

The Learning Exchange



- **What it is, how it works**
- **How you can set up a similar program for your community**

G. Robert Lewis and Diane Reiko Kinishi

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The Learning Exchange

Dear Shel,
Thank you all the
so much for all the
help you've given us as
an Advisory Board member
in informing more Chicagoans
residents of the educational
and recreational opportunities
available to them through
our free service. Your
advice and assistance
have played a major
role in making
the Learning
Exchange what
it is today!
Gratefully,
Bob &
Diane



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Dedicated
to our families
and especially our spouses,
PEGGY and GENE,
for their support,
understanding and assistance

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Bob Lewis
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Evanston, Illinois

INTRODUCTION

HISTORY OF THE LEARNING EXCHANGE

During the winter of 1970-71 Denis Detzel, co-founder of The Learning Exchange (TLE), participated in a series of educational seminars at Ivan Illich's Center for Intercultural Documentation (CIDOC) in Cuernavaca, Mexico. Innovative educators from all over the western hemisphere took part in the sessions. One of the major purposes of the seminars was to brainstorm for creative educational models which were viable, inexpensive, and readily accessible to rich and poor alike. The Learning Exchange model evolved from a discussion group in which Denis Detzel, Edgar Friedenberg, Paul Goodman, Ivan Illich, Everett Reimer, and a few others participated. The task before the seminar participants was to find a way to tap the unused, underutilized educational resources that exist in a community and then find a simple, inexpensive way to make those resources available to members of the community. (For an in-depth presentation on the rationale and philosophical underpinning of TLE model, read Ivan Illich's Deschooling Society and Everett Reimer's School Is Dead.)

Denis brought the idea of an educational/recreational listing and referral service back to Northwestern University and shared it with some students, faculty, and members of the Evanston community. After three preliminary meetings, a group of graduate and undergraduate students, and a faculty member, along with a few community residents, founded The Learning Exchange on May 24, 1971.

Even though TLE was established independently of Northwestern University, seed money for initiating the project was obtained from a university source—Willard Hall, a dormitory, awarded TLE a \$25.00 grant from extra funds that were remaining in the dormitory's social fund at the end of the academic year. With this donation, TLE printed 1,000 leaflets describing the service and purchased a supply of 3x5 index cards to start an information bank. A small office and a telephone were generously contributed by the Evanston Volunteer Bureau four hours per evening. During the first week of operation, all the printed leaflets were distributed throughout Evanston. A total of three people registered. In the next few months posters were displayed, radio stations broadcast public service announcements for TLE, members of the volunteer staff were interviewed on several radio and television shows, and articles about TLE appeared in a variety of daily and weekly newspapers in the metropolitan area. By the end of the first year, approximately 1,000 people were registered.*

* A published research project, The Learning Exchange: An Alternative in Adult Education, by Gregory Squires, describes the results of the first year of operation in much detail—this publication can be obtained from TLE.

Since then TLE has been progressing steadily. The chart below indicates the year-to-year growth of the organization in terms of: 1) number of people registered with TLE; 2) number of topics participants have listed to teach, learn, or discuss; and 3) annual operating budgets.

GROWTH CHART

Year	Participants	Topics	Budget
1	1,000	400	\$250
2	4,000	1,200	17,000
3	10,000	1,800	27,000
4	14,000	2,200	51,000
5	20,000	2,500	62,000
6	30,000	3,100	114,000

More specific details of TLE's historical development are interspersed throughout the text of many chapters that follow.

GOALS OF TLE

TLE was established to accomplish the following five goals.

1. Develop an economical and efficient vehicle to collect, organize, and make accessible information about educational/recreational resources and needs in metropolitan Chicago.
2. Encourage individual citizens to assume the responsibility to teach, learn, or share their interests with others.
3. Assist public and private institutions in the development of their educational/recreational programs.
4. Become a self-supporting organization through client memberships and contributions.
5. Offer to other cities a working example of how the educational/recreational resources of a community can be better utilized.

As you read the following chapters you will be able to determine the extent to which each of these goals has been achieved since the founding of TLE.

DESCRIPTION OF TLE

TLE is an independent, not-for-profit, educational/recreational listing and referral service available to institutions, organizations, and people of all ages, races, socioeconomic levels, and educational backgrounds throughout the metropolitan Chicago area. The listing and referral services of TLE are free to users and the organization is primarily supported by a voluntary membership program which is described in Chapter VI.

Physically, the program consists of an information input, storage and retrieval system housed in two rented offices of St. Luke's Episcopal Church in Evanston, Illinois. At the time of this writing, TLE has 4 full-time and 15 part-time staff members. The telephone listing and referral services of TLE are available 68 hours a week (Monday-Friday 9:00 AM - 9:00 PM, Saturday 9:00 AM - 5:00 PM).

To use the service, Chicago area residents who want to teach, learn, or share their interests simply call TLE and indicate their educational and recreational needs and/or talents. This information is recorded, categorized, and stored in TLE information bank. The telephone resource counselors at TLE then use this information to refer teachers to learners and learners to teachers. People with similar interests are referred to each other. After referral, participants assume the responsibility of creating their own educational and recreational arrangements according to their own needs, abilities, and convenience. They determine when and where to meet, length of meeting, materials to be used, and whether or not there will be a fee.

Since TLE does not provide meeting space for participants, approximately 90% of the tutorial sessions, classes, workshops, and discussion groups are held in the homes and apartments of clients. Libraries, community centers, parks, churches, business offices, and even restaurants have also been used as meeting places for TLE participants.

Presently, more than 3,000 people are listed as teachers through TLE. They come from all walks of life and most of them do not have formal teaching credentials. TLE was established on the assumption that a teaching certificate does not necessarily assure teaching competence (as is fairly obvious to observers of most any school system), nor does the lack of a teaching certificate necessarily have to be equated with teaching incompetence. In Chicago, for example, less than 7% of the adult population are certified teachers, yet the other 93% have the "know-how" that keeps the city functioning—the architects, auto mechanics, secretaries, craftsmen, engineers, plumbers, housewives, administrators, nurses, etc. While most of these people do not have teaching credentials, they still have skills, talents, and knowledge they can share with others if they want to. TLE affords them the opportunity to do so, even if they don't have a college degree or a teaching certificate.

The results, so far, have been quite favorable. More than 7,000 tutorial sessions, classes, discussion groups, and recreational activities have been initiated by TLE participants; and feedback from learners who have

met with TLE teachers indicate that over 90% of them have been satisfied with the quality of instruction they receive. The small amount of dissatisfaction is usually the result of personality differences between teachers and learners, scheduling problems, incompatibility of teaching/learning styles, and fee or travel difficulties.

All TLE teachers are independent agents. They are not paid by TLE for their services. Teachers may charge learners a fee or they may teach free of charge. Approximately 70% of TLE teachers charge for their services, often on a sliding scale based on one's ability to pay. The hourly rate generally ranges from \$.50 to \$10.00 an hour depending on the subject, teachers, and number people in the group. The other 30% either provide their services at no charge or develop some sort of a mutually agreeable exchange arrangement, e.g., "You teach me French and I'll teach you guitar," or "You teach me French and I'll weed your garden."

The listing and referral services of TLE are being used in a variety of ways by Chicago area residents. Below are twelve of the more popular uses:

1. Participants are finding tutors and teachers in more than 50 foreign languages, 100 types of arts and crafts, 50 musical instruments, plus scores of academic subjects, manual repair skills, and other kinds of educational and recreational activities.
2. Individual citizens who have acquired skills, talents, and knowledge are experiencing the satisfaction of sharing their "know-how" with interested learners in and around their neighborhoods.
3. Handicapped people and senior citizens who cannot attend formal classes are finding teachers willing to visit their homes.
4. Persons who are preparing for GED and CLEP examinations are finding tutors to assist them.
5. Parents are finding tutors for their children who might be having difficulty with a particular subject or who want to learn a subject not offered by their school.
6. Senior citizens are feeling a sense of worth and usefulness by teaching some of the skills and talents they have acquired during the course of their lifetime.
7. People seeking recreation are finding partners and competitors, as well as teachers, in more than 125 games and sports.
8. College students are locating experts in business, industry, government, and social agencies who are willing to provide personal knowledge and direction—thus expanding independent study opportunities and supplementing printed resources when students are writing research papers.

9. Libraries, park districts, and community colleges are finding resource people to expand their programs and they are also publicizing their classes, workshops, and activities through TLE in order to inform more people about their educational programs.
10. Program chairpersons of church, civic, and service organizations are finding guest speakers for their meetings.
11. People who need fast answers to isolated questions use TLE as a "telephone encyclopedia" by getting the names of resource people registered in the appropriate subject area and calling them on the phone for their advice, input, and answers to questions.
12. Schoolteachers are finding resource people from the community who are willing to visit their classrooms to share a skill, talent, or body of knowledge with students.

The number of subjects listed with TLE and the different uses devised by both individual and institutional clients will probably continue to grow as more people become aware of TLE approach to education. Already, after only six years of development, TLE has become the largest and most diversified community-based educational program in the United States.

PURPOSE OF THIS BOOK

During the past six years, more than 80 models similar to TLE have been established by independent groups throughout the United States. At the time of this writing only 11 are still in operation. Such a high failure rate of listing and referral services is quite disconcerting for anyone who recognizes the vast potential of this inexpensive, individualized, non-institutional, people-to-people educational process.

This book is written for individuals and organizations that are either involved in the development of an educational/recreational listing and referral service or that want to establish such a service for their community. It is the hope of TLE that this book will help eliminate the costly and inefficient "reinventing of the wheel" which has characterized the evolutionary development of listing and referral services to date.

While many of the methods and techniques that are outlined in this book seem to work in a large metropolitan area like Chicago, it should be emphatically stressed that they might not necessarily work in your specific area. In other words, what is effective with TLE's operation may not be effective with yours. On the other hand, what has not worked for TLE, may work for you.

The reader of this book should keep in mind that TLE is still in the "Wright Brothers" stage of development. True, the program is "off the ground," but it still has quite a way to go before the full potential of

the model is realized. During the coming years, TLE hopes to obtain the necessary financial resources that will make full development a reality. As the program continues to grow, as new problems surface, as new solutions are found, the methods and techniques outlined in this publication will probably become increasingly obsolete. The reader is therefore cautioned to look upon the information in the following chapters as only a "primitive beginning."

As a sequel, TLE will attempt to find a way to periodically update the information in this book. Keep in touch with TLE to find out what progress is being made in this regard.

CHAPTER I

INITIAL STEPS

INTRODUCTION

As with the establishment of any type of business, organization, or community service, there are a number of decisions you'll have to make as well as tasks you'll have to perform prior to the founding of your listing and referral service. This chapter will outline, in rough chronological order, the initial steps necessary for establishing a program similar to TLE.

Please keep in mind that the information in this book applies to the establishment of an independent, not-for-profit corporation. If you intend to set up your program on a for-profit basis, you will have to seek legal advice in order to make the necessary alterations that would apply to your program. Also, if you intend to become a part of an existing institution, you'll want to consult the administrative and legal staff of your sponsoring agency so you can determine the best way to proceed.

CORE GROUP

The deeper you get into the establishment of your program, the more you'll appreciate the complexities of developing and operating a listing and referral service. It is not as simple as it might appear, and you'll need to have a core group of dedicated, competent people in order to make the program a success. As you'll see in the later sections of this book, you'll have to find people with expertise in the following areas: business management, accounting and bookkeeping, advertising, marketing, fund raising, public relations, writing, photography, graphic design, and systems design.

Most listing and referral services, to date, have been founded and operated by a predominantly volunteer staff. Such was the case with TLE until the latter part of its second year of operation. At that time TLE started to make the transition from volunteers to paid staff. Presently, TLE has a paid staff of nearly 20 people and only a handful of volunteers.

There are two basic reasons why TLE shifted from a volunteer staff to a paid staff. First, as a listing and referral service begins to serve more people, the need for a tightly-knit, highly systematized internal structure becomes increasingly important. In order to provide a quality service, the organization has to be able to depend on staff members who

are punctual, reliable, professional, and courteous, even when extremely busy or pressured. Over the years, TLE has found that paid staff members tend to meet these needs of the organization more readily than do volunteers. Second, from a cost/benefit viewpoint, the amount of time required to recruit, train, and coordinate volunteers (as well as cope with a relatively high turnover rate) was not commensurate with the volunteer program's overall benefit to the growth and development of TLE.

Of course, during the initial stages of your development, volunteers will probably be a necessity. But as your organization matures, as your internal systems become increasingly sophisticated, you may very well want to rely more on paid staff than you will on volunteers.

The chapter on Management will discuss in more detail the roles and responsibilities of the various staff members needed to operate a listing and referral service.

GAME PLAN

After you have identified a group of people to work on your project, hammer out a preliminary game plan. First, establish your goals (the goals of TLE are listed on page 2). Second, outline the objectives you must achieve in order to reach your goals. Third, develop a set of strategies and timetables for achieving the objectives. Finally, construct some type of an evaluative scheme so you can gauge your effectiveness in meeting the objectives. During this early planning stage you will find it most advantageous to have someone familiar with business management to assist you.

As you read through the following chapters, you'll get a fairly comprehensive idea of the kinds of objectives and strategies you'll need to formulate in order to develop a successful listing and referral service.

ORGANIZATIONAL NAME

One of the most critical decisions you'll have to make in establishing a listing and referral service is determining an appropriate name for your organization. The name you choose has the potential of "making or breaking" your program.

While it would be inadvisable for TLE to give you a list of names from which to choose (it might hamper your creative process), some suggestions for finding a name can be offered. You can start by having a name-finding brainstorming session with your core group. List all the possible names your group can think of on a blackboard. Ask some of the following questions in order to sort out those names which don't have much merit:

- Is the name descriptive of the service?
- Is it too esoteric?
- Is it too bland?
- Is it attention-getting?

- Would it be easy or difficult to develop a communication program around this name?
- Are there any groups which might be offended or turned off by this name?

After you have decided upon a name, you may want to have your legal counsel seek federal and/or state registration of your name. If you don't protect your name, you may someday experience difficulties with other groups taking the name and either failing, misconstruing the purpose, getting embroiled in legal hassles, or competing with you for publicity, funding, and/or participants under detrimentally confusing circumstances.

One piece of advice that can definitely be given is: do not call yourself "The Learning Exchange," or use "Learning Exchange" in your name, or refer to your organization as "a learning exchange." THE LEARNING EXCHANGE, TLE, and the TLE Logo are trademarks of THE LEARNING EXCHANGE and the use of these without written authorization is strictly prohibited. Moreover, the name is a poor one. As a public image, it is misleading, inaccurate, and limiting. The word "learning" doesn't cover all of the other things you can do through such a service, for instance -- teach, share an interest, start a club, find out specific information, join a discussion group, etc. Also, many people still have negative connotations with the word "learning," undoubtedly as a hangover from school. The word "exchange" suggests to most people that in order to learn something they must teach something, or vice versa. This notion prevents many people from even picking up the phone and calling for more information.

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In addition to possible thousands of "lost callers," precious advertising time and space have been wasted in attempting to clarify what TLE really is. TLE would probably change its name if funds were available to establish a new name, modify printed materials, and "undo" more than six years of publicity and name-identification among participants, funders, and media personnel. Unfortunately, it is estimated that at least \$100,000 would be needed to make the transition effectively.

So please, don't duplicate TLE's mistakes. Put a lot of thought—and possibly market research—into your choice of a name for your organization.

INCORPORATION AND TAX-EXEMPT STATUS

In order to become a legal entity, you'll have to file an incorporation application with your state. To do so, contact the state office in your city to obtain the necessary directions and forms for becoming a not-for-profit corporation. You will probably need your lawyer's assistance in completing the application form.

After you have become incorporated in your state, the next step will be to apply for a tax-exempt status with the federal government. A tax-exempt status will enable you to: 1) obtain a non-profit mailing permit which will vastly reduce your postage expenses on mass mailings;

2) purchase materials and equipment without having to pay state excise tax (at least, in Illinois, this is true); and 3) inform your donors that whatever contributions they make to your organization can be deducted from their federal income tax. To obtain the necessary forms, contact the Internal Revenue Service (IRS) in your city or state.

The length of time involved in these two steps will vary from state to state. TLE received its not-for-profit incorporation approximately one month after submitting the application and its tax-exempt status nearly three months after filing the necessary forms. It is important to begin proceedings as soon as possible, for you cannot apply for a tax-exemption from IRS until your organization has become incorporated on the state level; and most corporations and foundations will not make contributions or grants to your organization until it has officially attained a tax-exempt status.*

Upon receiving your tax-exempt status from IRS, contact the appropriate authorities in your state office and request a letter which verifies that your organization is exempt from having to pay excise tax on materials and equipment. Since some salespeople request a copy of the letter when you make a purchase, be sure to make a few extra copies. It will be worthwhile for you also to make copies of your approved incorporation application as well as the letter you receive from IRS which states that your organization is tax-exempt. (As you'll see in a later chapter, each time you submit a fund raising proposal to a corporation or foundation, you'll have to include a copy of your IRS tax-exemption letter.) As a precautionary measure, you should obtain a safe deposit box at a local bank for the safekeeping of all the original copies of the above documents.

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BASE OF OPERATION

As was mentioned in the introduction, a listing and referral service does not require a vast amount of space in order to serve the public. You'll need one fairly large office for your information systems, phones, and telephone resource counselors. If possible, you should also have a separate room for storage and a few small offices for staff members working on such tasks as fund raising, publicity, organizational planning, etc.

If you want to provide a meeting place for your clients, you can expect that your space needs will increase immensely. TLE has chosen not to provide clients with meeting facilities for three primary reasons. First,

* There is, however, one way you can legally receive funds from a corporation or foundation prior to obtaining your tax-exempt status. It is through an existing not-for-profit organization that does have a tax-exempt status. Ask your lawyer about the procedure for channeling contributions through a third organization.

it would increase TLE's operating expenses. Second, a substantial amount of staff time would be required to coordinate and schedule the activities. Third, most people are creative and resourceful enough to find existing, often underutilized, space. TLE participants are meeting all over the city—in homes, apartments, churches, libraries, community centers, business offices, parks, restaurants, etc.

Many listing and referral services seem to find inexpensive space in churches for establishing their base of operation. When searching for a possible location, you may want to contact pastors in your neighborhood to see if they might have some space available.

TELEPHONE INSTALLATION

After you have a location, you'll want to install a set of telephones. It would probably be best for you to have two basic phone numbers—one that is communicated on all your promotional materials and the other reserved for such activities as fund raising, publicity, and other support activities necessary for developing and maintaining a listing and referral service. (You want to avoid the situation in which a foundation representative wants to ask a question about the proposal you submitted and can't reach you because your publicly-advertised number is busy.)

When ordering your phone number (for public advertising) from the telephone company, try to obtain a number that is easy to remember or that spells an appropriate word or phrase (e.g. 666-6000 is better than 653-8724; 266-6328 spells "CONNECT"). Also, to allow for growth, you should make arrangements with the phone company for reserving a series of five to ten lines which can easily be "bumped down" to the phone number you obtain. Many telephone companies have a free service which determines the number of calls you miss because of busy lines. As your organization grows, you'll want to avail yourself of such a service and add your reserved lines as the situation demands.

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CONCLUSION

Completing the steps outlined above will provide you with a foundation on which to build an ongoing public service for your community. The careful consideration you give to such important items as the people you choose to help with the project, the organizational name you select, and the game plan you develop will have a large influence on the way in which your program evolves during its initial years of operation. In this early stage of development, it would probably be advantageous for you to proceed in a gradual and cautious manner. Whenever you have any major policy decisions to make, be sure to look not only at the short-term effects of these decisions, but also try to envision their long-term implications for your organization. The following chapters will provide you with a substantial amount of information indicating how and why TLE made some of its more critical policy decisions. It is hoped that your group can benefit from TLE's correct decisions as well as profit from the incorrect ones.

CHAPTER II

INFORMATION SYSTEMS

INTRODUCTION

The core of an effective educational/recreational listing and referral service is the information systems used for data input, storage, and retrieval. The quality of the service is largely a function of the accuracy, completeness, and accessibility of information stored in the data base. When TLE first began operation, the information bank was nothing more than a shoe box filled with a hundred blank 3x5 index cards. Since then, it has evolved into a set of five rather sophisticated filing systems filled with more than 70,000 index cards.

At the time of this writing, TLE is in the process of converting the five filing systems into a comprehensive computerized data processing system. The new system will employ the use of a computer time-share service, a computer terminal, microfiche readers, and microfiche that will replace the 3x5 cards. After the computerization program is completely designed, tested, and operational, TLE will be able to assist other groups in the development and implementation of similar data processing systems for their programs.*

In the meantime, if you intend to establish a listing and referral service, the information contained in this chapter will aid you in developing relatively inexpensive data input, storage, and retrieval systems necessary for you to get started. The five basic systems described in this chapter include the 1) Master Card File (active and inactive), 2) Teacher Card File, 3) Learner Card File, 4) Interest-Match Card File, and 5) Feedback Card File.

* The process and approximate costs for having your own data processing system similar to TLE's are as follows: a) open a time-share account with General Electric (\$100 one-time charge); b) receive on-site training at TLE for use of hardware and software, purchase user manual, obtain copies of coding sheets (available at cost); c) purchase computer terminal, microfiche reader, and initial supplies (\$2,000—can be as low as \$200 if terminal can be leased or borrowed); d) key-in initial files or set up blank files (\$200 for a new organization—if not new, it will cost more depending on the size of the data base); and e) receive bi-weekly updates of client listings, feedback information, mailing labels, and statistical data (\$200 per month for a moderate-sized operation). Based on all available data, the start-up costs of computerizing listing and referral services will average \$4,000 - \$7,000. This amount is less than 10% of the \$77,000 FIPSE grant originally needed to develop the prototype—a good example of federal dollars well-spent.

MASTER CARD FILE

When Mr. John Doe, a first-time caller, contacts TLE, the telephone resource counselor provides him with a verbal description of the program (see pp. 73-78) and mails him a membership/registration application form along with additional information about TLE (see pp. 79-87). At the time of Mr. Doe's first call to TLE, the resource counselor partially fills out a Master Card as described below (the other sections of the card will be filled in at a later date).

BLANK MASTER CARD

Name		I	
Address Line 1		V	
Line 2		M	
City	State	Zip	Zone
Hm Ph /	Wk Ph /	Where Heard	
Best Time	Best Time		
Teacher Cards	Learner Cards	Interest Cards	
		,	
		,	
		,	
			Staff

PARTIALLY COMPLETED MASTER CARD

Name John Doe		I	6/1/77
Address Line 1 615 Case Place		V	
Line 2		M	
City Evanston	State IL	Zip 60202	Zone 1
Hm Ph 3/2 /360-3312	Wk Ph 3/2 /290-4420	Where Heard	
Best Time ^{weekday} _{evenings}	Best Time days		
Teacher Cards	Learner Cards	Interest Cards	
			Staff B.J.

While some of the completed sections are self-explanatory, seven sections do require further comments at this point.

