as to provide them to the NGC and Partner Organization staff. These can just include the date and time, with announcement of the details of the celebrations being sent out at a later time. This will allow adequate time for people to make arrangements to come and increase attendance.
- **Format:** If needed, the event can be held online through video conferencing (for example, [Zoom](#)), or one in person and one through video, although in the case of video you will need to find an alternative way for people to receive their cheques. If it is only offered on video, this may prove to be a barrier to those with limited or no access to technology, so it is usually best to have at least one event in person.
- **Length:** This event should be between 1.5-2 hours in length.
- **Online scheduling platforms:** If you like, you can send out a poll with several dates to find out when the best date and time is for the largest number of Project Leaders and NGC members. The following online scheduling platforms are free and easy to use: [LettuceMeet](#) [When2meet](#) [Doodle](#)

Zoom Video Conference →

[zoom.us](https://zoom.us)

Online polls for setting dates and times for meetings →

[lettucemeet.com](https://lettucemeet.com)

[when2meet.com](https://when2meet.com)

[doodle.com](https://doodle.com)

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Eventbrite →

[eventbrite.ca](https://eventbrite.ca)

- **Registration:** Many communities use [Eventbrite](https://eventbrite.ca) to send out free tickets so they have a sense of how many people are coming to the event, or otherwise have people RSVP by email.
- **Frame as a community building event:** Project Leaders who know they will receive their cheque at the event may want to drop in to pick it up and then leave. For this reason, some NSG areas do not let Project Leaders know that they will receive their cheques at the event, and stress instead that it is a mandatory orientation and chance to connect with others involved in the program. Others require that people stay through the event in order to receive their cheque at the end.

## Set Up and Roles:

- **Food:** Consider offering food as an incentive for coming and to help warm the space. Make sure to have a range of food available, including those with dietary needs and preferences. Coffee, tea, juice and easy finger food can be provided, or even a sit down meal depending on the type of event you are planning.
- **Accessibility:** Always include accessibility information in your invitations to the event. For example, try to hold the event in an accessible space that is friendly for wheelchairs, other mobility devices and strollers and encourage people not to wear scents as many people are sensitive to them.
- **Schedule of activities:** It can be helpful to have a written schedule to provide invitees in advance and to have posted in the room during the event. This way, people have a sense of the flow of the event and will be less likely to miss something important.
- **Room setup:** Give some thought as to the best room set up to facilitate the activities in your event, including tables and chairs. You may want to consider your audio/visual needs including a microphone and places to plug in laptops for project displays. Give yourself ample time to prepare the room(s) before people arrive.

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- **Staffing:** Ask NGC members and partner organization staff to play different roles at the event, including set up and take down, staffing a welcome table and the cheque distribution tables, and facilitating an icebreaker or other activities. Assigning these roles in advance during the event planning can be helpful, although of course some changes may be necessary on the day of the event.
- **MCs:** It can be helpful to have an MC or two that can lead the event. Invite NGC members or Project Leaders to MC, offering them guidance and support as necessary.

## Welcome:

- **Door greeters:** Consider having someone at the door to greet people, provide nametags and answer questions as people arrive.
- **Acknowledgement of territory:** Begin the event with an acknowledgement of the First Nation(s) on whose territory the event is held or invite someone from a local Nation to do a welcome/opening to the event. Remember to look into local protocol around acknowledgements and honoraria for someone doing a welcome/opening. If you are a non-Indigenous person, you may also want to use this as an opportunity to reflect on the relationships between the local NSG program/Partner Organizations and Indigenous communities in your area, and name some of the history, connections and work being done towards reconciliation. You can learn whose territory your NSG program takes place on here: [Interactive Map | British Columbia Assembly of First Nations](#) or [First Peoples' Map of B.C.](#)
- **Welcome talks:** The MC, Coordinator and/or Partner Organization staff can welcome people and speak a bit about the event and the NSG program in general.
- **Housekeeping:** Let people know about food, bathrooms, name tags, the kids area etc. The MC can also point out the program staff and NGC members so Project Leaders know where to find them if they have questions or want to connect, and housekeeping matters such as food, bathrooms, and name tags.