- 1) Name - The individual or organization requesting information.
- 2) Address Line 1 - Use if: a) there is only a home address for the person (in which case leave Address Line 2 blank); b) the person has given you the name of his or her business or organization because he/she wants mail delivered at work; c) the "Name" is a business or organization and there is a contact person to the attention of whom mail should be addressed.
- 3) Address Line 2 - Use for street address in cases "b" and "c" described in #2 above.
- 4) I - The date of Mr. Doe's initial call to TLE is recorded in the "I" box ("V" and "M" will be discussed on p. 15).
- 5) Zone - "1" represents the geographic zone in which Mr. Doe resides. If the area you serve is large, it should probably be divided into a logical breakdown of geographic zones. The development of some type of geographic grid will help you match your clients with others close to their homes. One way to do this is through an arbitrary breakdown of your service area, as in the zone maps used by TLE (see pp. 88-89). You might instead want to base your zoning system on a map of your area which includes coordinates.
- 6) Where Heard - TLE telephone resource counselor tries to determine exactly where Mr. Doe heard about the program. This information helps TLE determine the effectiveness of its publicity efforts.
- 7) B.J. - Initials of telephone resource counselor (or you may want to use an individualized two-character number or letter/number code for each resource counselor to eliminate confusion in the event of duplicate initials, e.g., Betty Johnson and Burt Jones).

After Mr. Doe's Master Card is filled out, a packet of information is addressed to him, which includes a membership/registration application stamped with the date of his call. The card is then placed in a holding pattern—the Inactive Master Card File—which is organized by date (and by alphabet within each date).* Mr. Doe's card stays in this file until he returns the membership/registration application. He cannot use the listing and referral service of TLE until he does so. This procedure serves as a modest security measure to help verify Mr. Doe's name and address.

Upon receipt of Mr. Doe's membership/registration application, his Master Card will be transferred from the Inactive Master Card File to the Active

*The Inactive Master Card File is organized by date so that follow-up mailings can be done more easily (see p. 59 of Chapter VI).

Master Card File, which is alphabetized on the basis of last names. During this transfer process, another date is added to Mr. Doe's Master Card—if he becomes a supporting member of TLE, the date is written in the "M" (Member) box—if he registers to use the listing and referral services of TLE free of charge, the date is written in the "V" (Verified Registrant) box. Also, the date and amount of any contribution is recorded on the back of the Master Card. Finally, statistics are taken regarding Mr. Doe's zone, amount of contribution, if any, "where heard," and sex.

Mr. Doe's completed membership/registration application is stored in an alphabetical file to be used to confirm Mr. Doe's membership/registration should his Master Card be misplaced. The membership/registration applications also serve as records of contributions received, as required by the IRS.

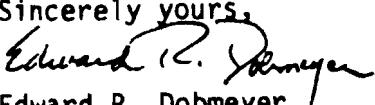
If Mr. Doe had decided to become a member, he would be sent his membership benefits and a letter from the Executive Director (see p. 90). If he had decided to become a verified registrant, he would be sent the post card illustrated below.

NEW REGISTRANT POST CARD

Dear New Registrant,

Welcome to The Learning Exchange! Your registration form has been received and processed. You are now entitled to use The Learning Exchange anytime during our 68-hour week (Mon.-Fri. 9 am-9 pm; Sat. 9 am-5 pm). Just give us a call at 273-3383 to let us know what you want to learn, teach, or share.

Thanks again for registering with The Learning Exchange. We look forward to serving you soon!

Sincerely yours,

Edward R. Dobmeyer
Manager of Operations

TEACHER, LEARNER, INTEREST MATCH CARD FILES

Teacher When Mr. Doe calls TLE to use the service, the telephone resource counselor will ask his name, pull his Master Card from the Active Master Card File, and verify his identity by asking for his address and phone number(s). This procedure also helps keep the information on his Master Card correct and up-to-date.

If Mr. Doe wants to teach a subject, e.g., Welding, the resource counselor will fill out a pre-printed Teacher Card similar to the one below after determining that Mr. Doe wants to receive calls from learners.

SAMPLE TEACHER CARD

Topic		Zone
Description, Competency, & Level		
Name, City, & Zip Code		Phones & Best Time To Call
Date	Fee: Y N M	Willing To Travel
		Staff

COMPLETED TEACHER CARD

Topic Welding		1 Zone
Description, Competency, & Level Has been a welder for 16 years — willing to teach beginning through advanced — prefers to teach on a one-to-one basis.		
Name, City, & Zip Code John Doe Evanston, 60202		Phones & Best Time To Call 360-3312 (evenings) 290-4420 (days)
Date 6/10/77	Fee: <input checked="" type="radio"/> N M 5.00/hr.	Willing To Travel Yes - no more than 10 miles
		Staff B.J.

The following sections need additional explanation:

- 1) Topic - Insert the subject title most appropriate for Mr. Doe's offering. If there is another subject title that might apply to Mr. Doe's offering, be sure to make out a cross-reference card. For example, if Mr. Doe were registering to teach Judo, you should have a plain index card on file under Self-Defense that states, "See also—listings for Judo." You might want to consult a librarian for hints on cross-referencing.
- 2) "1" - Mr. Doe's geographic zone.
- 3) Description, Competency, & Level - A specific description of the subject, where and how Mr. Doe gained his knowledge and expertise in Welding, what level he'd like to teach, and any other information Mr. Doe would like to have conveyed to prospective learners.
- 4) Name, City, & Zip Code - A street address is not needed on this card since this information is not given to prospective learners unless teachers specifically indicate that they want their addresses given out.
- 5) Date - The date on which the topic card was filled out.
- 6) Fee - A circle is drawn around the appropriate letter to determine whether or not Mr. Doe intends to charge a fee (Y = yes, N = no, M = maybe)—teachers can charge by the hour, use a sliding scale, or negotiate a mutually agreeable fee arrangement with learners.
- 7) Willing to Travel - A comment is made as to whether Mr. Doe is willing to travel and, if so, under what conditions.
- 8) B.J. - Initials of telephone resource counselor.

After Mr. Doe's Teacher Card is completed, the telephone resource counselor will do the following:

- 1) Ask Mr. Doe if he wants the names and phone numbers of anyone who is waiting for a Welding teacher. If he says "yes," check the Learner Card File (see p. 18).
- 2) Print the word "WELDING" on Mr. Doe's Master Card in the box entitled "Teacher Cards"—this process enables TLE to find Mr. Doe's topic cards if he should change his telephone number, zone, or modify his listings.
- 3) Place Mr. Doe's Teacher Card in the Teacher Card File which is alphabetized on the basis of topic title, i.e., from Accounting to Zoology.* If there is more than one Welding teacher registered with TLE, all the Welding Teacher Cards are wrapped with a rubber

*see note on p. 20

band when stored in the Teacher Card File. Also, within the packet of Welding Teacher Cards, the cards should be placed in accordance with the geographic zone coding system in the upper right hand corner of the card, i.e., Zone 1 Welding Teachers Cards first, then Zone 2, and so on. Used in conjunction with a large office map of your zoning system, this procedure will help your telephone resource counselors quickly locate Welding teachers close to a learner's home.

Mr. Doe's Teacher Card will remain in the Teacher Card File until: 1) he asks that it be removed; or 2) a learner who received Mr. Doe's name reports that Mr. Doe is no longer interested in teaching Welding or that the information on his card is incorrect or out-of-date, in which case his card is pulled (at least temporarily) and Mr. Doe is contacted by TLE to confirm the learner's feedback.

Learner If Mr. Doe wants to learn a subject, e.g., Spanish, the process is somewhat different. After the resource counselor verifies Mr. Doe's identity (see p. 15), he is given the names, phone numbers, background information on Spanish teachers registered with TLE. A Learner Card is filled out for Mr. Doe only if TLE does not have suitable teachers on file or if he wants to always have a card on file under Spanish. A blank Learner Card is identical to a blank Teacher Card except that it should be a different color.* An example of Mr. Doe's Learner Card is illustrated below.

COMPLETED LEARNER CARD

Topic SPANISH		1 Zone	
Description, Competency, & Level Going to Brazil in November - wants to learn Spanish from a native speaker.			
Name, City, & Zip Code John Doe Evanston 60202	Phones & Best Time To Call 360-3312 (evenings) ----- 290-4420 (days)		
Date 6/10/77	Fees: <input checked="" type="radio"/> N M no more than \$5/hr.	Willing To Travel Yes - no more than 15 miles	Staff B.J.

* TLE topic cards, unfortunately, are all the same color. If TLE had to do it over again, pre-printed colored index cards would be used to help differentiate the five basic filing systems; e.g., Teacher Cards, yellow; Learner Cards, pink; Interest-Match Cards, green; Master Cards, white; and Feedback Cards, blue.

Perhaps the only part of the card that isn't self-explanatory is the "Fee" section. When the resource counselor fills out the Learner Card, Mr. Doe will be asked whether or not he is willing to pay a fee and, if so, how much.

After Mr. Doe's Learner Card is completed, print the word "Spanish" on his Master Card in the box entitled "Learner Cards." His Learner Card is then placed in the Learner Card File which is alphabetized on the basis of topic title.* Mr. Doe's Learner Card will remain in the Learner Card File until: 1) he asks that it be removed; or 2) a teacher who received Mr. Doe's name reports that Mr. Doe is no longer interested in learning Spanish, or that the information on his card is incorrect or out-of-date, in which case his card is pulled (at least temporarily) and Mr. Doe is contacted by TLE to confirm the teacher's feedback.

Interest-Match If Mr. Doe wants to find a tennis partner or competitor, the resource counselor checks the Interest Match Card File under Tennis and provides him with the names, phone numbers, and background information on other people expressing a similar interest. After Mr. Doe has been given this information, he is asked if he would like to have future callers interested in finding tennis partners and competitors referred to him. If so, the resource counselor fills out an Interest-Match Card similar to the one below.

COMPLETED INTEREST MATCH CARD

Topic TENNIS		1 Zone	
Description, Competency, & Level Looking for players on the intermediate level.			
Name, City, & Zip Code John Doe Evanston 60202	Phones & Best Time To Call 360-3312 (evenings) 290-4420 (days)		
Date 6/10/77	Fee <input checked="" type="radio"/> Y N M For court time	Willing To Travel Yes - 5 miles	Staff B.J.

After Mr. Doe's Interest Match Card is completed, print the word "Tennis" on his Master Card in the box entitled "Interest Cards." His Interest Match Card is then placed in the Interest Match Card File which is alphabetized on

*see note on p. 20

the basis of topic title.* Mr. Doe's Interest Match Card will remain in the Interest Match Card File until: 1) he asks that it be removed; or 2) a caller who received Mr. Doe's name reports that Mr. Doe is no longer interested in playing Tennis, or that the information on his card is incorrect or out-of-date, in which case his card is pulled (at least temporarily) and Mr. Doe is contacted by TLE to confirm the caller's feedback.

*IMPORTANT NOTE: Before any new Teacher, Learner, Interest Match, or Feedback Cards are filed, they are first attached to Mr. Doe's Master Card and checked by the Manager of Operations or an Operations Assistant for legibility, accuracy, and completeness. This procedure provides an opportunity not only to monitor the progress and performance of part-time staff members but also to gather statistics on participant usage, and helps to maintain the quality of the service.

FEEDBACK SYSTEM

After Mr. Doe has been given information about Welding learners, Spanish teachers, and Tennis interest matches, the telephone resource counselor fills out Feedback Cards "A" and "B" and asks Mr. Doe to call TLE to report on how well the arrangements work out.

The pre-printed "A" and "B" cards used for the Feedback System are illustrated below.

BLANK FEEDBACK CARD "A"

NAME		<input type="checkbox"/> CHECK IF MEMBER	CALLBACK DATE	
PHONE/BEST TIME TO CALL	CITY	ZONE	2nd 3rd	
WE CALLED <input type="checkbox"/>	THEY CALLED <input type="checkbox"/>	GOTCHA <input type="checkbox"/>	RETURNED OUR CALL <input type="checkbox"/>	DATES DONE
TOPIC / NAME	TLE	SUG	COMMENTS	
NOTE ANY ACTION TAKEN FOR EACH SUBJECT LISTED AND ADDITIONAL COMMENTS ON REVERSE SIDE OF CARD				Staff

PARTIALLY COMPLETED FEEDBACK CARD "A"

NAME John Doe		<input checked="" type="checkbox"/> <small>CHECK IF MEMBER</small>	CALLBACK DATE 6/24/77
PHONE/BEST TIME TO CALL 360-3312 (evenings)	CITY Evanston	ZONE 1	2nd _____ 3rd _____
WE CALLED <input type="checkbox"/>	THEY CALLED <input type="checkbox"/>	GOTCHA <input type="checkbox"/>	RETURNED OUR CALL <input type="checkbox"/>
TOPIC / NAME		TU	SUN
Welding / J. Peterson		L	
Welding / E. Zillo		L	
Spanish / R. Jones		T	
Spanish / B. Thompson		T	
Tennis / J. Adams		I	
NOTE ANY ACTION TAKEN FOR EACH SUBJECT LISTED AND ADDITIONAL COMMENTS ON REVERSE SIDE OF CARD			
			Staff B.J.

COMPLETED FEEDBACK CARD "B"

Name John Doe	Callback Date 1 6/24/77
Check if Member <input checked="" type="checkbox"/>	2 3
Best time to call Evenings or days	
Staff B.J.	

The resource counselor fills in the following sections of Feedback Card "A" at the time Mr. Doe is given the names and phone numbers of referrals.

- 1) Name - Self-Explanatory.
- 2) Check if Member - For statistical purposes, a check in the box provided indicates that Mr. Doe is a supporting member.
- 3) Callback Date - A date two weeks from the day Mr. Doe was given names and phone numbers of referrals.
- 4) Phone/Best Time to Call, City, & Zone - Self-explanatory.
- 5) Topic/Name - The topics for which Mr. Doe received information and the names of referrals for each topic.
- 6) TLI - The topic file from which the referrals were taken—Teacher Card File (T), Learner Card File (L), or Interest Match Card File (I).
- 7) B.J. - Initials of telephone resource counselor.

All the remaining sections of Feedback Card "A" are left blank at this stage of the feedback process. The resource counselor also completes Feedback Card "B", all sections of which are self-explanatory. Then the "A" card is attached with a rubber band to Mr. Doe's Master Card and returned to the Active Master Card File and the "B" Card is placed in the Feedback Card File.* The Feedback Card File is set up on the basis of callback dates, e.g., all the clients whose callback date is 6/24/77 have their "B" cards in one section of the file followed by all the clients whose callback date is 6/25/77, and so on. Within each dated section the "B" cards are alphabetized in accordance with clients' last names.

If Mr. Doe calls TLE with feedback, the resource counselor first locates his Master Card in the Active Master Card File. Attached to it should be Mr. Doe's Feedback Card "A". Then the resource counselor adds Mr. Doe's feedback to his Feedback Card "A" as indicated below:

COMPLETED FEEDBACK CARD "A"

NAME John Doe		<input checked="" type="checkbox"/> MEMBER	CALLBACK DATE 6/24/77	
PHONE/BEST TIME TO CALL 360-3312 (evenings) 290-4420 (days)	CITY Evanston	ZONE 1	2nd 3rd	
WE CALLED <input type="checkbox"/>	THEY CALLED <input checked="" type="checkbox"/>	GOTCHA <input type="checkbox"/>	RETURNED OUR CALL <input type="checkbox"/>	DATES DONE 6/22/77
TOPIC / NAME	T.L.	S.U.	COMMENTS	
Welding / J. Peterson	L	S	Meeting twice a week	
Welding / F. Zillo	L	U	Phone disconnected	
Spanish / R. Jones	T	S	Learned how to tune-up VW	
Spanish / B. Thompson	T	O	Didn't call	
Tennis / J. Adams	I	S	Play every other Sat.	
NOTE ANY ACTION TAKEN FOR EACH SUBJECT LISTED AND ADDITIONAL COMMENTS ON REVERSE SIDE OF CARD				
				Staff B.J.

*see note in p. 20

The following sections need to be explained:

- 1) We Called—They Called—"Gotcha"—Returned Our Call - One of these boxes is checked upon receiving feedback to indicate the manner in which the feedback was obtained.
 - a) We Called - This box is checked if Mr. Doe is contacted by TLE on or after his callback date to obtain feedback.
 - b) They Called - This box is checked if Mr. Doe contacted TLE for the express purpose of reporting feedback, as in the example given on Completed Feedback Card "A" on p. 22.
 - c) "Gotcha" - This box is checked if Mr. Doe contacted TLE for a purpose other than reporting feedback, and the resource counselor obtained feedback from him on the topics listed on Feedback Card "A" which was attached to his Master Card.
 - d) Returned Our Call - If the resource counselor was unsuccessful in reaching Mr. Doe on or after his callback date to obtain feedback but was able to leave a message for him to call TLE, this box is checked when he returns the call.
- 2) Dates Done - The date(s) on which feedback is recorded.
- 3) SUO - If Mr. Doe defines his experiences as successful, an "S" is recorded in the appropriate box; if he defines the experience as unsuccessful, a "U" is recorded; and if he defines the experience as something other than successful or unsuccessful, an "O" is recorded.

After feedback is obtained from Mr. Doe, these procedures take place:
1) additional referrals (if available) are immediately provided to him in the event that his experiences were not successful; 2) the resource counselor follows up on any feedback indicating that there is incorrect or obsolete data (e.g., disconnected phone numbers) in the Master, Teacher, Learner, and Interest Match Card Files; 3) Mr. Doe's Feedback Cards "A" and "B" are removed from the files; and 4) the results of his experiences are tabulated to determine the effectiveness of the service.

If Mr. Doe does not call TLE with feedback by his 6/24/77 callback date (which, as stated earlier, is two weeks after he received the names and phone numbers of referrals), a resource counselor will pull all the Feedback Cards "B" from the 6/24/77 section of the Feedback Card Files and will call Mr. Doe along with all the other clients who received referral information on 6/10/77 and have feedback outstanding.

In essence, the feedback system developed by TLE provides a way to pinpoint areas of the service that need to be improved as well as areas that are operating effectively. Information collected through the feedback system is also used in TLE's newsletter, PEOPLEPHILE (see pp. 104-106), proposals, etc. Most importantly, the feedback system is the primary

means by which TLE keeps the information in the data base accurate and up-to-date. A comprehensive feedback system, therefore, should be an integral part of any listing and referral service.

CONCLUSION

What started out as a simple shoe box containing a hundred 3x5 index cards has indeed become a rather complex set of information systems and processes. The demand for expanding the scope of the program, increasing client size, and improving the quality of the service has made it necessary for such complex systems to be developed. It is hoped that your organization can, in some way, benefit from the work TLE has done so far in this area.

As mentioned earlier, TLE is now entering a new phase of development by designing a computerized data processing system suitable for a listing and referral service. This work is made possible through a grant from the Fund for the Improvement of Postsecondary Education (DHEW). Through this effort, TLE will be able to begin to explore the full potential of a people-to-people referral service as well as provide direction for listing and referral services whose actual or hoped-for client size makes a computerized data processing system more efficient and effective or, as in the case of TLE, a necessity.

CHAPTER III

MEDIA PUBLICITY NETWORKS

INTRODUCTION

The ultimate success of a listing and referral service is largely contingent upon the number of participants in the program. More people actively participating in the service leads to more resources and offerings, thus increasing the likelihood that individual learners will easily find people in and around their neighborhoods who can help meet their educational and recreational needs. Based on the experiences of TLE and other similar programs around the country, it would be safe to assume that the more participants, the better the program. In addition, it seems that, generally speaking, potential participants feel much the same way; providers of goods and services have long attracted clients by advertising their volume/popularity (how many products sold; how many customers served; the idea of "We're No. 1," etc.).

It is therefore important to develop appropriate communication techniques for attracting large numbers of people to the program. In order to do so, considerable time and effort must be spent in developing and maintaining publicity networks through a variety of media. Moreover, particular attention should be given to the formulation of consistent messages appropriate for each publicity network. In this chapter, procedures for developing the necessary publicity networks will be outlined and principles involved in devising impactful messages will be described.

GENERAL CONSIDERATIONS

Perhaps the large number of participants in TLE can be directly attributed to the cooperation received from most of the newspapers, radio, and television stations in the Chicago area. During its first six years of operation, TLE was the subject of over 100 interview shows and news specials and more than 50 newspaper and magazine articles. This broad exposure did not come about by accident. In order to obtain it, TLE had to learn the intricacies of "media relations," e.g., who to contact at the media source, what to say, how to say it, and how to maintain appropriate follow-up.

TLE has found that a generally successful approach to media personnel includes the following five components: 1) research, 2) introductory letter, 3) initial telephone contact, 4) face-to-face meeting, and 5) periodic follow-up.

Research Before contacting any media people, try to find out something about them. Watch their TV news specials and interview shows. Listen to their radio call-in programs. Read their newspaper columns. Try to

determine their respective interests. To what kinds of organizations do they give exposure? What are their biases? Who is their audience? What features of your program do you think the media "decision-makers" and their audience would find appealing? Generally, the more information you have about a media person and his/her program or column, the better your chances of dealing effectively with that person and achieving your goal of getting your message across to large numbers of people.

Once the above data has been collected, set priorities. List all your possible media contacts and then prioritize them on the basis of who will give you the most "reach" (i.e., communicate to the largest number of people) and who you think would be the most receptive to your service. Establish a plan of action along with a calendar of events.

Introductory Letter Compose a letter that introduces you and your program to the media person (see sample letter on p. 91). In many cases you'll be able to use the same letter for a number of people; but whenever it seems appropriate, don't hesitate to modify your letter to fit the specific media person you're addressing. Keep your letter to one page. You are competing for the media person's time along with hundreds of other individuals, organizations, and public relations firms. A letter that is too long or that does not get the reader's attention immediately will usually end up in a wastebasket.

Perhaps the most important part of your letter is the first sentence. It has to be impactful! It has to grab them so they read the next sentence and the next and so on.

Along with your letter be sure to enclose some supplementary material—a newspaper article or a brochure that concisely communicates what your organization is all about. However, don't send too much supplementary material—it'll overwhelm them and their desks, and probably end up in the aforementioned wastebasket.

It is helpful to keep in mind that your letter, your letterhead, and the supplementary materials you choose to send tell a lot indirectly about you and your organization. With these items you establish a "first impression." Human nature being what it is, first impressions can frequently spell the difference between success and failure. Generally, the more professional your materials appear, the better reception they will get from media personnel (as well as from most businesses, foundations, corporations, government agencies, institutions such as libraries and schools, and even the general public—the latter if you're striving for broad-based support and participation); and, again, the less likely your materials will end up in the wastebasket.

There are three items that should be in all introductory letters. First, if you are incorporated in your state as a not-for-profit organization, be sure to mention it. Your incorporation helps to establish your legitimacy; and with the majority of media people, "legitimacy" is critically important. Second, if the services you provide to the public are free, be sure to inform your reader of that fact. Perhaps one of the main reasons TLE has received so much free publicity is that Chicago media

has been prone to support organizations that provide free services to area residents. Third, be sure to mention that you will make the next move. Indicate in the final paragraph of the letter that you will telephone them on a specific date to discuss your idea in more detail. TLE has found that with media people, it is best to set a date within 7-10 days of the mailing of the letter. Finally, be sure to make carbon copies of your introductory letters and keep a record of the supplementary material you send along with them. Needless to say, it is a good idea to keep a file folder for each media source you develop.