Online polls for setting dates and times for meetings →



[bcafn.ca/first-nations-bc/interactive-map](https://bcafn.ca/first-nations-bc/interactive-map)

[maps.fpcc.ca/](https://maps.fpcc.ca/)

## Project Leader Orientation and Resources

- **Principles of Grassroots Grantmaking and Granting Guidelines:** Some NSG Coordinators do a more formal orientation as part of their event, where they go over the guidelines for NSG projects as well as the principles of the program. This could include a PowerPoint presentation if you choose. Try to make this as interactive as possible in order to engage the participants.
- **Tips and best practices:** The event can also include the presentation and sharing of best practices and tips for things like eco-friendly events, promotion and doing outreach to neighbours, deepening impact and connecting neighbours beyond one-off events, bylaws and permits, accessibility and inclusivity, budgeting and seeking support from local businesses and organizations, finding venues and so on.
- **Mentorship:** The Orientation event can be a good time to inquire about what projects might be needing more guidance and support and which more experienced Project Leaders or NGC members might be willing to provide this. This could happen, for example, by having sign up sheets for groups wanting mentorship and individuals willing to provide mentorship. Or, mentorship relationships can be set up ahead of time and the event can be a time for people who have been paired together to meet one another.
- **Written resources:** Even if you don't print handouts for all participants, consider having paper copies of any resources (including those already sent out by email) available for Project Leaders who may need this, for example because they don't have regular computer access or access to a printer. This will also encourage people who have not read them yet to do so.

## Waiver Signing and Cheque Distribution

- **Cheque pick-up station:** Set up a station to distribute cheques. It can be helpful to have the cheques alphabetized according to the last name of the main applicants. If they are organized by project names, this can cause issues if people forget what they called their project on their application. However, because co-applicants may also come to pick up cheques, it can also be good to have a list of projects handy (including project names, main and co-applicant names, and the amount approved - a template ([see 6.2.3](#))  is available for this) in case you need to find the cheque another way.
- **Timing of cheque distribution:** As previously mentioned, if people pick up their cheques at the beginning of the event it may make them feel less motivated to stay for the rest of the event. As such, having the cheque distribution at the end of the event can be helpful in having people stay for the orientation and community building aspects of the event. You may also want to spread out cheque distribution in some way or have multiple stations, as otherwise there can be very long lineups.
- **Cheque sign out form/waiver:** Have the person picking up the cheque sign a waiver stating that they have received the cheque and agree to follow the guidelines of the NSG program and local municipal regulations. Many NSG areas also include a liability waiver as part of this process. [Cheque Sign Out Form Template \(see 6.2.4\)](#)  is available for this.
- **Check ID:** Have the person(s) at the cheque station look at the ID of the person picking up the cheque if possible. There is a place on the Cheque Sign Out Form template for the staff or volunteers to indicate that they have checked the person's ID. Not having ID can be a barrier for some however, so it is OK to make exceptions.
- **Other methods of cheque pick up:** If the applicants are not available the day of the Orientation event, you can consider allowing someone to pick up the cheque for them. If so, you may want to send the applicants the text of the waiver from the Cheque Sign Out Form (see 6.2.4) in an email so that they know what has been agreed to when the cheque is signed for by someone else. You can also ask for explicit written permission from the applicants to have someone sign for them. There may also be projects that have no representative available to come to the cheque event. Having a way for them to pick up the cheque and sign the waiver at the Partner Organization at a later date can also be helpful. Staff at the Partner Organization will need to be instructed on the waiver and to check ID. Or you may decide not to distribute the cheques at the event at all, and instead set up another way for Project Leaders to receive their funds.



**Other Potential Activities and Presentations:**

- **Allow for networking:** Celebrations are also about networking and sharing of information and so adequate time needs to be built within the event schedule to allow for this. You can facilitate discussion by providing name tags, doing icebreaker activities, or asking everyone to take a few moments to speak with the two or three people closest to them about their project.
- **Icebreakers:** An icebreaker can be a great way for the Project Leaders to meet one another and make it easier for people to start conversations about their projects. Icebreakers can also include a doorprize (perhaps something made and bought locally) as an incentive. [Icebreaker templates are available for use \(see 6.2.5\) ↓](#).
- **Children's activities:** Consider offering children's activities so the event is family friendly. This could, for example, include an area with toys, games and colouring supplies.
- **Inviting local officials:** Partner Organizations may want to invite elected officials including MLAs, MPs and Mayor and City Council members, to NSG events. This is a great way to introduce government officials to the many NSG projects their constituents are involved in. If there is time, you can consider offering the option to speak briefly at the event. Below are some guidelines on how to formally address, write to or speak with elected officials.