Initial Telephone Contact Before making your initial phone call to a media person, review the materials you have in your file folder on that specific TV or radio program, newspaper, etc. (i.e., the data you collected on the media person's interests, the carbon copy of the introductory letter you sent, etc). It will also be helpful to jot down a brief outline of the major points you'd like to emphasize in your phone conversation. Organizing yourself on the front-end will improve your effectiveness.

Be sure to have a pen and pad of paper for taking notes during the conversation. You'll want to record your general impressions for future reference—what did they like about your program, what appeared to make them feel uneasy, etc. Be sure to also record the name of the person with whom you spoke. Date these notes and insert them in your file (and, if your organization is fairly new and/or fluid, sign your name to the notes). Such a procedure will help to refresh your memory when you are in the Follow-Up phase of the publicity network development process.

Contact the person on the date you specified in your introductory letter. The initial part of your phone conversation might start something like this: "Hi. I'm _____ from _____. About a week ago I mailed you some information describing the work our organization is doing. We thought some of your (viewers, listeners, readers) could benefit from our not-for-profit services and that you might want to help make them aware of some of the opportunities that are available." After such an introductory statement, it's then just a matter of answering their questions and responding to their comments as well as suggesting what you would like them to do to help spread the word about your program. (The "homework" you did in the Research stage will aid you in suggesting something appropriate, e.g., a specific show, article, or column.)

Perhaps the most important goal you should have for this telephone conversation is to motivate the media person to meet with you so you can personally describe your program in greater detail. Essentially, you're attempting to get them more and more involved in your program—the more involved they become, the more help you can usually expect from them. Unless someone responds immediately to your program, you'll find that obtaining their involvement is a long, gradual process.

Face-to-Face Meeting

Once you get to the face-to-face meeting stage, your chances of success

are quite high. The media person thinks enough of you and your program that he/she is willing to invest some time to learn more.

At this stage there are two important considerations you should keep in mind. First, just as your letter, letterhead, and organizational materials set a "first impression" for you and your program, your face-to-face meeting tends to set a "lasting impression." It is to your advantage to look professional, talk professional, and be professional. In fact, the more you look like and talk like the media people you are dealing with, the better are your chances of achieving your objectives. Generally, a scraggly beard and blue jeans tend to make your task more difficult.* Media people, like most people, tend to relate better to "their kind." While it might be considered a sad commentary on human nature, it's still a fact of life. So if you're serious about promoting your program, making it successful, and serving large numbers of people, you'll have to be flexible and adaptable enough to wear a "variety of hats."

Second, during your phone conversations and face-to-face meetings there is one quality that should characterize all your interactions—enthusiasm. Enthusiasm is contagious. If you are enthusiastic about your program, generally you can get others to become enthusiastic also. And if you can encourage people in the media to become enthusiastic about what you are doing, it's a fairly safe bet that that enthusiasm will be communicated to large numbers of people—their listeners, viewers, and readers.

Follow-Up In order to maintain rapport and keep you and your organization from getting "lost" in the midst of the hundreds of other groups in your city competing for exposure, it is important to stay in contact with media people. A day or two after your face-to-face meeting, it is a nice gesture to follow up with a pleasant "thank you" letter (see p. 92 for sample letter). About a week or two after an "on air" interview or newspaper article, it is a good idea to send a "thank you" letter which includes a personalized progress report of what has happened as a result of the media person's help, e.g., how many new people contacted your office, what kinds of requests they made, how you helped them, etc. (see p. 93 for sample letter). Your objective is to make sure the media people feel appreciated and important. The better you make them feel about their involvement in the community through your organization, the more exposure they're likely to give you in future months and years.

The above guidelines should help you in your general interactions with media personnel. Now it is time to look at the specific ways you can take advantage of the various media.

* Back in 1971, one of the co-authors of this book discovered this phenomenon from first-hand experience.

RADIO

All commercial radio stations have a mandate from the FCC (Federal Communications Commission) to provide occasional air time for not-for-profit organizations in the form of P.S.A.s (Public Service Announcements) or public service programming.

P.S.A.s Basically, a P.S.A. is similar to the commercials you hear on radio stations. There are, however, two important differences between a commercial and a P.S.A.: 1) you don't have to pay for P.S.A.s; and 2) you have no control over the time of day or night your P.S.A.s are aired. Even though radio stations are obligated by the FCC to provide public service time to not-for-profit organizations, you have no guarantee that your organization will receive air time, as each radio station has total discretion regarding the types of organizations for which they air P.S.A.s. Your challenge, therefore, is to convince the radio station that the services you are providing have a redeeming social value, are designed to help make your city a better place in which to live, and deserve the right to be allotted some of their public service time.

To find out what is required of your organization to air P.S.A.s, you'll have to telephone the public service director at each station. You will want to find out: 1) the length of P.S.A.s the station airs—usually 10, 15, 20, 30, and/or 60 seconds; 2) how often the P.S.A.s should be updated; 3) whether or not the P.S.A.s should be taped or typed; and 4) any other special requirements the station might have. When composing your P.S.A.s, you should have approximately 25 words of written copy per 10 seconds of air time (see pp. 94-98 for sample P.S.A.s).

Public Service Interviews Almost all radio stations have public service programs in which hosts from the stations interview community leaders from a variety of institutions, organizations, and neighborhood groups. Since an educational/recreational listing and referral service represents one possible solution to a series of social and educational problems, most radio stations should be inclined to grant your staff members an interview. Public service programs are usually pre-taped and then aired early in the morning or very late at night on weekends. Even though interviews in such time slots don't have much reach, they do attract some people to your service.

To improve your effectiveness during the interviews, you should try to develop your presentation so you're sure to communicate the following points: 1) how your program works; 2) how people have been benefiting from your services—try to use the actual experiences of your clients; and 3) most importantly, how listeners can contact you. In regard to the final point, be sure to emphasize your phone number and hours of operation instead of your mailing address. You'll have a much better chance of motivating people to use your service if, when they contact you, you can talk with them personally on the phone rather than just send them printed information in the mail.

Aside from the new people who contact you as a result of your radio interview, there are two favorable by-products of your radio appearances.

First, they give you the opportunity to develop closer relations with some of the people at the radio stations—from these closer relationships you can usually expect preferential treatment in regard to P.S.A.s. Second, the more air time your organization receives, the more established and legitimate it becomes in the eyes of clients, potential clients, funders, and other media people.

Call-In Shows Many stations have a telephone call-in show whereby listeners are invited to communicate on the air with the talk show moderator and/or guest(s). Usually more people listen to call-in shows than public service programs. Therefore, the reach is much better and it's to your advantage to acquaint the moderator with your program. Your main objective is to get the moderator to either invite you on the show as a guest (thus affording you the opportunity to respond to listeners' questions on the air) or invite you to call in while the show is in progress and describe the services your organization offers. If you are fortunate, you may also be able to work out an arrangement whereby the moderator will permit you to call in regularly either to give a progress report on your organization's development or to indicate some of the subject areas in which you have or need teachers or interest-match resources.

TELEVISION

Just as radio stations are required to provide P.S.A.s and public service programming for not-for-profit organizations, the FCC also requires the same of commercial television stations. Generally, your approach with television stations will be similar to that of radio stations—the few exceptions are described below.

P.S.A.s There are two basic types of television P.S.A.s: 1) videotaped or filmed with sound included, and 2) color slides with "live" copy (an announcer from the station will read your written copy while the slides are being shown on the screen). Public service directors generally prefer that you submit the first type. While color slides and live copy P.S.A.s are less expensive for you to produce, they do make the public service director's job more difficult—and anytime you make their job more complex, you can expect less air time.

The production of television P.S.A.s should be a high priority item for your organization. Properly produced, they will probably be one of your most effective communication tools for educating the public about your service. If you do not have the necessary financial resources to produce filmed or videotaped P.S.A.s, you might try to identify a corporation, advertising agency, or a television station that would be willing to help you in this effort. However you do it, be sure to seek professional assistance, because the higher the quality of your P.S.A.s (color contrast, composition, action shots, stimulating copy, creative sequences, etc.), the more likely you are to receive air time from television stations in your area.

Interview Shows Almost all television interview shows have at least two people involved in the running of the program: the "talent" (television jargon for the host or hostess) and the producer, who is responsible for finding and screening interesting people for the talent to interview. For shows that have producers, it is usually good politics to work through them rather than through the shows' talent.

When negotiating with a producer, you might want to mention that you'd be willing to bring one of your more interesting teachers on the show. Producers are usually amenable to that idea. You'll also find that people who actually use your service will be able to help you communicate to the viewing audience what your service is all about—people helping people. Moreover, they can praise your program from the viewpoint of a participant, whereas your praise of your program might be perceived warily and as "tooting your own horn." Be sure, however, to choose someone who is articulate, makes a good impression, and has a fairly solid understanding of how your service operates.

Before going on any television interview shows, try to arrange to have your telephone number televised during the broadcast. One way to do this is to ask the television station if they can prepare a "super" for you. Another way to do this is to prepare a 35 mm. color slide which displays your logo, the name of your organization, and your telephone number. Make a dozen or so duplicate copies. About ten or fifteen minutes before going on the air, give a copy of the slide to your interviewer and ask if it might be possible to televise the phone number for a few seconds during the interview. Tell your interviewer that you have found that about twice as many people will contact your office when they see the phone number in addition to hearing it mentioned during the interview.

With both radio and television interview shows, you ought to make it a common practice to have someone tape record any program in which staff members from your organization participate. After the interview shows, you can use these tapes to critique those involved in the interview. You should constantly be trying to improve and refine your answers to interviewers' questions. You should be striving to get your message as concise (yet complete) and impactful as possible. Tape recordings of the interview shows will be very helpful in this regard. Also, you'll probably want to keep a recording of each show for your organization's archives.

News Specials In addition to interview shows, you should try to get your local television stations to do occasional 3-5 minute news specials on your organization's activities. The key person to contact is the news director, who customarily assigns stories for news reporters to cover. Or, if you or someone in your organization knows one of the television station's reporters (e.g., education reporter, consumer reporter, etc.), you might try to approach him/her instead. Reporters frequently suggest news feature stories to the news director. As your program develops, you'll find that your resource files will become full of potential feature stories that may be of interest to topical reporters.

Public Broadcast Service (PBS) Television Your local PBS television station (formerly known as "educational television") may be able to provide you with ways to inform their viewers about your services. For example, WTTW-TV, Chicago's PBS station, has been airing daily 30-second announcements for TLE since 1975. This arrangement was made as a result of a brainstorming session that TLE staff members had with a few key personnel at the station. There are a variety of ways you might work with PBS television, so it would be worthwhile for you to contact some key people at the station in your area. If your city has cable television stations, you'll probably want to explore your options through them also.

PRINT MEDIA

There are seven general ways you can use the print media to help more people become aware of your services: 1) newspaper articles, 2) magazine articles, 3) free-lance writers, 4) consumer-type "action columns," 5) public service advertisements, 6) free newspapers, and 7) press releases.

Newspaper Articles During the initial stages of your development, you will probably find that journalists are fairly eager to write about your organization. Some will write general articles about your program, while others will want to write articles geared to a specific audience: e.g., a sports writer doing an article on the ways their sports-minded readers might use your service (see sample article on p. 99); consumer editors on all the low-cost educational and recreational opportunities available to their readers through your organization; and arts and crafts editors on the various activities their readers might get involved in either as teachers or learners.

Journalists will customarily interview you at your office. They are usually well-prepared and ask the standard "who, what, where, when, why, and how" questions. During the interview, you should always politely and tactfully remind them that you would appreciate their mentioning the phone number in the article so their readers can easily get in touch with your organization if they want to. Also, you'll find that journalists can write in one of two basic styles—informational and motivational. If there is anything you can do to encourage them to write a motivational article, by all means do so. You want people to pick up their phone to call you—a motivational article tends to accomplish that goal more readily than a simply informational article.

Magazine Articles As a result of the success of magazines like the New Yorker and Chicago, many cities are developing monthly publications that are geared to a local readership. If your city has such a magazine, be sure to contact one or more people on the editorial staff and solicit their help in informing their readers about your service through public service advertisements, free listings, feature stories, etc. You may also want to try for an article in specialty magazines, e.g., gardening, crafts, sports, consumer, as well as magazines that banks and savings and loan associations send to people who have accounts with them.

Free-Lance Writer Early in the development of your organization, you should locate and befriend a well-published free-lance writer. Such a person is usually "well connected" with key people in the print media and can usually be very helpful in getting exposure for your service. It shouldn't be difficult for you to develop a mutually beneficial working arrangement with a good free-lance writer. You provide the free lance with an interesting subject to write about (your organization and its multifaceted activities); the free lance gets paid by the newspaper or magazine; and your organization receives increased visibility at no charge to you.

Consumer-Type "Action Column" Many daily and weekly newspapers provide their readers with a column designed to help solve problems, track down an obscure piece of information, etc. Establish a good relationship with the editors of such columns. Your organization can help them respond to some of the requests of their readers and the editors can, in turn, help you get your message out to a large number of people (see p. 100). According to people in the newspaper business, action columns are generally the most well-read part of the newspaper after, of course, the front page.

Public Service Advertising Some magazines and newspapers, especially local neighborhood papers, will provide free advertising space for not-for-profit organizations. Generally, this space is very difficult to obtain and it would probably be wise to wait until your organization has established a one- or two-year track record before developing a strategy to obtain it. To date, TLE has run three public service advertisements (see p. 101 for sample ad). Unfortunately, not one of those ads has resulted in a large number of new callers. The reasons for this failure are not known, since many factors may have affected the ads' effectiveness. Aside from the possibility of ineffectual copy/graphics, these factors include the publications in which the ads ran; the location of the ads within those publications; and the possibility that people who see such ads do not call in as a direct result of those ads, or do not mention the fact that they saw such an ad. In any event, exposure through public service advertising can only help your organization by reminding and informing the public of your existence and by stimulating word-of-mouth publicity.

Free Weeklies Many cities have one or more free weekly newspapers. They are supported by commercial advertising and distributed at no charge to readers. Individuals may place notices in these free weeklies' large classified ad sections at no cost; not-for-profit organizations are charged only a nominal per line fee. The free weekly in Chicago is the Reader and it has attracted more people to TLE than any other print source. At the top of the next page is an example of a \$2.00 classified ad that has worked effectively for TLE.

SAMPLE CLASSIFIED AD

LOOKING FOR something to do? The Learning Exchange has more than 3,000 activities waiting for you! You can: learn over 50 languages, get into 100 different arts and crafts, play any one of 50 musical instruments, find partners and competitors for over 125 games and sports, plus much, much more. Call The Learning Exchange today for free information, 273-3383.

If you have a free weekly in your city, be sure to use it to help promote your organization.

Press Releases A press release is a written announcement that you prepare and submit to your local newspapers. It can be about recent or upcoming events in your organization—your first anniversary, the selection of new board members, the 5,000th person to use your service, the development of a new project, etc. (see pp. 102-103). Contact your local newspapers to find out their policies concerning press releases. If you have someone on your staff who is a prolific writer, you should strive to find something to write about at least two times a month. The more articles you have printed, the more your name is in front of the public, the more legitimate and established you will become in the eyes of people who are important to the success of your operation—your clients, potential clients, funders, media contacts, etc.

MAINTAINING PUBLICITY NETWORKS

After you have devoted much time and effort to establishing your publicity networks, you'll want to keep these networks open to your organization. In addition to the "thank you" letters previously described, you should be sure to send any newsletters, catalogs, or progress reports published by your organization to all your media contacts. Your objective is to stay in touch with your contacts, keep them informed of your progress, and most importantly, let them share in the excitement of your successful operation.

When newspaper and magazine articles are printed about your organization, send copies to your radio and television contacts. When you are going to be interviewed on radio or television, send a post card to some of your print media contacts and let them know about it. For obvious reasons, be careful not to send articles from one newspaper to journalists of another. Likewise, don't go out of your way to inform your radio and television contacts about all the interviews you have on other radio and television stations.

You'll probably find that after a year or two of intense media exposure, the novelty of your organization will begin to wear off. When this happens, a decrease in media exposure is likely to occur. In order to

counteract this decrease, you might try to establish a service like PEOPLEPHILE (see pp. 104-106). PEOPLEPHILE grew out of a successful attempt to develop mutually beneficial working arrangements with TV and radio show producers and journalists from Chicago area newspapers. In essence, the publication spotlights individuals throughout the Chicago area who have unique talents, unusual hobbies, and popular skills to share. If media personnel find someone in PEOPLEPHILE they would like to interview for an article or show, they simple call TLE to obtain his/her name and phone number. In return for this free service, the media person usually mentions TLE and its phone number, thus helping to inform more people about the service.

THE MESSAGE

According to some advertising experts, the average person in the United States is bombarded by approximately 1,600 messages a day—through billboard signs, radio and television commercials, newspaper advertisements, etc. You are prodded to buy this product, vacation in that country, use this service, and send for that catalog. Some businesses spend millions of dollars each month just to keep their message in front of you. Unfortunately, that's your competition. In getting your message to the public, you are competing with national corporations and all the businesses and service organizations in your community. Chances are, your advertising budget is either very small or non-existent. That's precisely why you have to spend so much of your time developing and maintaining a series of free or inexpensive publicity networks.

Along with the development and maintenance of your publicity networks, you should be extremely careful about the kinds of messages you formulate for each network. Below are a few guidelines you can follow when preparing copy for P.S.A.s and other types of advertising:

Emphasize your most popular subject categories — For example, TLE has found that people use the service more for languages, arts and crafts, musical instruments, academic tutoring, sports and games, and manual repair skills than for most of the other subject categories. To catch the attention of your listeners, find out what their interests are and tell them what they want to hear.

Use the second person, "You" — Instead of saying, for example, "People are using the service to teach, learn, and share their interests."; say "You can use the service to teach, learn, and share your interests." It's more direct and tends to involve your listener more personally.

Ask questions — Start your message with a question like, "What would you like to do this Spring?" Questions tend to involve your listeners in your message; and getting them involved in your message is a prerequisite for getting them involved in your program.

Keep it simple — Use direct, simple sentences. Steer away from the use of "educatorese" and ideological terms like "alternative" and "deschooling."

Be consistent — To maximize the impact of your total communication program you should, whenever possible, convey the same message through all media. Avoid communicating one theme on radio and another on television. Too many different types of messages will tend to dilute your overall communicative effectiveness.

Finally, in order to improve your copywriting ability, you should start analyzing much of the advertising that surrounds you in the print and electronic media. Becoming aware of the communication techniques employed by advertising agencies can assist you in formulating impactful messages for your organization.

CONCLUSION

The success of your organization will depend, in large part, on your ability to develop a variety of publicity networks as well as your ability to devise catchy and effective messages for motivating people to use your service. As mentioned above, the more people you have using your service, the better are your chances of meeting their needs. With an effective publicity campaign in the mass media, you should be able to attract the large number of people you need. In the next chapter you will find additional ways to help inform more people about your program.

CHAPTER IV

LOCALIZED PUBLICITY NETWORKS

INTRODUCTION

While your media publicity efforts will probably be the primary means by which you inform and attract people to your service, it will also be necessary for you to develop other free and inexpensive methods for delivering your message to the public. You can do this by establishing cooperative working arrangements with institutions, businesses, and organizations in your community. As you will see throughout this chapter, developing appropriate kinds of institutional interfaces will not only supplement and reinforce your media publicity efforts, but it will also enable you to expand the scope of your service, thus enhancing your ability to meet the educational and recreational needs of the people you are striving to serve.

Perhaps the most important consideration for you to keep in mind as you expand your publicity efforts and develop institutional interfaces is that no single method or technique will probably be very effective in isolation. To have an impactful communication program, you'll need a comprehensive approach which utilizes a variety of media. The more times your consistent message strikes people from different directions, the greater the likelihood of your motivating them to pick up their phones to find out more about your program. Some people will call your office after only one exposure to your message, others need ten or twenty exposures before they decide to make their first call.

LIBRARY MEMBERSHIP PROGRAM

In mid-1976, TLE initiated its first formal interface project, the Library Membership Program (LMP). The LMP was designed to provide specialized listing and referral services for library staff and patrons as well as enable TLE to disseminate promotional literature on a highly localized level (see pp. 107-110 for description of LMP). After twelve months of development, over 60 urban and suburban libraries have become supporting institutional members of TLE by contributing \$35 (in 1977, TLE plans to raise institutional memberships to \$50). Libraries that do not opt for an institutional membership still, however, have free access to the listing and referral services of TLE.

The LMP has become successful largely because of the following four benefits participating libraries derive from their institutional membership: 1) a workshop conducted by a TLE staff member describing ways in which librarians and library patrons can benefit from the referral services of TLE; 2) five copies of TLE catalog; 3) five copies of TLE's quarterly newsletter; and 4) printed information about TLE for

library patrons (see sample poster, bookmark, take-one, and lobby display on pp. 111-114).

In addition, member libraries (as with non-member libraries) receive: 1) access to TLE for locating experts willing to help conduct a variety of educational programs, exhibits, classes, etc; 2) a unique reference service which enables librarians and library patrons to find community experts willing to answer particular questions in the area of their expertise over the telephone; and 3) a listing service whereby special library programs and collections can be publicized through TLE's service, catalog, and quarterly newsletter to acquaint more people with the library's diverse offerings.

In terms of a mutually beneficial interface arrangement, the LMP is close to ideal: at a relatively low cost, each participating library can offer its clients the expanded services described above; TLE is provided with a community-based outlet for disseminating printed communication materials as well as a library staff willing to refer library patrons having specific needs or talents to TLE; and the program has a built-in self-support mechanism wherein TLE derives revenue both from the libraries through the voluntary institutional membership program and also from the library patrons who become supporting members of TLE.

As a result of the favorable response to the LMP and funds generated from the project, TLE is now in the process of expanding the program to additional libraries in the metropolitan area. It is anticipated that by the end of 1977 approximately 100 libraries will be participating in the program.

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If you would like to develop a LMP for your organization, you'll want to do all of the following: 1) identify an influential, progressive person in your city's library system(s)—possibly a system director or a library board member; 2) meet with this person and share your ideas for developing a cooperative working relationship between libraries and your organization; 3) develop a strategy for raising funds to help handle the front-end costs of designing and implementing the program (see pp. 125-128 for the proposal TLE used to raise funds for starting the LMP); 4) print promotional materials which will eventually be distributed to library patrons through libraries participating in your program; and 5) with the help of your key library contact (whom you may want to invite onto your Advisory Board), design a strategy for informing the head librarians in your city's library system(s) about the specialized services that are available to them through your organization.

COLLEGES AND UNIVERSITIES

In the near future, TLE plans to expand the LMP to include libraries of universities and colleges (including two- and four-year programs). You may want to do the same in your community. Perhaps the only difference between the public library program and the college library program will be that the publicity materials and workshops for library staff members will emphasize the ways in which college students have been benefiting from

the services of TLE. College students, for example, have been using TLE to: 1) find outside tutors for difficult subjects; 2) identify experts in business, industry, government, and social agencies who are willing to provide personal knowledge and direction for students who are seeking to supplement printed resources when writing research papers; 3) locate fellow students and other persons who can benefit from their skills and knowledge through one-to-one tutoring arrangements; and 4) pursue educational interests in subjects not customarily offered by their college or university.

Eventually, TLE hopes to establish additional working arrangements with postsecondary educational institutions in the metropolitan Chicago area which will enable colleges, universities, and other educational institutions to list their course offerings in TLE's computerized information bank. As a result of this kind of effort, prospective learners, when they call TLE, will be given not only the names and phone numbers of individual citizens in their neighborhood willing to teach the subject they are interested in, but also information about formal courses available through educational institutions near them. Learners will then be able to weigh all available educational options and select those which most closely meet their needs.

PARK DISTRICTS AND RECREATIONAL CENTERS

To date, TLE has not established an official interface arrangement with municipal park districts and other recreational organizations in the metropolitan Chicago area. There are over 100 such agencies and many of them offer some form of an educational program for community residents. Park districts and recreational centers can benefit from TLE in at least two ways: 1) they can publicize their classes, workshops, and activities through TLE in order to inform more people about their programs; and 2) they can find additional resource people to help conduct programs for their clients. The development of an interface project with recreational groups (similar to the LMP) would not only raise additional funds for TLE through the institutional membership program but it would also provide TLE with additional dissemination centers for the distribution of TLE publicity materials, as well as more referrals (resources) for TLE clients.

CORPORATIONS

In 1976, TLE attempted to establish a corporate membership program. The program was designed to: 1) extend the services of TLE to employees and retirees of Chicago area corporations; and 2) generate additional income for TLE (see pp. 116-121 for a description of the various corporate membership plans, individual and corporate benefits, and additional services offered to participating corporations).

While the design of the program appeared to be conceptually sound and positive feedback was obtained from corporate contacts who assisted in the program's early development, this enterprise did not achieve its

second goal regarding corporate subsidy of employee memberships. In spite of the positive relations TLE had developed with many Chicago area corporations, to date, none have become corporate members (as described on pp. 119-121) of TLE. The number of possible reasons for this are many. For example, the materials describing the corporate membership program were inadequate; the cost of membership was too high; corporate decision-makers were reluctant to take the risk of trying something new; most corporations may prefer to give cash donations to not-for-profit organizations rather than participate in any type of membership program for their employees; and the economic climate within the business community may have been less than favorable.

Regarding the first goal of the program, however, fifty corporations did agree to help acquaint their employees with TLE. The communication techniques used are outlined on p. 118. As a result of testing various communication approaches, TLE was able to identify two techniques that were impactful and cost-effective with corporate employees: 1) lobby displays with take-one literature (see pp. 113-114), and 2) the distribution of take-one literature through information packets customarily distributed to new employees. Contrary to original expectations, color slide presentations, in-house mailings, bulletin board posters, and articles about TLE in corporate newsletters were not very effective in attracting people to the program.

As a general rule it seems that corporate employees respond better when they actively seek out information (i.e., voluntarily pick up a take-one brochure from a lobby display), rather than passively being a recipient of information (i.e., receiving a take-one through in-house mail). This rule does not, however, seem to apply to new employees, since distributing take-ones through their new employee packets proved to be an effective technique. (TLE has also found that the new employee technique described above works in hospitals as well as corporations.)

If you want to develop communication programs with corporations in your area, the key person for you to contact (based on TLE's experience) will be either the Director of Public Affairs or the Director of Employee Relations. When you are negotiating with your corporate contacts about the communication program, you may want to ask that the company cover all or part of the printing bill as a donation to your organization. Don't, however, make such a request until after you are sure that your corporate contact is sold on your program. Finally, be sure to stay in touch with your corporate contact after you conduct your communication program. This person can be quite valuable to you when your organization is seeking a cash donation from the corporation.

PUBLIC SCHOOLS

For the past few years, TLE has been striving to develop some type of an interface program with public schools in the metropolitan Chicago area. Recently, The Chicago Community Trust awarded TLE a \$10,000 exploratory grant in order to get a program started. During the coming months, TLE

will be designing and testing ways to attract students, teachers, and parents of students to TLE's services. It is hoped that one or more successful techniques will result from these efforts.

On an informal basis, elementary and secondary school participants have already discovered a variety of innovative ways they can benefit from TLE. School teachers have been using TLE to: 1) find resource people from the community to visit their classroom to demonstrate a skill or discuss a specialized area of knowledge; 2) find individual tutors for children having difficulty with coursework; 3) conduct tutoring groups of their own during the summer months; 4) obtain fast answers to students' questions through the "telephone encyclopedia" aspect of the service—with one phone call to TLE, teachers can be put in touch with over 3,000 experts who are willing to answer questions in their area of expertise over the telephone; and 5) locate fellow teachers willing to discuss and share experiences, lesson plans, materials, and a variety of methods and techniques they have found to be effective in the classroom. Students have been using TLE to: 1) obtain first-hand career information from people employed in their chosen field of interest; 2) find experts in the community willing to share specialized information for term papers and independent studies; 3) help other students who can benefit from peer tutoring outside the school situation; 4) teach other children and adults a skill or talent they have acquired; and 5) form informal student groups for educational or recreational purposes. Parents have been using TLE to: 1) find individual tutors for children having difficulty with a particular subject; 2) locate people in the community willing to teach their children subjects that are not traditionally offered through the public schools; 3) share their skills, talents, and knowledge with both school children and other community residents; 4) design their own continuing education programs in accordance with their needs and time limitations; and 5) form informal parents groups to share and discuss effective ways to raise children.

SMALL BUSINESSES

Restaurants, book stores, record shops, craft stores, neighborhood banks, and a variety of other small business establishments can provide you with additional ways to deliver your message to the public. You'll find that many of the owners and managers of stores in your community are willing to let you place take-ones on their counters and/or posters in their windows.

When developing a distribution network for the dissemination of your promotional materials, it would probably be worthwhile for you to initially focus your energies on two or three neighborhoods where you expect to find a good reception for your service. TLE has found that communities with a college or university are good target areas. The same is true for communities in which numerous young professionals reside. (Approximately 50% of TLE's clientele are in the 20-35 age bracket.)

When approaching proprietors of stores in your target areas, you'll want to: 1) introduce yourself; 2) briefly describe your free service;

3) give them copies of one or more newspaper articles written about your program (this helps to legitimize you and your organization); 4) ask permission to place take-ones on their counters; 5) ask permission to place a poster in their window; and 6) keep a record of the proprietors' names, store names, addresses, distribution dates, and comments about their cooperativeness.

In the preliminary work that TLE has done in this area, five techniques were learned that may be helpful to you.

First, Saturdays are usually bad days to initiate contact with small businesses—that is perhaps their busiest day and they won't be too happy about spending time with you.

Second, when asking permission to place take-ones on their counter, subtly suggest on which counter you'd like to put them. Instead of just saying, "Would it be all right to put these brochures on one of your counters so your customers can find out more about our free services?"; say, "Would it be all right to put these brochures on that counter (point to the one nearest the cash register because that is where most of the traffic will be) so your customers can find out more about our free services?"

Third, when asking permission to place a poster in the store window, again subtly suggest in which window you'd like to place it. You want to place your posters in front windows as close to eye-level as possible.

Fourth, to increase your repertoire of promotional literature, you may want to design matchbooks for your organization. They are relatively inexpensive and you can distribute them just about anywhere cigarettes and cigars are sold (see p. 115 for TLE's matchbook design).

Finally, as with most everything you do, follow-up with proprietors is important. A telephone call or post card thanking them for their assistance will help to solidify your relationship with them. After all, you are going to want to visit them periodically to restock their supply of take-ones as well as put up new posters. The more conscientious you are with follow-up thank you's, the more receptive they will be to your future requests for their assistance.

PUBLIC TRANSPORTATION

Almost all commuter trains, subways, and buses have advertising space available for commercial enterprises. The advertising departments of most regional transit authorities also provide public service space for not-for-profit agencies at a reduced rate, e.g., in Chicago, TLE can place an 11" x 28" ad inside a minimum of 100 buses or elevated trains for only \$100/month. (Production costs for transit ads may, however, exceed the cost of obtaining the advertising space.)

Recently TLE placed public service ads on 200 elevated trains (see ad on p. 122). While no more than 100 new callers contacted TLE as a result of the effort, a number of current participants, media personnel, etc. did mention that they have seen the ads and were prompted to get in touch with TLE.

If you want to explore this approach, contact someone in the advertising department of your city's transit authority to determine how they might assist you in developing an effective transit advertising campaign.

WORD-OF-MOUTH ADVERTISING

As your organization receives increased visibility through mass media publicity and as you establish more localized publicity networks, a very encouraging development is likely to take place. People in your city will talk a lot more about your program to their friends and relatives. As a result, word-of-mouth advertising will attract an increasingly larger number of new callers to your program—this is the best and least expensive form of publicity for your organization. Moreover, you'll probably receive an increased number of requests from community groups, service organizations, and churches for guest speakers from your staff. Take advantage of these speaking engagements. They afford you the opportunity to inform more people about your program.

CONCLUSION

Without a huge budget for advertising, the communications task before you—making the people in your service area aware of the services you are providing—is by no means easy or simple. You should take full advantage of every available opportunity for free publicity. Put your own creative talents to work, and/or locate volunteer professional assistance, devising brief, impactful motivational messages which: 1) grab the attention of a somewhat apathetic populace which is already bombarded by more than a thousand other messages each day; 2) tell them what's in it for them; and 3) get them to become actively involved in your program. If you are successful in devising such a message and if you utilize a series of suitably developed publicity outlets, you are well on your way to operating an effective, useful and viable listing and referral service for the people in your community.

CHAPTER V

EXTERNAL FUND RAISING

INTRODUCTION

During the first year of operation TLE was run by an all-volunteer staff. The initial \$25 grant previously mentioned lasted for six months and pocket money from the staff carried the organization through the next six months. Little time was spent on fund raising mainly because TLE's volunteer staff was totally inexperienced in the field, in addition to being preoccupied with trying to find out whether or not TLE concept worked. After one year, all the indicators suggested that the concept did indeed have merit and that additional development was warranted. It was not until such a determination was made that TLE started to devote some serious attention to fund raising.

TLE discovered, with much dismay, that fund raising was a slow, arduous, and often frustrating process. But it had to be done in order to keep the organization alive.

GENERAL CONSIDERATIONS

Before developing a fund raising strategy, your organization will want to give some thought to two critical questions. First, should your organization be independent or a part of a larger, more established institution (library, community college, etc.)? Second, how do you want your organization supported after the first few years of operation—by clients, by a sponsoring institution, by the government, by a broad-based network of corporations and foundations, or by some combination of funding arrangements?

Your answer to the first question, quite obviously, will have far-reaching implications for your organization. If you become part of a larger institution, your job of fund raising will probably be easier since funders more readily invest their contribution dollars in established institutions instead of incipient organizations. To funders, the former represents stability, in that long-standing institutions have already established a proven track record; the latter represents high risk, in that statistics show that the failure rate for new organizations is quite high. Generally, funders will approach their contribution programs in a conservative manner—going with the surest and safest bet. However, along with the benefits of institutional absorption, you must also accept a loss of autonomy and independence and the risk of budget cuts.

Your answer to the second question will also have some profound implications for your organization. TLE is currently funded through a combination of

sources. Through the voluntary membership program (described in the next chapter), roughly two-thirds of TLE's operating budget is covered by clients. The other third is raised through grants and contributions from Chicago area foundations, corporations, and individual philanthropists. For special projects (e.g., computerization), TLE has obtained and will continue to look for funds from governmental agencies. You may want to likewise develop a diversified, broad-based means of support for your organization so that you can avoid the vulnerability of having only one funding source.

NEEDS ASSESSMENT

Before you can develop a self-supporting organization, you'll need some front-end funds to get your program off the ground during its initial years. The first step in developing an effective fund raising program is to determine how much money you need and for what purposes. To make such a determination, you will have to define your goals, outline a plan of action, and then estimate what it will cost to implement your program.

In order to calculate your costs, you'll have to make at least tentative (i.e., for fund raising purposes) decisions on such questions as: How many people do you want to serve? How many hours are you going to be open per week? How many staff members will you need to serve that many people and stay open that many hours? How much will you pay them? How many additional staff members will you need to do fund raising, publicity, administration, etc.? How much will those staff members get paid? What type of employee benefits (e.g., hospitalization insurance) do you want to provide and how much will they cost? What type of office location and environment (including furnishings) do you want? How much will that cost you? How many telephones might you need to handle calls? What type of configuration (one-line phones, 6-button phones, "Call Director," etc.) do you want? What type of service (units, etc.) do you want? And how much will all that cost? How much might you need for supplies? What type of office equipment do you want and how much will that cost? What kind of information system will you use to provide your service—manual, semi-computerized ("remote batch"), fully computerized ("on-line"), etc.—and how much will that system cost to operate, based on your usage projections? What type of brochures, catalogs, newsletters, posters, take-ones, slide shows, etc. do you want? How much will it cost to produce them? (i.e., writing, design, photography, artwork, layout, typesetting, pasteup, etc.) Then, based on the number of people you want to serve, and the activities you plan to reach them, how many of each item (brochure, catalog, etc.) will you want to print, and how much will that printing cost you? (Don't forget "little" things like solicitation letters, envelopes, business reply envelopes, stationery, etc.) Again, based on your planned activities, what amount of postage will you put on what items and how much might that all cost you? How much travel will your planned activities require, by what mode of transportation, and how much might that cost?

Then, based on your decisions on those questions, prepare an itemized budget for the total program. Following the order of the questions in the preceding paragraph, items on such a budget might include: part-time staff members,

full-time staff members, employee benefits, rent, telephones, office supplies, office equipment, system costs (equipment and printing for computerized or manual system), production costs, printing, postage, transportation, and insurance (Workmen's Compensation, liability, fire, theft, etc.). In essence, your itemized budget will become your fund raising shopping list.

DATA COLLECTION

After you have outlined your goals, plans, and projected costs, it is then time to identify your potential funding sources. As you will note below, in many respects, the strategies and techniques for developing media publicity networks also apply for raising funds. Just as it was recommended that you find out what kinds of organizations and programs interest your potential media contacts, the same is true with your potential funding sources. Generally, the more specifics you know about your funding sources, the better are your chances of receiving their support.

TLE has had experiences with four basic types of funders: 1) foundations, 2) corporations, 3) individual philanthropists, and 4) governmental agencies. The paragraphs below will provide you with some guidelines in your data collection efforts.

Foundations If you intend to engage in foundation fund raising, you should write to the following organization and request information about the publications and services it offers:

The Foundation Center
888 Seventh Avenue
New York, New York 10019

The Foundation Center is an independent, not-for-profit organization dedicated to gathering, analyzing, and disseminating factual information on philanthropic foundations. The Foundation Center operates two libraries (New York and Washington, D.C.), each of which has an extensive collection of fund raising publications as well as a full collection of the information returns which private foundations must file each year with the Internal Revenue Service. There are also 55 "cooperating collections" at public, academic, and foundation libraries in 43 states, Puerto Rico, and Mexico. These cooperating collections generally have returns on file for their area only. You can obtain a current list of locations by writing to the New York office.

A number of cities and states have formed associations of foundations in order to provide grant-seekers with additional information about funding sources in their area. Some associations are more organized and helpful than others. To determine whether or not your city or state has such an association, you can write to:

The National Council on Foundations
888 Seventh Avenue
New York, New York 10019

There are a variety of publications you should become familiar with as you plan your fund raising strategies. Below is a partial list that has been compiled by Lesley Stern, in a paper entitled, "A Basic Guide to Information on Foundations and Other Nonprofit Funding Sources."

Books

*About Foundations: How to Find the Facts You Need to Get a Grant by Judith B. Margolin. 1975. 38 pp.

The step-by-step suggestions tell grant seekers where to start their search for information and how to research most effectively foundation funding sources. Identifies printed and microfiche sources of foundation data, illustrated with excerpts from the sources. Describes the materials available in The Foundation Center's national and regional collections and in many public libraries.

The Foundation Center, 888 Seventh Avenue, New York, New York, 10019. \$2.00 prepaid.

Annual Register of Grant Support 9th ed. 1975-76. x, 646 pp.

Detailed information on grant support for both organizations and individuals from government agencies, private foundations, corporations, labor unions and educational and professional associations.

Marquis Academic Media, 200 East Ohio Street, Chicago, Illinois 60611.
\$47.50.

* The Art of Winning Foundation Grants by Howard Hillman and Karin Abarbanel. 1975. 188 pp.

Describes how to obtain grants from foundations. Contents of various foundation reference tools are briefly annotated. Practical approaches used by grant seekers are discussed. The authors also present a sample proposal illustrating the principles of proposal writing.

Vanguard Press, 424 Madison Avenue, New York, New York 10017. \$6.95.

Cumulative List of Organizations Described in Section 170(c) of the Internal Revenue Code of 1954. Revised to October 31, 1975. Compiled by the Department of the Treasury. Internal Revenue Service. 903 pp.

Cumulative list of organizations (with city and state locations), contributions to which are deductible for income tax purposes. IRS employs a coding system, explained in the preface, to identify each organization listed by type and limitation on deductibility. Reissued annually; cumulative quarterly supplements.

For sale by the Superintendent of Documents, Government Printing Office, Washington, D.C. 20402. \$11.60 per subscription.

*Especially helpful to fund raisers

Encyclopedia of Associations. 9th ed. Volume 1: National Organizations of the United States. 1975. 1413 pp.

Provides detailed information concerning U.S. nonprofit organizations of national scope. In it can be found: location, phone number, principal officer, staff size, objectives, publications, etc. Best available source for information on grant-making organizations not actually classified as private foundations.

Gale Research Company, Book Tower, Detroit, Michigan 48226. \$55.

The Foundation Center Source Book. 1975-76. 2 volumes. Edited by Terry-Diane Beck and Alexis Gersumky. xi, 1034 pp.; xviii, 1360 pp.

Comprehensive, authoritative profiles of 227 national or regional grant-making foundations. Profiles include: recent fiscal data; all grants made in the year of record; statements of policies, programs, and application procedures.

Published by The Foundation Center and distributed by Columbia University Press, 136 South Broadway, Irvington, New York 10533. \$65 per volume.

*The Foundation Directory, Edition 5. Edited by Marianna O. Lewis. 1975. xxiii, 516 pp. Four semiannual supplements.

A guide to the larger United States foundations having assets of more than \$1 million or having made total contributions of \$500,000 or more in the year of record. Listings for each foundation include: Address, date and form of organization, donors, statement of purpose and description of activities including special limitations, names of officers and trustees, financial statistics for the year of record (1972 or later). Four indices provide ready access to: fields of interest, state and city locations, names of donors, administrators, and trustees; foundation names.

Published by The Foundation Center and distributed by Columbia University Press, 136 South Broadway, Irvington, New York 10533. \$30.

*The Foundation Grants Index, 1974. Edited by Lee Noe. 1975. xiii, 315 pp.

A cumulative listing of the grants of \$5,000 or more made by 262 major foundations, most of which appeared in the bimonthly journal, Foundation News. Three useful indices: list of domestic and foreign recipients, list of granting foundations with their locations, and key word subject index.

Published by The Foundation Center and distributed by Columbia University Press, 136 South Broadway, Irvington, New York 10533. \$15.

Grants: How to Find Out About Them and What to Do Next by Virginia P. White. 1975. xiv, 354 pp.

This book explains what the grant business is all about. Discusses

*Especially helpful to fund raisers

the basic sources of information on government, foundation, and corporate grants. Attention to the written proposal is also given. Plenum Press, 227 West 17th Street, New York, New York, 10011. \$19.50.

Users' Guide to Funding Resources by Human Resources Network. 1975. v, 231 p.

Contains articles describing the current state of fund-raising; information on gaining a tax-exemption; how to organize research, and the steps necessary to obtain funds. Profiles funding programs of foundations, corporations, nonprofit organizations, government agencies within the broad subject areas.

Chilton Book Company, Chilton Way, Radnor, Pennsylvania, 19089. \$42.00.

The Grants Register 1975-1977. Edited by Roland Turner. 1975. lxvi, 801 p.

Provides current information on more than a million individual award opportunities for graduates, young professionals, and others wishing to undertake studies, creative work, or training of an advanced nature. Especially designed for citizens/residents of the U.S., Canada, the United Kingdom, Ireland, Australia, New Zealand, South Africa, and the developing countries.

St. Martin's Press, 175 Fifth Avenue, New York, New York, 10010. \$19.50.

Periodicals

* Foundation News. Edited by Patrick W. Kennedy.

Bimonthly journal concentrating on activities of philanthropic organizations. Includes a grants index section of recent grants awarded by private foundations. A typical bimonthly section lists more than 1,600 grant awards totaling about \$100 million and contains recipient and key word indices.

Published by the Council on Foundations, Inc., 888 Seventh Avenue, New York, New York, 10019. Subscription rate: \$20 per year.

* The Grantsmanship Center News.

This periodical features articles providing information and guidance for those seeking grants from both government and private sources.

Published by The Grantsmanship Center, 1015 West Olympic Boulevard, Los Angeles, California, 90015. Subscription rate: \$15 per year.

Many of these publications should be available in your city's central public library, in the library of a large university near you, or at larger associations of foundations.

*Especially helpful to fund raisers

Corporations Most corporations have a contributions program for not-for-profit organizations. Unfortunately, there is no single publication available which contains pertinent fund raising information about corporations (at least not in Chicago). Perhaps the best approach to corporations would be to contact your Chamber of Commerce and request a list of the larger corporations in your city. Then telephone each corporation and ask the receptionist, "Does _____ corporation have a contributions program for not-for-profit organizations?" More than likely the answer will be "yes." The receptionist will probably connect you with a secretary in either the Department of Community Affairs, Public Relations Department, or the President's office. Ask the secretary three questions: 1) Who is in charge of your contributions program? 2) Does _____ corporation have a printed set of contribution guidelines available? and 3) Does _____ corporation have an annual report indicating which not-for-profit organizations received financial support from your corporation last year? Make a note of the name, title, and department of the person in charge (you don't want to talk to this person yet—just find out who he/she is). If the corporation has printed materials relevant to your second and third questions, request copies of them. These materials will aid you in formulating your solicitation approach later on.

Individual Philanthropists Again, there is no single printed source available that outlines the giving policies of wealthy individuals. Usually, through word-of-mouth you can find out who in your community has a reputation for his/her philanthropic generosity. Also, as you are reading your daily newspaper, be on the lookout for articles about influential people who could be likely candidates for your organization's solicitation program. Finally, you may want to thumb through a Who's Who publication for additional leads. Depending on where you live, you'll want to consult one of the following: Who's Who in the East, Who's Who in the Midwest, Who's Who in the South and Southwest, and Who's Who in the West. Most public libraries should have a copy of the publications appropriate for your region.

Governmental Agencies In Chicago, TLE has not been able to find a publication that lists the financial assistance programs available through the city or county governments. The same may or may not be true in your area. However, you'll probably want to establish contact with your local alderman, state representative, and mayor to inform them of the work you are doing. At the same time, obtain information about your city's federal revenue sharing program as well as your local CETA (Comprehensive Employment Training Act) program. The DeKalb Exchange has been partially funded by federal revenue sharing and a number of listing and referral services have one or more of their staff members' salaries covered either fully or partially by CETA funds.

On the state level, you'll probably find that your state government publishes a booklet which lists most of the technical and financial assistance programs available to individuals, organizations, and agencies in your state. In Illinois, the publication is called the Guide to Illinois State Services. Your local library or state office should be able to help you locate the publication for your state.