**Provincial Officials - Members of the Legislature**

Address: Ms. Jane Doe, MLA

Salutation: Dear Ms. Doe

Conversation: Ms. Doe

**Municipal Officials -Mayor and Council**Address: His Worship John Doe and Council/  
Mayor Doe and Council

Salutation: Dear Mayor Doe and Council

**Municipal Officials - Mayor**

Address: Their Worship Mx. John Doe

Salutation: Dear Mayor Doe

Conversation: "Mayor Doe" first, then "Mx. Doe"

Note: Mx. is a gender neutral salutation

**Municipal Officials -Councillor**

Address: Councillor Jane Doe

Salutation: Dear Councillor Doe or Dear Mrs. Doe

Conversation: "Councillor" or "Councillor Doe" first, then "Mrs. Doe"

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- **Sharing about projects in writing:** As some people may feel shy and time is limited, having attendees write about their project can also be a great way to share information. You can put big sheets of paper on the wall and provide markers. Label the sheet with instructions such as “Tell us about your project (don’t forget to put your email address in case people want to participate!).”
- **Discussion groups:** If there is time, you could place people in groups according to the type of project they are planning or based on topics they are interested in learning more about. For example, you could group together block parties, food related projects, gardening projects, art projects and so on or form groups on topics like promotion and outreach, accessibility, community building beyond the block party and so on. Invite them each to share a bit about their project and ask each other questions, or have facilitators guide them through a discussion.
- **Neighbourhood maps:** Invite attendees to write the name of their project (and email if they feel comfortable and there is room!) on a sticky note or sticker and place it on a large map so that other Project Leaders can see what events are happening close to where they live.
- **Marketplace of projects:** Some NSG areas also print forms, either prefilled with the project name and description or with places for Project Leaders to fill in this information, and with room for people interested in updates about the project to sign up with their name and email. These can be distributed later to the Project Leaders so that they have the ability to contact the interested parties as their project is implemented. A template for this activity is available [\(see 6.2.6\) ↓](#).
- **Project Presentations:** If there is time, consider inviting 1-2 previous year Project Leaders to do a presentation on their project. Ask them to include a few tips for other people organizing NSG projects and an opportunity for questions and answers.
- **Workshops:** Some NSG areas offer workshops on topics like community building, accessibility or promotion and outreach for interested Project Leaders during or after the main event.
- **Promoting ongoing online connection:** You can use the Orientation event as a place to get permission from Project Leaders to add them

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Google Groups work well for creating and managing email groups →

[groups.google.com](https://groups.google.com)

You can use Facebook Groups as a way to stay connected with each other. Here's how to create one →

[facebook.com/help/167970719931213/](https://facebook.com/help/167970719931213/)

to an email group ([Google Groups](#) works well for this), a [Facebook Group](#), or another way of staying connected with each other and inviting other Project Leaders and program staff and volunteers to their events. You can also encourage Project Leaders and NGC members to join local or regional NSG social media pages or newsletters at the event, so they know about what's going on in their regions. This could be through putting them up on a wall, speaking about them verbally and/or including them in any written materials that are distributed.

- **NSG Videos:** One of the best ways to see what the grants are all about is through stories. If there is time, one or two of these inspiring videos can be shown during the event. They are available [here](#).



## Project Leader Orientation: Resources & Templates



### 6.2.1 Making an NSG Event Accessible and Inclusive Template

The NSG program is committed to everyone feeling welcome at and supported to participate in our events. This template includes some ideas for how to make an NSG event inclusive and accessible.

### 6.2.2 Inclusive Event Planning for Coordinators

This infographic summarizes a few of the main components of organizing an event, such as a Project Leader Orientation, that is inclusive of a wide range of people.

### 6.2.3 Approved Projects Template for Orientation Event

This template can be used to create a list of approved projects as a reference for distributing cheques. Rather than having to fill this out yourself, you can export the data from the online Grant Management System (GMS).

### 6.2.4 Cheque Sign Out Form Template

This template can be customized as a form for Project Leaders to sign when they receive their cheque. It acts as a way to keep track of what cheques have been picked up, a liability waiver, and a confirmation that the grantees are agreeing to follow the NSG granting guidelines and local municipal bylaws, regulation and permit requirements.

### 6.2.5 Icebreaker Templates for Project Leader Orientation Events

An icebreaker is an activity or game used to warm people up and get them to interact with each other. These icebreaker templates are designed to be used at Project Leader Orientation events.

### 6.2.6 Marketplace of Projects Template

As an optional activity at the event, this template can be filled out ahead of time or given to Project Leaders to fill out while at the event as a tool to gather contact information of those who are interested in attending or volunteering at or can contribute resources towards the project.