For information about financial assistance programs on the federal level, you should refer to two basic sources: the Federal Catalog of Domestic Assistance and the Federal Register. Again, you will probably be able to find copies of these documents in your central public library or in the federal office located in your city. To date, TLE has received major federal funding from only one source, FIPSE. If you want to send for a copy of FIPSE's guidelines, the address is:

Fund for the Improvement of Postsecondary Education
Department of Health, Education, and Welfare
400 Maryland Avenue SW
Washington, D.C. 20202

Finally, another good source for up-to-date information about potential governmental funding sources is the Bulletin, a monthly publication of the National Center for Educational Brokering which is a non-profit educational organization designed to promote educational brokering through technical assistance, publications, and policy studies and recommendations. For subscription information write to:

James Heffernan, Editor
BULLETIN
National Center for Educational Brokering
405 Oak Street
Syracuse, New York 13203

INTRODUCTORY LETTER

After you have collected a substantial amount of data on the potential funding sources available to your organization, prioritize those sources on the basis of which are most likely to be interested in your program. Take into consideration not only the printed data you have collected, but also any gut-level feelings you have developed while collecting the data. Map out a schedule and a plan of action to follow.

Compose an impactful introductory letter to capture the interest of your prospective funder. The letter should describe your program and its potential or proven effect on your community. As with your introductory letters to media contacts, be sure to get the reader's attention with your first sentence, send along supplementary printed materials describing your program, and indicate that you will make contact on a specific date (see p. 123 for a sample introductory letter for fund raising — also reread the Introductory Letter section on p. 26).

INITIAL PHONE CALL

The more involved you become in fund raising, the more you'll begin to realize that most funders (especially corporations and individual philanthropists) give contributions to "people" and not to "programs." In other words, funding decisions are made not only on the merit of your program but also on the funder's impressions of your organization's

representative who does the asking. You might have the most effective educational program in your city, but if your potential funders do not like, or have misgivings about, the person who makes the grant request, your chances of obtaining a contribution are vastly diminished.

Your initial phone conversation will give you the opportunity to start "impressing" your potential contributors. The major goal in the phone conversation is not to ask for money (that comes later), but rather to arrange a face-to-face meeting between you and your potential donor. You might want to start your phone conversation like this: "Hello, Mr./Ms. (etc.) _____. I'm _____ from _____ and about a week ago I sent you some information describing our new approach to education. I was wondering if you've had a chance to look at it, or if you have any questions about our program." From that point on, just play it by ear, keeping in mind that you want to interest your listener so much that when you indicate that you'd like to stop by his/her office to explain some of your organization's future plans, an invitation will be granted to you.

In the event that you are not able to talk with the person to whom you sent your introductory letter (most of the time you'll find the person is either "out of the office" or "in a meeting"), leave your name, organizational affiliation, and phone number with the secretary and ask that your call be returned. If your call isn't returned in a week, take the initiative and place your call again. Continue the same process until you reach your potential donor.

The above process is appropriate unless, of course, the secretary or an administrative assistant begins asking you why you are calling. Tell them. Don't do anything that might alienate a secretary or administrative assistant. They are the channel through which your materials reach the decision-makers. If you alienate them, your materials might get channeled directly into the wastebasket.

Finally, your initial phone conversation is an ideal opportunity for you to collect additional data. During the conversation you should be taking copious notes. You want to jot down your impressions of what your potential donors liked and disliked about your program. In future correspondence and interactions you'll want to capitalize on their "likes" and, in some way, assuage their "dislikes."

FACE-TO-FACE MEETING

Keeping in mind that funders generally fund "people" and not "programs," your major goal for the face-to-face meetings is to further impress your prospective donors. Strive to establish a comfortable rapport with them. Present yourself as a dynamic representative of a dynamic organization. Convey reliability, confidence, perseverance, professionalism, and commitment to the program in all your interactions.

In terms of the actual presentation, TLE customarily uses the following format as a guideline:

1. Introduce yourself.
2. Provide copies of newspaper or magazine articles about TLE for prospective donors to read while you are setting up the color slide show. (Laminate the articles in plastic for a more professional appearance.)
3. Present slide show describing TLE.
4. Ask for questions.
5. Outline plans for the immediate future.
6. Indicate the projected cost of implementing the plans.
7. Ask the prospective donor if there are any aspects of TLE that his/her foundation or corporation may be interested in.
8. Collect data regarding guidelines for proposals, best time to submit proposals, average amount of the prospective donor's contribution to not-for-profit organizations, deadline dates, and what facet of TLE's program is of greatest interest to the prospective funder.
9. Invite prospective donor to TLE for a site visit (the more time they invest in finding out about your program, the greater the likelihood that they're going to fund you).

Whenever possible, you should try to have one of your more influential board members attend the meeting with you. Such a practice adds more legitimacy to both your presentation and your organization. In some cases it would be appropriate for one of your board members "to do the asking" (i.e., for financial assistance), especially if he/she is a peer or personal friend of the prospective funder.

PREPARATION OF GRANT REQUEST

Before preparing your proposal, write to The Foundation Center and request copies of the following two pamphlets: "What Makes a Good Proposal?" by Lee and Barbara Jacquette; and "What Will a Foundation Look for When You Submit a Grant Proposal?" by Robert Mayer. Both of these publications will provide you with some insights on how to formulate a grant request.

When TLE prepares a grant request, there are usually three parts to it: 1) the proposal, 2) a cover letter, and 3) supporting materials.

The Proposal Written proposals should be short and clear—3-5 pages, except when the funding agency indicates that a more extensive proposal is preferred. Describe your organization, outline its objectives, and concisely define the problem you're addressing (couched in the language of the funding agency). Then outline your plan of action—the solution to the problem. Indicate what will be done, when, where, how, and by whom. Develop a reasonable evaluation scheme. Include an itemized budget. Ask for an amount you are likely to receive (based on your research of the respective funding sources). And finally, provide some idea as to where you have obtained or will obtain the rest of your budget. (See pp. 125-136 for sample proposals)

The Cover Letter For the most part the cover letter should be an abstract of your proposal. Be sure to mention why your prospective funder should be interested in your program (based on the data you collected). Specify in the letter the exact amount you are requesting. Indicate that you would welcome the opportunity to talk with them if they have any questions about the proposal. Mention that you hope to hear from them in the affirmative so they can play an active role in the accomplishment of your mutual goals. (See pp. 124 & 129 for sample cover letters)

The Supporting Materials Along with your proposal, send the best two or three newspaper articles you have that describe your program and enhance your legitimacy. Be sure to attach a copy of the confirmation letter from IRS that verifies your tax-exempt status. You'll also want to include a copy of your latest catalog and/or newsletter. Most importantly, your prospective funders should receive individual letters of support from approximately a half-dozen key members of your Board of Directors and/or Advisory Board (this practice, however, may not be appropriate for federal funding agencies). Letters of support give you the opportunity to underscore key elements of your proposal and program. Ideally, you should have Board members in the following areas send a letter of support in your behalf: radio, television, newspaper, corporation, institutions such as schools or universities, and large, well-known community organizations. The letters of support should not be on your organization's stationery but rather on the letterheads of the organizations with which your Board members are affiliated. These letters should be sent in a staggered fashion 2-12 days after the submission of your grant request. (See pp. 137-139 for sample support letters)

FOLLOW-UP

While each of the preceding fund raising steps is important, perhaps the most important for you will be the follow-up. After any meeting with a prospective funder, make it a common practice to write a short letter thanking the funder for his/her time and interest in your program. Such a practice is certainly costly and time-consuming, but the long-term payoff for you and your organization should make it quite worthwhile. A week or two after submitting your proposal, telephone your potential

donor to make sure the proposal was received and that everything is in order. Indicate on the phone that if they have any questions to be sure to get in touch with you.

From that point, the matter is essentially out of your hands. Your request will either be granted or declined. If granted, write a "thank you" letter for their assistance. If declined, write a "thank you" letter for their consideration. In both cases, indicate that you'll keep them informed of your progress as your primary objective is to solidify relationships with your funders and decliners (remember, the latter are still potential funders). Let both groups know how your program is progressing—whenever new catalogs or newsletters are published, send them copies—whenever an interview with you is definitely scheduled to be aired on a radio or television program, send them a post card beforehand to let them know about it—whenever a newspaper or magazine article is printed about your organization, be sure to send them copies. Many funders get the impression that the only time they hear from not-for-profit organizations is when they need money. If you want to have an effective fund raising program, don't let your funders get such an impression about your organization.

CONCLUSION

In many respects, fund raising is a tricky business. Even if you conscientiously follow the procedures outlined above, about 50% of the decisions regarding whether or not you get what you ask for hinge on a set of circumstances over which you have no control. According to Denis Detzel, who has directed contributions programs for both CNA Financial and McDonald's Corporations, some of these non-controllables include: the economic climate of the country, the profits of the corporation, the stock market, the volume of grant requests the funder receives, the weather, what the funder had for breakfast on the morning of the decision, and problems/triumphs in the funder's personal life!

Virtually all funding sources receive requests for contributions far in excess of their capability to respond favorably. Without a doubt, the competition is keen. In its six-year history, TLE has solicited over 200 funding sources, 30 of which have become supporters. TLE did not, of course, employ all of the methods and techniques outlined in this chapter throughout those six years; some of them were learned just recently through a lengthy process of "trial and error." If those methods and techniques had been utilized all along, chances are good that TLE could have at least doubled its success rate in pursuing the philanthropic dollar. It is hoped that the information contained in this chapter is helpful to you and that your efforts will be more productive and rewarding.

CHAPTER VI

INTERNAL FUND RAISING

INTRODUCTION

Most governmental and philanthropic funders do not want your organization to become perennially dependent on their financial support. They may be inclined to help you get started, but after an initial period of assistance you have to find ways to keep your program going on its own. Your clients, the people who directly benefit from your efforts, are the people to whom you should turn. If they like what you do for them, then they should be willing to assume the responsibility for keeping your service available to the public.

There are a variety of ways that you might raise money from your clients—ask for contributions, charge a mandatory registration fee, establish a voluntary membership program, charge a set fee for each time a client uses the service, charge a fee for each subject registered, charge teachers a percentage of their teaching fee, or create some other arrangement that might make sense for your operation.

Rightly or wrongly, TLE decided from the start not to charge any type of fee for the service. There were three reasons for this decision. First, to charge a service fee would have created a massive accounting/billing problem. Second, the founders of TLE were ideologically committed to keeping the listing and referral services free to anyone who needed them. And third, TLE was concerned about losing some of the free publicity it was receiving from Chicago area radio and television stations.

For the first three years, TLE tried to raise funds by requesting contributions from clients. In virtually all correspondence with clients, a rather amateur and disorganized request was made for donations. For example, buried at the end of "The Learning Exchange Newsletter — February - March 1972" (which was a free 2-page mimeographed publication), appeared the following: "\$\$\$\$\$\$\$\$\$\$\$\$\$ Soon, very soon, the Exchange may be forced to start picking up its own printing bills. As you may know, the Exchange does not have and has never had \$. If you have any ideas on how to get \$ or if you have any to give, toss it our way. If you have postage stamps, we could use those too." Such an approach didn't work. TLE never raised more than 17% of what was then a very modest operating budget in this manner.

After a long period of brainstorming, researching different kinds of self-support programs, and consulting with direct-mail experts, TLE decided to establish a voluntary membership program as its principal

means of support.

TLE MEMBERSHIP PROGRAM

The voluntary membership program developed by TLE is, in many respects, patterned after the solicitation programs employed by most PBS television stations. TLE offers its listing and referral services free of charge to anyone who is registered with the organization; and as was indicated earlier, to register is simply a matter of filling out and returning the membership/registration application form that is mailed after the client's initial phone call to TLE.

TLE encourages clients to become voluntary supporting members by offering them extra benefits besides the basic listing and referral services which are free to everyone who returns a membership/registration application form. These additional benefits include: 1) a copy of TLE Catalog listing the thousands of subjects that participants want to teach, learn, or discuss; 2) a one-year subscription to TLE News — a quarterly newsletter which contains interesting and thought-provoking articles describing what people are doing through the service, a "Catalog Update" section which updates the subject listings in the Catalog and a "Members' Bulletin Board" that members can use free of charge to inform thousands of fellow members of their needs, offerings, and interests; 3) a special members' private phone number which members can call when TLE's public lines are busy, and 4) a TLE membership card with the members' private phone number printed on it.

TLE has two levels of membership—a Regular Membership at \$15 per year and a Limited-Income Membership at \$7.50 per year. The Limited-Income Membership is available to senior citizens and other persons who wish to help support TLE by becoming members but who cannot afford the Regular Membership. Members at both levels receive the same benefits outlined above. Since the inception of the voluntary membership program in May, 1974, the ratio of Regular Members to Limited-Income Members has held fairly steady at 4:1, resulting in an average contribution of approximately \$13.00 per member.

TLE also has two- and three-year memberships available at \$25 and \$30 respectively. Less than 2% of the supporting members opt for either of these choices. In the final analysis, TLE might be losing money by offering these multi-year memberships. The people who give \$25 or \$30 may do so not so much because they want to receive the membership benefits at a reduced rate over a longer period of time, but rather because they like the idea of TLE and want to make a contribution to the program in addition to their supporting membership. If that is the case, TLE misses the opportunity of soliciting philanthropic clients on a year-to-year basis, because it would not be in good taste to ask two- or three-year members for another contribution until their memberships are about to expire. Perhaps a better way to structure the membership program would be to eliminate the two- and three-year options and add two new levels of membership, e.g., besides the Limited-Income (\$7.50)

and Regular (\$15) Memberships, a Special Membership at \$25 per year and a Sponsorship at \$50 per year could be instituted.

It is an encouraging fact that, currently, more than half of the New Callers who return the membership/registration form become members, even though they can use the service free of charge as a verified registrant. However, just over half of all New Callers return the membership/registration form at all. During the coming years, TLE will search for ways to increase the percentage of New Callers who return the form, either as members or as verified registrants.

MOTIVATING NEW CALLERS TO BECOME MEMBERS

TLE has found that most of the revenue generated by the membership program comes from New Callers. To motivate New Callers to become members, TLE has developed a three-stage approach for increasing the likelihood of their deciding to support the program: 1) the initial phone conversation, 2) mailing printed solicitation materials, and 3) a follow-up solicitation mailing two weeks after the first mailing.

Initial Phone Conversation When New Callers first contact TLE they usually want to know how the service works and how they can use it (see pp. 73-78 for the telephone resource counselor's verbal description of the service). Please note that the initial phone conversation indicates not only how the program is financed and how client support is needed, but also that people who opt for a membership receive a few extra benefits for their financial contribution to TLE. In the business community the initial phone conversation might be considered a "soft sell." It lays the groundwork for a more direct solicitation pitch that will come later.

Printed Solicitation Materials While the objective of the initial phone conversation is to get New Callers more interested in TLE, the primary objective of the printed solicitation materials is to get them to act, i.e., become either a member or a registrant. The packet of printed materials (currently used by TLE but which will be changed soon) consists of five parts: 1) a solicitation letter from the Executive Director, 2) a brochure, 3) a membership/registration application form, 4) a business reply ("postage paid") envelope, hereafter referred to as a "BRE," and 5) a legal-size #10 envelope in which materials are sent.

The letter from the Executive Director (see pp. 79-80) is designed to reinforce the information provided in the initial phone conversation by thanking New Callers for their interest in the program, defining the service in their terms ("you" is perhaps the most important word throughout the letter), conveying the scope of the program in regard to the variety of subjects listed and the number of people participating, underscoring the need for support, outlining benefits

available to supporters, and prodding them to act by filling out the membership/registration application form.

The brochure (see pp. 81-84) is designed to reinforce and complement the information in the solicitation letter. The brochure should be eye-catching, expressive, simple, and again, reflect the kinds of subjects and activities that attract people to listing and referral services.

The membership/registration application form (see p. 85) is the New Callers' action instrument. It is their passport for using the services of TLE. It also provides one more opportunity to "sell" the membership program. Please note that the membership benefits are listed on all three printed items—the letter, the brochure, and the membership/registration application form. In order to encourage more people to become supporting members, you will also note that the free registration option is somewhat de-emphasized on the card by having it in smaller print. The stark reality is that if too many people become registrants and not members, TLE will be forced to go out of existence.

The BRE (see p. 86) is included in the information packet to make it easier for New Callers to become members. Studies in direct mail advertising indicate that the easier you make it for people, the more likely they are to respond. The size of the BRE is #9, large enough to accommodate the membership/registration application form along with a check and small enough to fit into the #10 information packet envelope (see p. 87 for sample #10 envelope).

The sequence in which you place your materials in the #10 envelope is important. You want to lead your readers through the materials in a logical manner after they open the envelope — first comes the letter, followed by the brochure, membership/registration application form and then the BRE. (Important note: Before printing your materials, be sure to weigh the component parts of your solicitation packet. TLE packet weighs .98 ounces — if it weighed .02 more ounces, the postage costs would nearly double. You can adjust the weight of your materials by choosing different weights of paper.)

Follow-Up Mailing Recently TLE began sending a second mailing to all New Callers who did not respond to the solicitation materials within two weeks of their first phone call to TLE. The follow-up solicitation packet used by TLE is identical to the first. The second mailing serves as a reminder that TLE is still interested in having them participate in the program and it nudges them, once again, to become members. While this relatively new technique has not yet been thoroughly tested, the preliminary results seem to indicate that the time and cost involved in the second mailing are far outweighed by the additional income it generates for TLE.

ADDITIONAL FUND RAISING STRATEGIES

Aside from the Regular and Limited-Income Memberships described above, TLE has had some experience with other forms of internal fund raising—gift memberships, sale of promotional items, honorariums for speeches, out-of-town memberships, as well as the institutional memberships described in Chapter IV.

Gift Memberships The gift membership program was instituted recently to enable members and registrants to acquaint their friends and relatives with the services of TLE and also to raise additional funds for the organization. The materials used for the gift membership program can be found on pp. 140-144. As you will note from these materials, for the 1976 Christmas season, TLE coupled the gift membership program with the sale of TLE promotional items. Due to design and printing delays, the materials were mailed too close to Christmas and Chanukah. The success of the project was probably severely hampered by a late mailing date. In 1977, TLE will be mailing the gift membership materials much earlier in order to give the fund raising potential of gift memberships a true test.

Sale of Promotional Items TLE has designed and produced three promotional items — T-shirts, tote bags, and TLE watches (see pp. 144-146). In spite of a fairly extensive advertising campaign, none of these items made much money for TLE. The development costs in terms of staff time and materials far outweighed the revenue generated by sales. However, such items do have an immeasurable value in terms of participant identification with the organization and word-of-mouth publicity.

Honorariums for Speeches Frequently, churches, service agencies, and community groups invite TLE staff members to give talks to their constituents. At the present time, TLE does not have a set fee for guest speakers, but in many cases the sponsoring agencies are willing to provide an honorarium for the speaker. When making speaking arrangements for your organization, be sure to find out if an honorarium is available. TLE has a policy that any funds received by the speaker go directly into TLE's bank account instead of to the staff member who gives the talk.

Out-of-Town Memberships TLE has found that quite a few people around the country are interested in keeping abreast with the growth and development of TLE. An Associate Membership program was therefore instituted for out-of-towners. Associate members receive many of the same benefits given to Regular and Limited-Income Members plus a copy of Greg Squire's booklet entitled "The Learning Exchange: An Alternative in Adult Education." At present, TLE has more than 100 Associate Members across the United States and abroad.

CONCLUSION

During the past three years, TLE has come a long way in establishing a viable self-support mechanism. Quite a few effective methods and techniques have been developed. TLE has also dabbled with quite a few that have little or no merit. In the coming years, not only will TLE be focusing on ways to improve the many facets of the internal fund raising program, but it will also be learning from other listing and referral services as they attempt to find additional ways to raise funds for their organizations. Hopefully, as more listing and referral services experiment with different types of internal fund raising approaches, an extensive body of knowledge will eventually emerge. With this body of knowledge, people developing such programs should be able to make sensible, cost-effective decisions regarding the design and implementation of their organization's self-support programs.

CHAPTER VII

MANAGEMENT

INTRODUCTION

As you have probably deduced by now, establishing and maintaining a listing and referral service is by no means a simple task. The systems and subsystems needed to operate a successful program are numerous and, in some cases, quite complex. Managing these complex systems is perhaps the major challenge confronting most of the listing and referral services currently in operation as well as the ones that will inevitably be developed in the future. In order to create a successful program, it is imperative that you find a sensible, cost-effective, and humane way to orchestrate the people, resources, and activities of your organization. More importantly, you'll have to devise a management system which will enable the organization to continue functioning in the event that one or more key people in your program leave the organization temporarily or permanently.

It appears that one of the main reasons why so many listing and referral services have failed is because they frequently become too dependent on the efforts, ideas, and energy of too few people. When these people decide to move on, the organizations tend to fall apart because not enough attention was given to the development of ongoing, effective management systems. This chapter will describe the management system currently employed by TLE and also provide some ideas about how and why it was developed.

ADMINISTRATIVE STRUCTURE

During its first year, TLE had no formal management structure. A group of 8-20 volunteer "co-directors" would meet weekly to make out the volunteer schedule for answering TLE's phones, discuss organizational problems, devise appropriate solutions, and assign tasks on the basis of organizational needs and available resources/personnel. The leadership for the organization in this early developmental stage informally rested on Denis Detzel and Bob Lewis who were able to devote approximately twenty hours per week to the project as part of their doctoral studies at Northwestern University. Their major interest in the program was to determine whether or not a people-to-people learning model could work in a large metropolitan area.

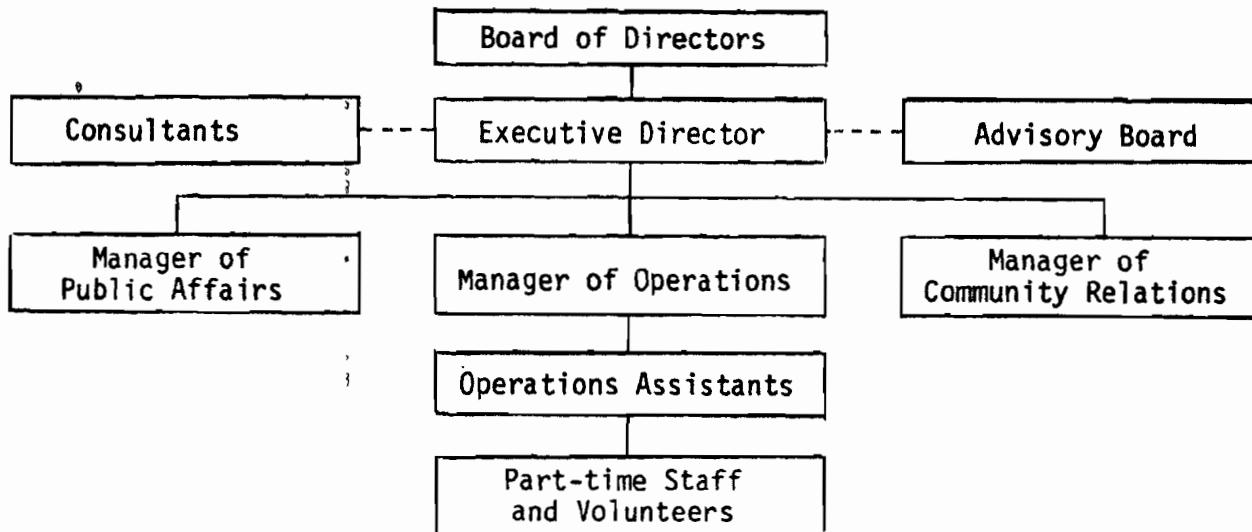
In the summer of 1972, TLE obtained a research grant from the Quaker Oats Company to assess the program's effectiveness. After the study substantiated that many of TLE's clients were having their teaching/learning/sharing needs met through the service, additional funds were raised, publicity efforts were increased, and the hours of operation

were expanded from four hours to twelve hours per day in order to enable more people to contact TLE. (Essentially, TLE was moving in the direction of becoming a service designed to meet the needs of the people who used it, not just the people who ran it.)

For the next two years, TLE staff members continued to operate without a clear and effective management structure. But as new programs were developed, as more people began using the service, as staff size increased, as the internal systems became more complex, and as more critical decisions had to be made, it became rather obvious that TLE was backing itself into a corner. The entire management situation had to be carefully analyzed and then revised so that the success of the overall program was not jeopardized.

So, in mid-1975, TLE addressed its management problem head-on and developed a somewhat conventional management model similar to that found in most successful businesses and service agencies.

Following is the current organizational chart and a description of the responsibilities for each position.



Board of Directors The Board of Directors is legally responsible for the financial and operational policies of TLE. Members of the Board meet quarterly to discuss major expenditures, policy changes, financial and operations reports, and special project fund raising proposals. With the exception of the Executive Director, who is also a staff member, the Board of Directors receives no compensation from TLE for services rendered.

When forming your Board, you should attempt to select not only people who have demonstrated a strong interest and commitment to your program, but also people who have the proper "connections" which are so critically important in obtaining funds and other resources such as publicity. Generally, the more influential your Board is, the more legitimate your organization will be perceived in the eyes of funders, media personnel, business contacts, and the public.

Executive Director The Executive Director is the appointed operational agent of the Board of Directors. As such, he/she is ultimately responsible for the formulation and execution of all organizational plans, contracts, programs, as well as whatever decision-making is involved in the conduct of TLE affairs.

In carrying out his/her responsibilities, the Executive Director strives to delegate authority as much as possible. Just as the Board of Directors has entrusted the running of the organization to the Executive Director, so too does the Executive Director entrust various components of the operation to appropriate staff members of TLE. In this manner, every staff person is responsible for a piece of the organization—from the part-time telephone resource counselors who deal directly with clients to the managers who are responsible for major portions of the overall program. The Executive Director then makes sure all of the various pieces fit together so that the organization accomplishes its objectives effectively and efficiently. While the Executive Director only meets with the Board of Directors on a quarterly basis to report on the progress of the organization, he/she usually seeks ad hoc consultation from various board members as needed.

In selecting an Executive Director for your organization, it is important to choose someone who has not only administrative competence, creativity, and dedication to your program, but who also has the ability to delegate authority and welcome valuable input from staff members, Board members, and clients in the design and implementation of all the various activities involved in your program. Moreover, your Executive Director should be personable, attractive, articulate, and possess other qualities necessary to serve as a good representative of your organization when dealing with the media, funders, etc.

Your choice in selecting an Executive Director will probably be one of your organization's more important decisions—the selection you make has the potential of making or breaking your operation.

Outside Consultants Occasionally TLE employs the services of outside consultants to assist in the development and implementation of highly specialized programs and activities. Some of the areas in which TLE utilizes outside consultation include: computerization, editing services, advertising, development, and legal matters. The Executive Director is responsible for the formulation of all contracts with outside consultants.

Advisory Board The Advisory Board has no legal responsibility for the policies and activities of TLE. Members of the Advisory Board do, however,

assist the Executive Director and other staff members in the design and implementation of plans and activities of TLE. In many respects, the Advisory Board is a "working board," i.e., the members of the board provide TLE with a specific type of technical assistance that is important to the success of the overall program.

A glance at TLE's stationery will clearly demonstrate that approximately half of the Advisory Board are people affiliated with Chicago area media. Since radio, television, and newspapers provide an essential communication link between TLE and the general public, the media people on the Advisory Board were selected to play an active role in helping to publicize TLE. In forming your Advisory Board, you will probably want to select media people from your city who can do the same for your organization. You will also want to add people to your Advisory Board who have demonstrated expertise in advertising, graphic design, computerization, development, direct-mail solicitation, legal counsel, management, market research, and community service through established institutions. A well-rounded working board will aid you immensely in developing your program.

Manager of Operations The Manager of Operations is a full-time staff member directly under the supervision of the Executive Director. He/she is responsible for implementing and evaluating all the internal systems and procedures necessary for serving TLE clients. He/she is also responsible for assisting in the design, implementation, and evaluation of any new systems and procedures developed to improve the service. The Manager of Operations (with the help of Operations Assistants and part-time staff) is responsible for the nine major internal functions described below:

1. Administration of Part-Time Staff - hiring, training, scheduling, and supervising part-time personnel.
2. Filing Systems - maintaining, monitoring, and updating all T, L, I, Feedback, and Master Card Files, including daily checking of newly-filled-out T, L, I, and Feedback cards. (At present, TLE files are being converted to microfiche via computer — the Manager of Operations is learning the overall design of this system and is responsible for its maintenance and updating.)
3. Feedback System - gathering and analyzing information obtained from TLE clients about the effectiveness of referrals.
4. Research and Statistics - producing reports from available data about demographics, effectiveness of publicity, and other variables concerning the use and support of TLE.
5. Resource Collection - seeking out new resources (teacher and interest-matches) when there are special unmet needs/interests in a subject/geographic area.
6. Mailings - supervising and scheduling of daily, weekly, monthly, and quarterly mailings. (The Manager of Operations must be

familiar with the postal regulations applying to TLE's mailings.)

7. Processing Members and Registrants - maintaining contributions/status records for participants and sending appropriate materials to new members and registrants.
8. Bookkeeping - processing daily receipts and deposits, preparing payroll, paying bills, submitting requisitions to organizations or agencies which have extended grants, and preparing materials and data for TLE's bookkeeping service.
9. Office Maintenance, Inventory, and Purchasing - maintaining a neat, clean, presentable office and making timely purchases of printed materials and supplies on a comparative basis.

Manager of Public Affairs The Manager of Public Affairs is a full-time staff member directly under the supervision of the Executive Director. He/she is responsible for TLE's media and corporate relations. To carry out his/her responsibilities, TLE's Manager of Public Affairs establishes and maintains contact with appropriate personnel in radio, television, and print media; writes and submits copy for P.S.A.'s and other public service advertising; compiles and distributes PEOPLEPHILE on a regular basis; writes and submits press releases about significant TLE events or activities; establishes and maintains contact with appropriate personnel in the business community regarding the corporate membership program. and serves as the primary guest lecturer for TLE.

Manager of Community Relations The Manager of Community Relations is a full-time staff member directly under the supervision of the Executive Director. He/she is responsible for the Library Membership Program. To carry out his/her responsibilities, the Manager of Community Relations establishes and maintains contact with library staff members participating in the Library Membership Program; encourages head librarians of non-participating libraries to become involved in the program; develops methods and techniques for the improvement and expansion of the Library Membership Program; and designs, produces, and tests promotional materials for distribution through the member libraries.

Operations Assistants The Operations Assistants are part-time staff members under the direct supervision of the Manager of Operations. TLE's Operations Assistants are responsible for overseeing operations whenever the Manager of Operations is not present (evenings, weekends, etc.). Operations Assistants also help the Manager of Operations supervise part-time staff in the various activities outlined in the Manager of Operations section.

Part-Time Staff The part-time staff members are under the supervision of the Manager of Operations and Operations Assistants. In addition to assisting the Manager of Operations in the tasks previously outlined, part-time staff members also provide support services to the Executive Director and other full-time staff members. Part-time staff members are

usually hired to work between 15-20 hours per week (see pp. 147-148 for a sample application form).

At the time of this writing, TLE has two Operations Assistants and thirteen part-time staff members. A large part-time staff not only enables TLE to serve its clients well, but also provides the Executive Director with a ready resource pool of persons familiar with the workings of the organization who can move into full-time positions as new programs are developed or as staff members leave the organization.

As new programs are developed and as new employees are hired, TLE's organizational chart will be altered and new job descriptions will be formulated in order to meet the needs of a growing and expanding listing and referral service.

STAFF MEETINGS

Twice a month at a regularly scheduled time, TLE's full-time staff has reporting/planning/problem-solving meetings. These staff meetings are convened by the Executive Director and they are the primary means by which individual staff members stay abreast with the diverse activities taking place in all areas of TLE.

Prior to the meetings, each staff member (including the Executive Director) is required to prepare two brief reports. The first report outlines the major highlights of work accomplished since the preceding staff meeting. The second report outlines the work to be accomplished before the next staff meeting (see a sample staff meeting report prepared by the Executive Director on pp. 149-151). In the twice-monthly meetings, each staff member verbally presents his/her reports. Staff members establish reasonable deadlines for all tasks to be accomplished; and in their reports to the group, they indicate the progress made toward the accomplishment of each major task. If a staff member is having a difficult problem in accomplishing a given task, the staff meetings afford him/her an opportunity to present the problem to the group and then obtain feedback and suggestions from other staff members.

When major operational decisions have to be made, all staff members are usually involved in the discussion concerning each decision. While staff members are encouraged to express opinions, raise questions, and offer alternative solutions, it is the responsibility of the Executive Director to make the final decision. By utilizing such a decision-making process, TLE has found that good decisions can be made with a minimum expenditure of staff time.

DOCUMENTATION AND TRAINING

Perhaps the most important thing you can do to ensure the future of your organization is to document (i.e., write training manuals and instruction sheets) the systems you use and/or train many other people in their use.

Your overall management objective should be to avoid letting your program become dependent on the personalities and personal knowledge of your staff. Rather, you must develop systems to serve your clients and to obtain the resources (publicity, funds) necessary to serve them well. These systems should be well-tested, well-documented, and consistent. This sharing of knowledge and techniques is the best guarantee that your program will endure if one or more key staff members leave your organization (either by their choice, your choice, or accident).

CONCLUSION

As was stated earlier, it is believed that many listing and referral services are now defunct largely because of their failure to establish strong, stable, and predictable management systems. The time and effort you put into assembling an active and dedicated board of directors, establishing a sensible management program, and selecting a competent executive director and other staff members will have a direct payoff for your organization not only in terms of institutional stability but also in terms of the quality of service your clients can expect from your program.

A FINAL NOTE

Shortly before this book went to press, FIPSE announced the award of another grant to TLE for fiscal years 1977-78 and 1978-79. This grant will enable TLE to establish a technical assistance program to help interested and qualified people around the country to develop, maintain, and improve educational models similar to TLE.

At the time of this writing, it appears that the technical assistance program will consist of at least five parts: 1) TLE Introductory Workshops, 2) Project Directors Workshops, 3) a Network Publication, 4) On-Site Consultation, and 5) a 4-week TLE Training Program.

The Introductory Workshops will be designed to give participants an overview of TLE's operational areas as well as provide them with the most up-to-date "how to" materials and procedures for starting a similar program. In many respects, participation in an Introductory Workshop is the logical next step to reading this book, in that the workshop will afford participants the opportunity to meet with the individual TLE staff members responsible for all the areas described in the preceding chapters. These staff persons will be able to not only answer specific questions about their respective areas, but also expand upon the information contained in this publication as a result of new developments that take place at TLE subsequent to this writing. Moreover, the Introductory Workshop will afford the TLE staff person responsible for coordinating the other four technical assistance programs the opportunity to: 1) assess the needs of individual workshop participants, 2) outline ways in which TLE might help meet those needs, and 3) determine workshop participants' eligibility for becoming involved in TLE's technical assistance program.

The Project Directors Workshop will be a semi-annual, 2-3 day conference at TLE for people throughout the United States who are actively involved in the development of educational/recreational listing and referral services. The workshop will serve as a vehicle for information-sharing and problem-solving. While the workshop will be structured to meet the specific needs of participants, it is anticipated that most of the sessions will focus on such topics as: fund raising; self-support; development and maintenance of media publicity networks and neighborhood-oriented communication programs; systems for information input, storage, and retrieval; and procedures for effective management. During the two-year grant period there will be no workshop fee and since almost all the listing and referral services around the country have extremely limited financial resources, TLE will establish a modest Travel Assistance Fund for project directors who are unable to afford the total cost of traveling expenses to Chicago. These funds will be disbursed on a matching basis depending on the project directors' needs.

In order to facilitate the sharing of information and problem-solving techniques among emerging programs, TLE plans to develop a bi-monthly Network Publication describing: the progress of operational programs; new models that are developing; effective fund raising proposals; impactful public service announcements for radio and television; new interface programs; and any other practical "how-to" methods, techniques, and materials that will help the emerging network of listing and referral organizations improve the quality of their service and lower the cost of overall operations.

TLE will develop an On-Site Consultation Program whereby experienced staff persons from TLE can visit operational programs in other parts of the United States and provide them with the technical assistance needed for solving difficult developmental problems. During the two-year grant period, TLE's Executive Director, Manager of Operations, Manager of Public Affairs, Manager of Community Relations, and the staff person responsible for coordinating the technical assistance programs will each set aside 8 days for consultation. There will be no fee for this consultation during the grant period, but organizations receiving consultative assistance must cover room, board, and travel expenses.

TLE will develop a 4-week tuition-free Training Program at TLE for staff members of operational programs and prospective directors of planned programs. The program will be designed to thoroughly acquaint trainees with the many facets of TLE's operational programs. TLE will have no more than two trainees at any one time. They will receive 30 hours of training per week and work alongside TLE staff members under the supervision of the Manager of Operations. Areas of instruction and work experience will include: providing the listing and referral service to TLE clients as a telephone resource counselor; collecting feedback information; updating client listings; and any other activities that are involved in the day-to-day operation of TLE. During the remaining 10 hours per week, the trainees will have the opportunity to join full-time staff members in their meetings with potential funders, journalists, TV and radio producers, head librarians, and other people involved in helping TLE serve the residents of the Chicago area. In order to qualify for the program, trainees will have to complete a special application form. TLE staff members will select trainees for the program on the basis of their demonstrated commitment to TLE approach to education and their potential for either starting or operating a successful listing and referral service. As stated previously, during the two-year grant period, trainees will not have to pay a fee for participating in the program; however, they will be responsible for their own room, board, and travel arrangements.

In order to obtain more information about the programs described above as well as any new programs that are developed by TLE, write to TLE at: THE LEARNING EXCHANGE, P.O. Box 920, Evanston, Illinois, 60204.

APPENDIX



A TYPICAL TELEPHONE CONVERSATION WITH A FIRST-TIME ("NEW") CALLER

Burt Jones: Good afternoon, The Learning Exchange, Burt speaking. May I help you?

John Doe: Yes, I want to learn Spanish.

Burt Jones: Spanish? Fine. We have approximately 80 people teaching Spanish. Are you registered with us?

John Doe: No. *

Burt Jones: Oh, so this is the very first time you've contacted The Learning Exchange? Would you like me to tell you how the service works?

John Doe: Yes, please.

(Frequently, New Callers do not request information about a specific topic. They simply want to find out how TLE works. In the following explanation whenever you find a statement in parentheses, it applies only to New Callers who want general information about TLE.)

Burt Jones: The Learning Exchange is a not-for-profit educational and recreational service that anyone in the Chicago area can use free of charge. There are three ways you can use The Learning Exchange: if there's something you want to learn, you can find a teacher or a tutor or even someone who can answer questions over the telephone; if you have something you'd like to teach, you can find others who want to learn it—but, by the way, you don't have to teach anything in order to learn something; and we also have something called "Interest-Match" for people who don't want to teach or learn, per se, but they just want to find people who share their interests—for example, that's where you find people who are interested in book discussion groups, hobbies, writers' workshops, babysitting co-ops, partners for tennis and chess, etc.

- * If John Doe had said "Yes," then the call would be handled as described in the "Teacher, Learner, Interest Match Card Files" section of Chapter II—INFORMATION SYSTEMS.

See p. 13

The way the service works is like this: You mentioned you want to learn Spanish. (Let's say you want to learn Spanish.) After you're registered—which I'll explain later, it's fairly simple and it doesn't cost you anything—you can call us up and we'll give you the names and phone numbers, plus any background information we have, of people who have called offering to teach Spanish. You call them up, decide which one sounds the best for you, and make any arrangements with the teacher as far as where you're going to meet, when, how often, and if they're charging a fee, you work that out with them—we don't get involved with fee arrangements and we don't get a commission from teachers' fees. Then you meet with the teacher and learn Spanish! You can meet in your own home, your teacher's home, an office, a library, a community center, a church, a restaurant, the park when the weather's nice—wherever is convenient for you. Also, if we don't have a teacher on file who meets your needs, we can put you on file as wanting to learn whatever subject you're interested in, and when we get a teacher for that subject, we'll have the teacher call you.

Now before you can use the service, we ask that you register with us. All that means is you give me your name and address, I send a registration form to you in the mail, and you fill it out and mail it back to us. Then once we have the form in our office, you can call us up whenever and as often as you like to get the names of teachers, students, or people who share your interests.

Would you like me to send you a registration form, sir?

John Doe: Yes.

Burt Jones: Great! What is your name, please?

John Doe: John Doe.

Burt Jones: Let me make sure I have the spelling right. Is that J-O-H-N D-O-E?

John Doe: Correct.

Burt Jones: And your address?

John Doe: 615 Case Place, Evanston, Illinois, 60202.

Burt Jones: That's six-one-five C-A-S-E Place, Evanston, six-oh-two-oh-two.

Do you have a home phone number?

John Doe: Yes. 360-3312.

Burt Jones: Three-six-oh-three-three-one-two?

And may I ask where you heard about The Learning Exchange?

John Doe: Yes. I saw it on television—I think channel 2.

Burt Jones: Was it a television program or a public service ad?

John Doe: It was an ad, like a commercial.

Burt Jones: Okay, thank you.

Now, Mr. Doe, there's something important I should tell you about the information I'm going to send you. You're going to get a brochure which describes the service, a letter which further describes the service, the registration form we talked about, and a postage-paid envelope. Now, on the registration form, you'll see some boxes to check that have dollar figures next to them and say something about "Membership"—there's one that says \$15 One-Year Regular Membership, another one says \$7.50 Limited-Income Membership—those boxes pertain to our supporting membership program. As I said before, you don't have to pay anything to The Learning Exchange to use the service. But we do have a voluntary membership program to help keep the service going, since we don't charge a fee and we're not a part of any school system or corporation or government agency. If you want to become a supporting member, Mr. Doe, check one of the boxes that say "Membership" and send the form back to us with your membership contribution. If you become a member, you'll receive some extra benefits in thanks for your support. You'll get our Catalog, which lists more than 2,500 subjects we had on file when the Catalog was published; our quarterly newsletters, which tell what people are doing through the service—the newsletter also contains a "Catalog Update" section that tells what new topics are available, and a section called the "Members' Bulletin Board" that you can use to place free want ads about what you want to do—for example, it might say: "John Doe of Evanston wants to find a Spanish tutor." You also get a membership card and a special members' phone number that you can use when our other lines are busy. But again, the main point of membership is not to receive \$15 or \$7.50 worth of goods, but it's a contribution to help keep the service going.

Now if you don't want to become a member, or if you can't afford to become a member, there's a box at the bottom of the form that says something like, "I don't wish to become a member but I would like to use the listing and referral services of The Learning Exchange." So just check that box if you don't want to become a member and send the form back to us and as soon as we get it, you can call us up and use the service.

Well, Mr. Doe, that should give you a pretty good idea how The Learning Exchange works and how you and other people in your household might benefit from our services.

Do you have any other questions?

John Doe: No.

Burt Jones: Okay then, Mr. Doe, I'll get this packet of information to you by first class mail. As soon as you get it, take a look at the information we're sending you, decide whether or not you want to become a member, check one of the boxes on the form, and mail the form back to us.

Now, there won't be any place on the form to write down what you want to do, so give us about four or five days to receive the form; and anytime after that, just call us when you want to use the service and we'll give you whatever information you need right over the telephone.

Well, Mr. Doe, thanks so much for calling and I hope we're able to help you learn Spanish. (Well, Mr. Doe, thanks so much for calling, and I hope we hear from you soon.)

Occasionally a New Caller might ask any one of the following three questions. (Potential funders and some media people are inclined to ask the same questions.)

Q. How do you know your teachers are qualified?

A. TLE has no formal way of determining whether or not a teacher is qualified. Apparently this is not a liability since feedback from learners has been overwhelmingly positive, e.g., over 90% of the people who meet with TLE teachers indicate that they are satisfied with the instruction they receive. The small amount of dissatisfaction is usually the result of personality differences between teachers and learners, scheduling problems, incompatibility of teaching/learning styles, and fee or travel difficulties.

If a person is dissatisfied, they can call us for more names. In fact, we try to give them a number of people to choose from when they first call for contact information.

When teachers register with TLE, we ask them at what level they can teach (beginning, intermediate, and advanced) and where and how they gained their expertise. It is to the teachers' advantage to give us as accurate a description of their abilities as possible since, in most cases, they are competing with other teachers.

We ask people to call us back and let us know how things work out. If there is a serious question about a person's level of ability, we call up the teacher and check out the information we have on file. After six years of operation, there have not been any cases of malicious deceit.

In the final analysis, we believe that the student is the best judge of the teacher, not us. There are different styles of teaching for different people—what may not work for one student may be highly effective with another, e.g., we have one violin teacher who is a perfectionist—9 out of 10 students cannot stand him but for 1 out of 10 students, he's exactly what the student was looking for.

It should also be kept in mind that you can stop meeting with a teacher anytime you want. You don't pay a registration fee or prepay tuition to TLE, unlike most colleges, universities, and schools. If you do enter into a contract with a teacher or tutor, it is your business and only by your choice.

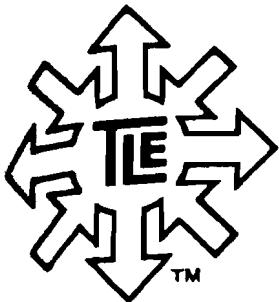
- Q. What do you do to protect your clients from weirdos, perverts, and people with illegal intentions?
- A. In our six-year history the most severe problem we've had is in the area of witchcraft. At one time, we had three women registered to teach witchcraft. Late one night (about 2:00 a.m.) someone called each teacher and using crude language, hassled them about their "silly" belief in witchcraft. On the following day each witchcraft teacher called TLE and asked that her cards be removed from the files.

In essence, what many skeptics expected to be a major problem, just hasn't materialized. The registration process that all TLE users must go through serves to verify their names and addresses. TLE resource counselors are not permitted to give the names and phone numbers of TLE clients to someone who isn't registered. Moreover we never give out addresses unless the participants ask us to give out their addresses. This procedure makes it necessary for participants to have telephone contact before arranging a face-to-face meeting. On the basis of the telephone conversation, the participants will then mutually decide whether or not they want to meet. Sometimes they'll first meet in a public place; build a trust level with one another; and then, if it is more convenient, they'll meet in one or another's home. Sometimes a participant will bring along a friend or relative just as a precautionary measure.

We've determined after six years of operation that TLE is a lot less dangerous than, e.g., 1) walking down some city streets, 2) having your name and address listed in the telephone book, 3) placing a classified ad in the newspaper, and 4) attending some night school classes. Why would potential evil-doers go through the trouble of contacting us, going through the registration process, calling us up to get names, calling the people they get, having a

record of their names on file as having obtained the names and phone numbers of other clients, etc., when there are much simpler, easier, quicker, and less risky ways available?

- Q. If harm comes to one of TLE's clients as a result of connections they made through TLE, to what extent will TLE be held liable?
- A. Since TLE has never been taken to court, we don't know. However, we have discussed this matter with three attorneys and their professional opinions were identical. Due to the nature of the service (listing willing participants and referring them to one another so they can assume the responsibility of creating their own teaching/learning/sharing arrangements), the only circumstance under which TLE might be held liable is a case of negligence on the part of TLE. Negligence could be defined as "doing something other than that which TLE purports to do" or "purporting to do something which TLE does not (cannot) do." TLE purports to be a listing and referral service whereby people who have registered with the service can be referred to others who have listed themselves for subjects, and/or they can list themselves for subjects so that others can be referred to them. Examples of negligence might include: giving out information about a client to a caller who is not registered; giving out information about a client who is not listed for a subject requested by a caller; or guaranteeing a caller that he/she can obtain a degree, job, etc. by using TLE. In other words, as long as TLE only does what it says it will do—and does not claim to do what it cannot do—TLE should never be held liable on the basis of negligence.



The Learning Exchange™

Post Office Box 920 • Evanston, Illinois 60204 • 273-3383

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Robert S. Mendelsohn
*Michael Reese Hospital
and Medical Center*

Joe L. Parkin
*Bankers Life and
Casualty Company*

Gary H. Rieman
*Combined Insurance
Company of America*

Craig Sakurai
The Filmstrip House, Inc.

Joel Sebastian

Dear Friend,

Thank you for your interest in The Learning Exchange. Enclosed is the information you requested about our service and supporting membership program. We think you'll find it interesting and the first step toward an exciting new experience for you.

The Learning Exchange is a community information service which enables you to get in touch with experts, resource people, tutors, learners, and people interested in over 3,000 subjects -- ranging from academic subjects like Accounting, Reading, and over 70 Foreign Languages to recreational subjects like Backgammon and Bowling...to vocational skills like Auto Mechanics and Computer Programming...to crafts like Welding Sculpture and Jewelry Making...to hard-to-find subjects like Tarot Cards, Meditation, UFO's, and Bagpipes.

Serving the entire metropolitan Chicago area, The Learning Exchange is making it possible for you to create your own flexible and individualized educational program. Through the connecting link of The Learning Exchange, you and others interested in teaching, learning, or sharing an interest are brought together -- either in a group, or in a one-to-one situation. You meet when and where you want -- in your home or office, community centers, libraries, parks, or anywhere you and the people with whom you are interacting find convenient.

You can benefit from The Learning Exchange in a number of ways:

- * You can learn a new subject -- to broaden your career horizons...enjoy the fun of a new sport or hobby... learn a money-saving "do-it-yourself" skill...or expand your interests in exciting new directions.
- * You are probably good in a certain subject, hobby, or skill that others want to learn. You can teach it -- either free, or at a mutually agreed-upon fee. If you'd like to tutor children or adults in basic skills like reading and math, we'll let you know who in your neighborhood needs help.
- * You can find people who share your interests or concerns -- to discuss a book you've read or a theory that interests you...start a baby-sitting co-op... play tennis or chess. The possibilities are endless!

See pp. 58 and 59

NEW CALLER SOLICITATION LETTER (2nd Page)

More than 35,000 people have participated in the program locally, and more than 70 similar services have been started in different parts of the United States and abroad. Articles about The Learning Exchange have appeared in Reader's Digest, Time, The Wall Street Journal, Psychology Today, McCall's, and The Christian Science Monitor, as well as all of Chicago's major daily newspapers, many neighborhood weekly newspapers, and several company and organization newsletters. Staff members from The Learning Exchange have been interviewed on more than 100 radio and television talk shows.

As a not-for-profit, tax-exempt organization, The Learning Exchange provides its services to the public at no charge. For financial support it depends primarily upon voluntary annual membership contributions of \$15.00. We'd like you to become a member.

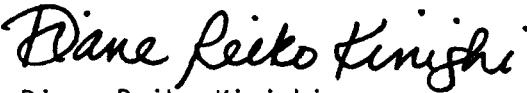
Your Membership entitles you to:

- * The Learning Exchange Catalog listing more than 2,500 subjects on file
- * Our Quarterly Newsletter informing you of new offerings and developments
- * A membership card
- * Our special "Members' Private Phone Number" which makes it easier for you to reach us

The Learning Exchange gives you a unique opportunity to try something new -- to meet new people -- to learn new things -- all in a thoroughly enjoyable, informal atmosphere. That's why we hope you'll join the thousands of other people participating in this fresh new approach to education. Just complete the enclosed membership application card and mail it to us today, with your check or money order, in the postage-paid envelope. Your Member's kit will be mailed to you promptly. If you cannot become a member at this time, but would like to use our services, check the appropriate box on the application card and mail it to us.

We sincerely hope we'll have the pleasure of serving you soon and look forward to receiving your application card at your earliest convenience. If you have any questions, just pick up the phone and call us at 273-3383. We'll be happy to help you.

Sincerely yours,


Diane Reiko Kinishi

Diane Reiko Kinishi
Executive Director

P.S. For income-tax purposes, your membership contribution is tax-deductible to the extent allowed by law.

THE LEARNING EXCHANGE™



is a way to

S A M P

- share your skills and knowledge
- learn something you always wanted to learn
- meet people interested in the same things you are
- find tutors for yourself and your children
- start or join a club
- supplement existing school curricula
- learn a job skill
- get involved in action projects and citizens' groups
- learn something at little or no cost
- make use of untapped human resources
- find partners for games and sports
- earn extra money by tutoring or teaching
- turn your telephone into an encyclopedia
- find or form classes and discussion groups



design your own
individualized educational or recreational program

CREATE YOUR OWN EDUCATION



The process begins with
your telephone call to
The Learning Exchange



THE LEARNING EXCHANGE
IS THE CONNECTING LINK
BRINGING PEOPLE WITH
DIVERSE NEEDS, ABILITIES
AND INTERESTS TOGETHER



• THE LEARNING EXCHANGE STAFF
WORKS 68 HOURS A WEEK TO
PUT YOU IN TOUCH WITH:



PEOPLE WHO WANT TO LEARN Almost everyone can teach something. Can you speak French, sew, take shorthand, or fix a car? No matter what you know, there's probably someone who wants to learn it. You may teach a group, or tutor individuals — or both, if you like. You may also charge a fee for your services if you wish — about 50% of our teachers charge a fee or have sliding scales, while 50% teach or tutor at no charge.



PEOPLE WHO TEACH Want to learn macrame, mandolin, mathematics, or mime? The Learning Exchange has teachers in over 1,000 topics. If we don't have what you're looking for, we'll put you on file and as soon as we get a teacher, we'll have them call you.

PEOPLE WHO ANSWER QUESTIONS Puzzled by a philosopher's writings? Baffled by the blots, points, and tables of backgammon? Having trouble house-breaking your puppy? Get your question answered by calling us for the name of the expert you need. IF YOU CAN ANSWER QUESTIONS about a certain subject, please list yourself with us. When people call with a question in your area of skill or knowledge, we'll refer them to you.

PEOPLE WHO SHARE YOUR INTERESTS wish there was a way to find people who want to play Scrabble, go sailing, start a baby-sitting co-op, discuss a book you've read, Now there is. Just call the Learning Exchange and we'll put you in touch with people who share your interests or concerns.

R RECREATIONAL PROGRAM

The Learning Exchange is a new concept in education based on an idea that has been around for a long time. People teaching people — on their own time — at their own pace — in their own homes, community centers, libraries, churches, and offices.

The process is simple. If there's anything you want to teach or learn, or if you have an interest you'd like to share with others, just call The Learning Exchange. We'll give you the names and phone numbers of people who suit your needs, abilities, or interests. You call them and decide where and when to meet, how often, what materials or texts to use, whether or not there will be a fee and if so, how much. You can also list yourself in our files so that future callers will be referred to you. There are no entrance

requirements, nor are degrees and certificates issued or required of people who wish to teach through the service. You do not have to teach something in order to use The Learning Exchange — the word "Exchange" in our name does not mean that you must exchange your knowledge for someone else's.

Since The Learning Exchange was established in May 1971, over 33,000 people of all ages, races, educational backgrounds and socio-economic levels have used its listing and referral services. By 1976, participants registered more than 2,500 topics. We hope you benefit from our program as much as they did. We also hope you choose to support this much-needed service by becoming a member today!

MEMBERSHIP PROGRAM

The Learning Exchange is a not-for-profit, tax-exempt organization. It is not affiliated with any government agency, corporation, school district, or university. It is financed solely by voluntary contributions and memberships. While the information services of The Learning Exchange are available to the public at no charge, members receive the following extra benefits:

- * The Learning Exchange Catalog listing over 2,500 topics
- * Quarterly newsletters informing you of new offerings and developments
- * A membership card
- * Your special "Members Only" telephone number at The Learning Exchange to ensure you faster service

**JOIN
THE LEARNING EXCHANGE
TODAY**

IF YOU HAVE ANY QUESTIONS, PLEASE TELEPHONE US AT:

273-3383 • 864-4133

NEW CALLER BROCHURE (4th Page)

"Male, female, black, white, old, young, collegiate, hard-hat — you are what The Learning Exchange is all about . . . It's all up to you, your life, your experience; in essence, it's your cumulative knowledge. You are a living university whether you work with your head or your hands".

Mike LaVelle, Chicago Tribune

"The Learning Exchange has proven itself to be an exciting alternative to formal classroom education. This unique educational program has given many people an opportunity to learn subjects not usually offered in the curriculum of most schools."

Governor Dan Walker

"With some 1,300 topic listings (now over 2,000), The Learning Exchange aims to suit any fancy . . . from people of all ages and all walks of life."

The Christian Science Monitor

"The Learning Exchange is one attempt to meet the needs of those who aren't being served by existing institutions."

John Holt, educator and author

"I have been pleased in the past few years to bring to the attention of my colleagues the founding and growth

of a unique organization, The Learning Exchange of Illinois. The Learning Exchange has been growing by leaps and bounds in recent months, and I look with pride on the success that Illinoisans Denis Detzel, G. Robert Lewis, and their associates have had with this innovative concept of person-to-person education and training."

Senator Charles H. Percy

"For the price of a phone call or a postage stamp, many people are getting access to education they wouldn't otherwise get."

The Wall Street Journal

"The Learning Exchange is based on the simple concept that every community in the world is a storehouse of educational resources, and their aim is to get us to share these resources with one another."

Lerner Newspapers

"Congratulations on your efforts to help people make a difference for other people. This is the purest form of humanism and it is greatly needed in America today."

Senator George McGovern

SAMPLE



THE LEARNING EXCHANGE™

Post Office Box 920 / Evanston, Illinois 60204

273-3383 • 864-4133

9 am to 9 pm Monday through Friday 9 am to 5 pm Saturday

Serving All Metropolitan Chicago

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MEMBERSHIP/REGISTRATION APPLICATION FORM

YES, I want to become a member of The Learning Exchange. I understand that my catalog, membership card, and special "members only" telephone number will be mailed to me as soon as my membership dues are received, and my four quarterly newsletters will follow as each issue becomes available. I also understand that the day after this application card is received, I can begin using the listing and referral services of The Learning Exchange.

Enclosed is my check for:

\$15 One Year Membership \$25 Two Year Membership \$30 Three Year Membership

(\$7.50 Limited Income Membership for senior citizens and
other low-income persons who cannot afford Regular Membership)

Name

Date

Address

Home Phone

City State Zip

Work Phone

Thank you, but I don't wish to become a member of The Learning Exchange at this time. However, I would like to use your listing and referral services. I understand that to do so, I must check this box , complete the bottom half of this card, and return it to The Learning Exchange.

© 1978 by The Learning Exchange, Inc.

NC-LI

See pp. 13 and 59 — especially note the problems with membership options as described on pp. 57 and 58.

See p. 59

BUSINESS REPLY ENVELOPE ("BRE" — POSTAGE PAID)

FIRST CLASS
Permit No. 1102
Evanston, Ill.

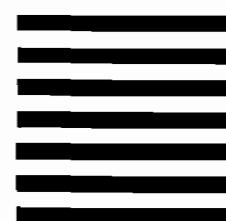
BUSINESS REPLY MAIL

No postage stamp necessary if mailed in the United States

Postage will be paid by



The Learning ExchangeTM
P. O. BOX 920
939 HINMAN AVENUE
EVANSTON, ILLINOIS 60204



BUSINESS ENVELOPE (#10)

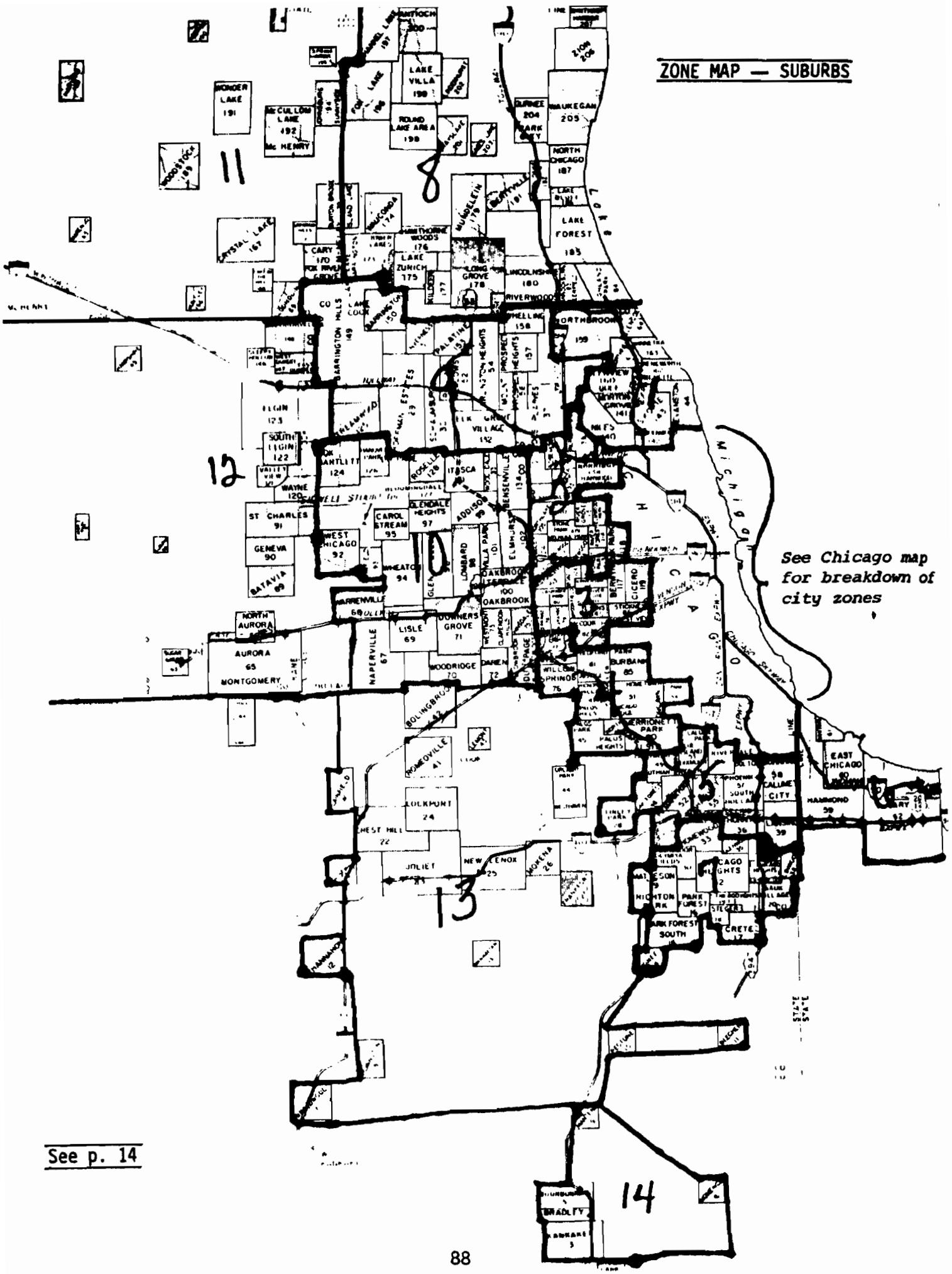
The Learning ExchangeTM

Post Office Box 920 • Evanston, Illinois 60204



See p. 59

ZONE MAP — SUBURBS





"THANK YOU FOR BECOMING A MEMBER" LETTER

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• Dave Baum
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• Shai Beugan
WBBL-AM

Terry P. Brown
The Wall Street Journal

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James D. Houy
McGraw-Edison Corporation

Mike LaVelle
Chicago Tribune

Sherwin M. Levinson
AMOCO Chemicals Corporation

Robert R. McClaren
North Suburban Library System

Robert S. Mendelsohn
*Michael Reese Hospital
and Medical Center*

Joe L. Parkin
*Bankers Life and
Casualty Company*

Gary H. Rieman
*Combined Insurance
Company of America*

Craig Sakurai
The Filmstrip House, Inc.

Joel Sebastian

Dear New Member:

Welcome to The Learning Exchange!

We're delighted that you have chosen to become a member. It's people like you -- active, aware, and supportive -- who make The Learning Exchange possible.

You are now entitled to use The Learning Exchange any time and as often as you like during our 68 hours of operation per week. It's simple to take advantage of your membership to learn, teach, or share your interests with others! Just give us a call at your "members' private phone number" printed on the back of your membership card or 273-3383 -- if the latter, please tell us you're a member when you call.

Should you ever have any questions, comments, criticisms, or suggestions about our service, materials, or any other facet of The Learning Exchange, please let me hear from you. I'll be happy to do whatever I can to make and keep your membership fruitful and fun for you. Your feedback is vitally important to the success of the service, especially since you are now one of the more than 5,000 supporting members who keep The Learning Exchange going and growing.

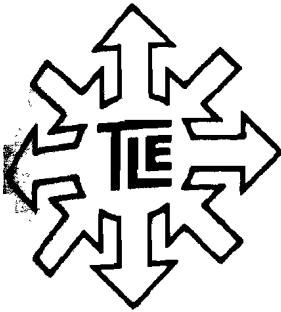
Our sincere thanks again for joining us as a member. We look forward to serving you soon.

Cordially yours,

Diane Reiko Kinishi

Diane Reiko Kinishi
Executive Director

See p. 15



INTRODUCTORY LETTER TO MEDIA PERSON

THE LEARNING EXCHANGE

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WBBM-AM (CBS)

Dave Baum
WIND Radio (Group W)

Terry P. Brown
The Wall Street Journal

David J. Christensen
CNA Financial Corp.

Charles Curry
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Bob Hale
WMAQ-TV (Channel 5)

William R. Hazard
Northwestern University

James D. Houy
Johns Hopkins Hospital Supply Corp.

Mike LaVelle
Chicago Tribune

Sherwin M. Levinson
Standard Oil Company (Indiana)

Robert S. Mendelsohn
Michael Reese Hospital

Gary H. Rieman
Frank & Jessie V. Stone Fdn.

Joel Sebastian
WMAQ-AM (NBC)

May 20, 1975

Mary Jane Hayes
"It's Worth Knowing About Us"
WBBM-TV
630 North McClurg Court
Chicago, Illinois 60611

Dear Ms. Hayes:

As a former teacher, we thought you'd like to be informed about the new approach to community education we started four years ago on a \$25 grant.

The enclosed materials describe how The Learning Exchange has grown, how it works, and how Chicago area residents are creating their own teaching/learning/sharing situations through our free service.

Our goal is to see Chicago move from "what is" to "what can be" in education. We believe our emphasis on people rather than programs will help make it possible.

We would welcome the opportunity to share with the viewers of "It's Worth Knowing About Us" some of the many ways they might benefit from our not-for-profit organization.

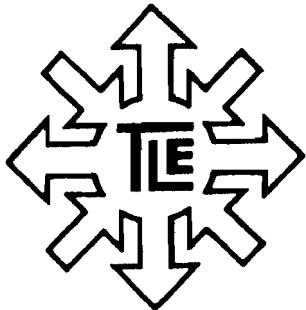
On Tuesday, May 27, I'll telephone you so we can talk about this further.

Sincerely yours,

G. Robert Lewis
Director of Public Affairs

GRL/dr

See p. 26



"THANK YOU" LETTER AFTER MEETING

THE LEARNING EXCHANGE

Post Office Box 920 • Evanston, Illinois 60204 • 273-3383

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American Hospital Supply Corp.

Mike LaVelle
Chicago Tribune

Sherwin M. Levinson
Standard Oil Company (Indiana)

Robert S. Mendelsohn
Michael Reese Hospital

Gary H. Rieman
W. Clement & Jessie V. Stone Fdn.

Joel Sebastian
WMAQ-AM (NBC)

May 29, 1975

Mary Jane Hayes
"It's Worth Knowing About Us"
WBBM-TV
630 North McClurg Court
Chicago, Illinois 60611

Dear Mary Jane:

Thank you for the opportunity to meet with you yesterday. We're quite pleased that you are going to help us inform more Chicago area residents about how they can benefit from the services of The Learning Exchange.

Diane and I are looking forward to the taping of an interview with you on June 6. As you requested, we'll meet you at WBBM-TV by 9:00 AM.

In the meantime, if you need any additional information, please don't hesitate to call me.

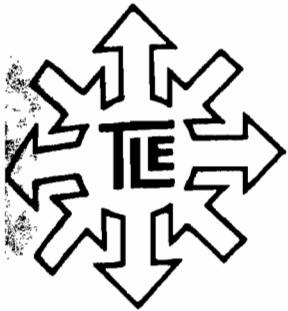
See you soon.

Cordially,

G. Robert Lewis
Director of Public Affairs

GRL/dr

See p. 28



"THANK YOU" LETTER AFTER TELEVISION INTERVIEW

THE LEARNING EXCHANGE

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Francine Bartolacci
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Dave Baum
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Terry P. Brown
The Wall Street Journal

David J. Christensen
CNA Financial Corp.

Charles Curry
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Sherry B. Goodman
WTW-TV (Channel 11)

Hurley Green, Sr.
Independent Bulletin

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Sherwin M. Levinson
Standard Oil Company (Indiana)

Robert S. Mendelsohn
Michael Reese Hospital

Gary H. Rieman
Clement & Jessie V. Stone Fdn.

Joel Sebastian
WMAQ-AM (NBC)

June 25, 1975

Mary Jane Hayes
"It's Worth Knowing About Us"
WBMM-TV
630 North McClurg Court
Chicago, Illinois 60611

Dear Mary Jane:

Diane and I express our gratitude for your interviewing us on "It's Worth Knowing About Us". It was a real pleasure working with you. Both of us were impressed by your professionalism and incisiveness. Thank you for being so thorough.

So far about thirty new people have begun using the service as a result of the show. Also, we have found there is usually a residual effect -- lots of folks jot down the phone number and wait anywhere from a month to a year to call in. So, we expect that more calls will come in as time goes on.

By the way, if you are ever in the Evanston area, please do stop by and visit us. I think you might enjoy seeing the "inside" operation and we'd be delighted to show you how everything works.

Both Diane and I are eagerly looking forward to working with you again on the series you had talked about. Please let us know if there is anything you'd like us to do in the meantime.

Best wishes and thanks again.

Sincerely,

G. Robert Lewis
Director of Public Affairs

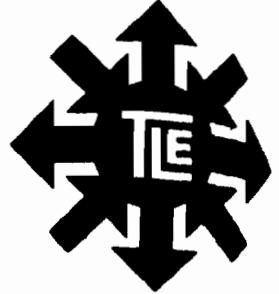
GRL/dr

See p. 28

10 SECOND PSA

The Learning ExchangeTM

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THIS SUMMER YOU CAN LEARN A NEW LANGUAGE THROUGH THE LEARNING EXCHANGE. FOR FREE INFORMATION CALL THE LEARNING EXCHANGE AT 273-3383.

G. Dennis Conroy 273-3385
Manager, Public Affairs

The Learning Exchange is a not-for-profit, tax-exempt educational organization providing free people-to-people referral services for residents of Chicago and the surrounding suburbs.

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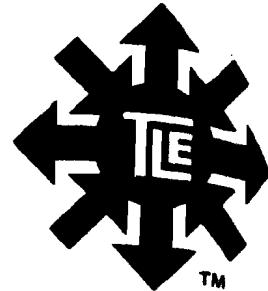
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THIS SUMMER LEARN OR TEACH A LANGUAGE, GET INVOLVED IN A SPORT, DEVELOP NEW SKILLS, AND MUCH MORE THROUGH THE LEARNING EXCHANGE. LET THE LEARNING EXCHANGE HELP YOU PLAN YOUR SUMMER ACTIVITIES. CALL TODAY FOR FREE INFORMATION AT 273-3383. THAT'S 273-3383.

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THIS SUMMER LEARN OR TEACH A LANGUAGE, GET INVOLVED IN A SPORT, FIND A TUTOR, AND MUCH MORE THROUGH THE LEARNING EXCHANGE. THE FREE PEOPLE-TO-PEOPLE REFERRAL SERVICES OF THE LEARNING EXCHANGE CAN PUT YOU IN TOUCH WITH PEOPLE WHO WANT TO LEARN, TEACH, AND SHARE THEIR INTERESTS IN ACADEMIC TUTORING, BASEBALL, SWIMMING, BICYCLING, SAILING, JOGGING, TENNIS, AND MANY OTHER SUMMER ACTIVITIES. CALL TODAY FOR FREE INFORMATION, 273-3383.

G. Dennis Conroy 273-3385
Manager, Public Affairs

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60 SECONDS

THIS SUMMER LEARN OR TEACH A LANGUAGE, GET INVOLVED IN A SPORT, FIND A TUTOR, AND MUCH MORE THROUGH THE LEARNING EXCHANGE. CALL 273-3383 AND LET THE LEARNING EXCHANGE'S FREE PEOPLE-TO-PeOPLE REFERRAL SERVICES PUT YOU IN TOUCH WITH INTRIGUING INDIVIDUALS FROM THE CHICAGO AREA WHO HAVE UNIQUE TALENTS, UNUSUAL HOBBIES, AND POPULAR SKILLS TO SHARE. THROUGH THE LEARNING EXCHANGE YOU CAN CONTACT PEOPLE WHO WANT TO LEARN, TEACH, AND SHARE THEIR INTERESTS IN ACADEMIC TUTORING, BASEBALL, SWIMMING, BICYCLING, SAILING, JOGGING, TENNIS, AND MANY OTHER SUMMER ACTIVITIES. OVER 30,000 CHICAGO AREA RESIDENTS HAVE DISCOVERED THE LEARNING EXCHANGE, AND THEY'VE REGISTERED OVER 3,000 DIFFERENT TOPICS THAT YOU CAN GET INTO. FIND OUT HOW YOU CAN ADD TO YOUR SUMMER FUN THROUGH THE LEARNING EXCHANGE. CALL TODAY AT 273-3383 FOR FREE INFORMATION. THAT'S THE LEARNING EXCHANGE, 273-3383.

G. Dennis Conroy 273-3385
Manager, Public Affairs

The Learning Exchange is a not-for-profit, tax-exempt educational organization providing free people-to-people referral services for residents of Chicago and the surrounding suburbs.

Suburban Trib

Wednesday, Sept. 22, 1976

'Learning Exchange' puts sports nuts in touch

By Chuck Frank

IF YOU'RE INTERESTED in learning the fine points of celestial navigation, there's a place that can put you in touch with an instructor. If you're interested in teaching the mechanics of javelin throwing, the same place can put you in contact with students. If you're interested in exploring caves with other adventurers, they can point you in the direction of fellow spelunkers.

The place is called The Learning Exchange, and the offbeat is part, but certainly not all, of the center's unique service. The exchange can also put you in touch with students or teachers or participants interested in virtually any craft, hobby, or study, as well as a you-name-it range of sports and games — baseball, chess, swimming, darts, tennis, scrabble, golf, skiing for the handicapped, unicycling, bridge, auto racing, canasta, glider flying . . .

The operation is simple. Call 864-4133 and state your interest and the capacity in which you would like to function, be it instructor, pupil, competitor or whatever. Fill out an application, pay the voluntary \$15 fee if you're inclined to get on the mailing list, and

the exchange will make available to you the names and numbers of people in your area who you might be interested in contacting.

FROM THERE ON it's up to you. Some instructors charge a fee, others work gratis. Often you strike your own bargains, perhaps receiving canoeing lessons for a bottle of wine, giving boxing instruction in return for a 6-pack of beer, or exchanging your expertise for someone else's.

One couple, for example, teaches Rumanian under the language listings in return for an occasional dinner out.

"It's an alternative to structured, strict, cold, in-class learning," says Anne Fritz, a referral assistant at the Evanston-based center. "There might be two people working together or up to a small group. There're not really classes. You just get together where and when you and the people you're getting together with want to meet."

When The Learning Exchange first started in 1971, the names of people listed as possible contacts were kept on file cards in a single shoebox. Today there are about 3,000 separate subjects listed and about 40,000 people availing themselves of the not-for-profit ser-

vice. The exchange lists names of people with expressed interests from Gurnee to Geneva, into Chicago and across the Indiana border. There are even members abroad.

SPORTS AND GAMES referrals are among the most frequently requested category [language is the most popular]. "We get around 150 calls a week for sports and games," notes Director of Public Affairs Bob Lewis. "The physical fitness category, including things like bodybuilding weight-lifting, and yoga is pretty popular, too."

"Because of our name people think they have to teach in exchange for learning, but they don't, of course. You don't have to teach or learn at all. We get a lot of calls in the interest-match category, where people want to find companions or other participants in the area they're interested in."

Lewis worked his way through college by doing stunt parachuting with a friend, arriving in front of drive-in movie screens dressed as Batman and Robin at \$300 a crack. Needless to say, parachuting is one of the 3,000 subjects the exchange has an index on.

CONNIE MOLLISON of Skokie can talk about dummy rip cords and static lines with the best of them as a result of a call she made to the learning exchange in May. "What really got me interested was that I met someone at a party who had a broken leg from parachuting," she explains. "I called in because I was interested in several things they offer: — that, bagpipe lessons, highland dancing.

The exchange put Mollison in touch with Bud O'Conner, an instructor with the Southern Wisconsin Sky Hawks in Bristol and an initial 6-jump lesson was set up for the standard \$100 fee. "I couldn't even begin to

Suburban Trib Sports

count all the times I've driven back there," says Mollison. "Once you get started everyone there tries to help you as much as they can. I jumped once and said, 'Oh, wow.' "

Mollison's holding her kilts in abeyance for awhile. But when she decides to develop some more talents, The Learning Exchange will still have the names and numbers on file for her.

See p. 32

Reprinted, courtesy of
the Chicago Tribune.

SPECIAL INTEREST
NEWSPAPER ARTICLE

Chicago Tribune

Wednesday, May 18, 1977

Action line

Q—A friend told me that some time ago she read about glass blowing. I am very interested in it and would like to find someone to teach me. The Park District and other places I've checked don't offer any such courses. Can you locate an instructor for me?

Barbara Torres, Northwest Side

A—We referred your letter to The Learning Exchange in Evanston which tells us that it has two people on file to teach glass blowing. Suzanne Sciez of the exchange has sent you a registration packet and, as soon as you are registered, you will be supplied with the needed names and telephone numbers. Some other interesting things The Learning Exchange can help



"Glass Blowing": Along with "How to Bank in Peking" and "Papal Audiences," a subject for The Learning Exchange

people with are the keeping and breeding of insects, how to obtain a papal audience, how to open a Swiss bank account [however, the source recommends Peking banks over Swiss banks because Swiss banks occasionally fold], and how to handicap horses. To use the services of The Learning Exchange, call 273-3383 or write P.O. Box 920, Evanston, Ill. 60204.

Reprinted, courtesy of the Chicago Tribune.

See p. 33

**Looking for Something
to Do?
The Learning Exchange
has over
3,000 activities
waiting for you!**



You can learn over 50 languages, get into 100 different arts and crafts, play anyone of 50 musical instruments, find partners and competitors for over 125 games and sports, plus much, much more. Call the Learning Exchange at

273-3383

9am-9pm, Monday-Friday; 9am-5pm Saturday

for free information



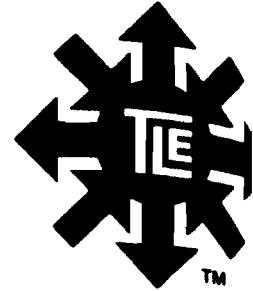
The Learning Exchange™

P.O. Box 920
Evanston, Illinois 60204
Serving Chicago and its suburbs

The Learning ExchangeTM

Post Office Box 920 • Evanston, Illinois 60204 • 273-3383

April 14, 1977



THE LEARNING EXCHANGE TO HOLD THIRD WORKSHOP

The Learning Exchange, metropolitan Chicago's independent, not-for-profit educational and recreational listing and referral service, will conduct its third workshop for people who want to set up similar services in other cities on May 13th and 14th, 1977. Members of The Learning Exchange's Board of Directors and staff will conduct the workshop at The Learning Exchange, P.O. Box 920, 939 Hinman Ave., Evanston, Illinois 60204.

In the city of Chicago and surrounding suburbs over 30,000 residents of all ages are learning, teaching, and sharing their interests in over 3,000 subjects through The Learning Exchange.

Since The Learning Exchange began in May, 1971, more than 4,000 people across the United States and around the world have written for information. As a result of this interest from diverse sources, The Learning Exchange decided to hold periodic workshops.

The last workshop, held on October 16, 1976, was attended by eleven people from all parts of the United States and Canada. Seven independent organizations similar to The Learning Exchange have been started, or are in the planning stages, due to that workshop.

-more-

PRESS RELEASE (2nd Page)

The primary goal of the Two-Day Workshop is twofold: (1) Provide participants with the necessary tools that will enable them to tap the unused and underutilized educational resources that exist in their communities; (2) Plan simple and inexpensive ways to make those resources available to members of their communities.

Persons interested in The Learning Exchange's Two-Day Workshop should contact G. Dennis Conroy at: The Learning Exchange, P.O. Box 920, 939 Hinman Ave., Evanston, Illinois 60204, or phone Mr. Conroy at 312/273-3385.

Press Contact: G. Dennis Conroy
Manager, Public Affairs
312/273-3385

PEOPLEPHILE™

peo·ple·phile (pē'-pəl-fīl), n. A collection of intriguing individuals from the Chicago area who have unique talents, unusual hobbies, popular skills to share, and other newsworthy interests; compiled periodically by The Learning Exchange as a free service for feature editors, magazine and newspaper writers, TV and radio show producers, and others in the media.

JULY, 1977

IN THE SWIM

A-58

The Learning Exchange lists a young woman who can help children and adults who are uneasy around water overcome their fear and learn to swim. She's a Red Cross certified Water Safety Instructor employed as a therapist at a treatment center for emotionally disturbed children. Her own swimming instructor, in California, trained under Olympic coach Charles Sava; she uses his method along with Red Cross techniques, and combines them with her professional knowledge of psychology. A Near-Northsider, she has access to a pool in the city, but will travel as far as Evanston. She charges \$5 a lesson, plus any pool fee.

STASH IT (FAR) AWAY

A-59

Did you ever hear of the island in the Caribbean Sea that allowed people to set themselves up as a bank--with all the obvious (and not so obvious) benefits? A Learning Exchange member from Skokie who says he likes to investigate the unusual can tell you that story, and many others he's come across while looking into exotic ways of investing money. He'll tell you how to set up a Swiss bank account, but you may be more inclined to open an account with the Bank of Peking after learning the pros and cons of each respective banking system. An engineer by profession, his financial investigations are his chief hobby.

For contact information on anyone listed in "PEOPLEPHILE," please call G. Dennis Conroy at 273-3385 and refer to the code number in the right-hand margin. Any acknowledgment of The Learning Exchange's help would be appreciated.



The Learning Exchange™

Post Office Box 920 Evanston, Illinois 60204

PEOPLEPHILE JULY, 1977

SHOWS FOR SENIORS

A-60

He's a popular entertainer at senior citizens' centers and nursing homes in his neighborhood on Chicago's Near-Northside. The shows he puts on consist of humor, bits of philosophy, poetry, and songs that quickly fill an hour and are free of charge. A senior citizen himself, he sings in English, Hebrew, and Yiddish--the songs range from popular classics (Al Jolson's and Perry Como's) to religious (Chassidic) music. He varies the performance to suit particular audiences. Some of his humor, he says, is a little "off-color," but the seniors love it. He is willing to travel throughout the Chicago area, if transportation is provided, and he requires a piano accompanist for his songs.

TACK DOWN A NEW SKILL

A-61

The Learning Exchange lists a master craftsman. He's an upholsterer who can custom design and build furniture, remodel old pieces, and make fragile antiques usable again. He is anxious to find an apprentice--someone who wants to learn the trade from the ground up with the goal of becoming a professional. He says there are no prerequisites except serious intent and real willingness to learn. However, if you only want advice about a pet project, such as redoing a favorite chair or custom-finishing a van, he will give it free, of charge. You may phone him or drop by the garage-workshop in back of his Irving Park home.

RENT A HORSE

A-62

If you'd like to enjoy the out-of-doors on horseback this summer, call The Learning Exchange. Find out how, for only \$5, you may rent either of two horses or a pony for an afternoon's ride in a Calumet City forest preserve. The animals are family pets offered because they need to get more exercise and the fee will help pay for their board. They are gentle--no experience is necessary to ride them. A corral is available if you want to practice before setting out for the trails.

ART THERAPY

A-63

The Learning Exchange lists a talented artist and certified art teacher who specializes in teaching arts and crafts to the physically and mentally handicapped. Her background includes teaching Art and Nature courses for the Evanston Environmentalist Association, crafts at a Chicago Mental Health Center, painting and drawing at YMCAs, and basket weaving and print-making at Oakton College. A Northbrook resident, she will travel to north and northwest suburbs. Her usual fee is \$10 an hour, but she will exchange art lessons for help with her garden or household repairs.

RIDING THE RAILS

A-64

He's loved trains since childhood and, happily, now is employed as a Community Relations Coordinator with the Chicago Transit Authority. As part of his job, he makes presentations to schools and civic groups about CTA services and conducts tours of the system. Being blind, he is particularly aware of the many clues blind people can use in riding mass transit. He can explain, for example, how to identify CTA stops by sound.

A "NATURAL" CURE

A-65

The Learning Exchange lists a 72-year-old woman who attributes her "unbounded energy" and "nearly perfect health," after years of suffering from rheumatoid arthritis, to homeopathy, a healing method based on the use of herbs and minerals. Homeopathic drugs, she explains, treat the causes of poor health as well as the symptoms; and they help cure "mental negativism," or depression, which is "a part of every illness." A River Grove resident, she offers advice free of charge on the uses of homeopathy or, in cases of serious illness, refers those interested to a licensed M.D. who uses the method.

AROUND THE WORLD

A-66

From South America to Africa, from Scandinavia to Morocco--name a country and chances are good The Learning Exchange lists someone who's traveled or lived there. An Evanston woman spends one or two months each year in a different part of the world. She's seen sea lions and birds that are as tame as house pets on the Galapagos Islands; marched in street parades in Portugal (to celebrate a new political regime); and found off-the-beaten-track places to dine in Morocco. If you are planning a trip and would like advice about what to take, where to stay, things to do and see, call The Learning Exchange.

CAN MEDITATION WORK FOR YOU ?

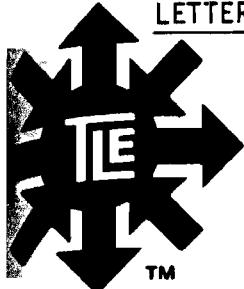
A-67

Yes it can, maintains a high school English teacher who studied meditation under Swami Rama at the Himalayan Institute in Glenview. She says the technique can be used to help people lose weight, ease physical pain, or gain a better understanding of interpersonal relationships. A Rogers Park resident, she will teach it free of charge at nursing homes and senior citizens' centers. Her usual fees, for individuals or groups, are minimal; a single two-hour session may be all you need to learn the basics.

WHY JOHNNY CAN'T READ

A-68

You know why Johnny can't read. He's been diagnosed as having a learning disability. The Learning Exchange lists a man with a Masters Degree in Learning Disabilities who's had 7 years experience at a public school in Libertyville teaching kids like Johnny. He understands that they are easily distracted, have difficulty concentrating, and thus can't organize their thinking. With the right kind of tutoring, he says, they can begin to use simple logic to solve problems they thought were impossible. Once they gain confidence in their ability to succeed, they do succeed. He will also work with you to show you how to help your child at home. A Morton Grove resident, he'll travel within a 10-mile radius of his home.



The Learning ExchangeTM

Post Office Box 920 • Evanston, Illinois 60204 • 273-3383

Date _____

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The Wall Street Journal

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Casualty Company

Gary H. Rieman
Combined Insurance
Company of America

Craig Sakuras
The Filmstrip House, Inc.

Joel Sebastian

Name _____

Library _____

Address _____

City, State, Zip _____

Dear _____,

As a librarian, you are always interested in expanding your resources and providing your patrons with services designed to meet their needs. A Learning Exchange Library Membership can help your library continue to be a vital part of your community by complementing your present resources.

Enclosed are some of the local and national news articles which have been written about The Learning Exchange, plus a copy of a recent newsletter and current Catalog. Also included is a list of the benefits your library will receive as a Library Member. As you will see, these benefits help member libraries take fullest advantage of the wide range of services available to them through The Learning Exchange.

Since the inception of our Library Membership Program, librarians have found many creative and valuable ways in which to use the service. Access by your library to the listing and referral services of The Learning Exchange will enable your library to use these services in a variety of ways:

- * You can find people to share their knowledge and experience for your library's programs and activities. For example, the Indian Trails Public Library District in Wheeling has used The Learning Exchange to find teachers for their crafts classes in such subjects as fancy food decorating and stained glass terrarium construction. Whether you want someone to conduct a workshop in a popular craft, skill, or game; demonstrate a unique hobby; set up an exhibit in your lobby; provide special programs for children; or lead discussions of any book from the classics to newly published volumes; The Learning Exchange can help you find the people you need.

- * You can list any of your activities, programs, and special collections with The Learning Exchange. Several city and

suburban libraries have already listed their resources such as self-study programs and special collections in anything from genealogy to sailing. This facet of our service is an excellent way to publicize your activities and resources and to attract new people to your library.

- * You can furnish your patrons with an additional resource to enhance their self-directed learning programs. One example of this exciting way in which libraries and The Learning Exchange work together involved a man who was interested in hydroponics. The books at his local library gave him a good solid start in the field. When he ran into difficulties which he felt required the advice of an experienced hydroponic gardener, The Learning Exchange referred him to the experts he needed.
- * You can complement your printed collection and other resources available to you through the "telephone encyclopedia" aspect of our service. Our "telephone encyclopedia" consists of more than 3,000 individuals throughout the Chicago area who have expertise, and sometimes rare and extensive personal libraries, in their fields of interest. One frequent user of this unique and convenient way to supplement existing resources is the System Reference Service of the North Suburban Library System. They have contacted us for experts in a wide range of subjects, including parliamentary law, restoration of reed organs, medieval martial arts, exotic foreign languages, dance, and Chicago History. Their librarian calls The Learning Exchange "an invaluable resource" and explains that "often these 'Learning Exchangers' have provided in-depth and up-to-date information not available elsewhere."

These are just a few ways in which your library can use The Learning Exchange. We hope that you will find, as many other libraries have already found, that a Learning Exchange Library Membership is a valuable aid to you and your staff in serving your community. To join, simply fill out the enclosed application form and return it to the Learning Exchange with your check in the postage paid envelope provided. Your benefits will be mailed immediately, and you will be contacted to arrange a convenient time for your library's Special Workshop.

If you have any questions about The Learning Exchange or our Library Membership Program, please feel free to call me at 864-4136 or 273-3385. We look forward to serving you soon.

Sincerely,

Edward R. Dobmeyer
Manager, Community Relations

THE LEARNING EXCHANGE™ LIBRARY MEMBERSHIP PROGRAM

The following benefits are available to libraries that become special members of The Learning Exchange:

★ Five copies of The Learning Exchange Catalog

A listing of 2500 educational and recreational topics registered with The Learning Exchange plus information describing how to use the service

★ Five copies of The Learning Exchange News

Published quarterly, the newsletter updates the catalog, presents articles on members who are using the service in ordinary or unique ways and offers a means for members to make known their needs, skills or interests

★ A special workshop for the library staff

A representative from The Learning Exchange will visit your library to describe ways you and your users can benefit from the service

★ Special displays for your users

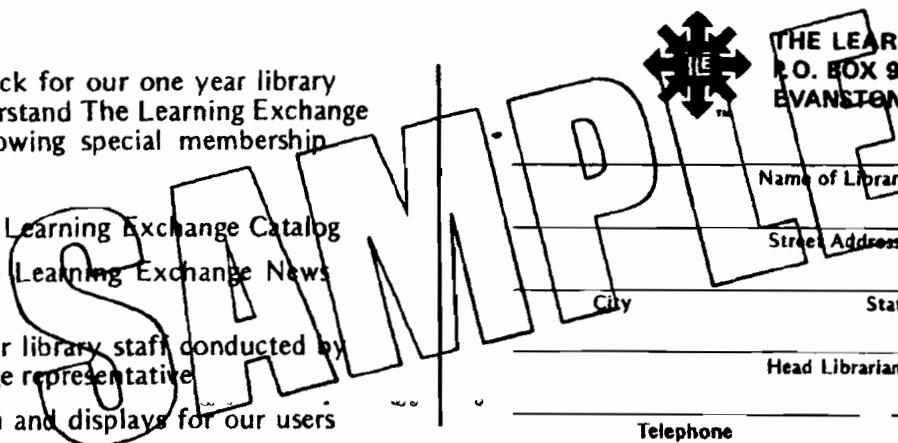
The Learning Exchange will provide printed materials you can offer your patrons explaining how they can expand their interests through The Learning Exchange

This special membership program is available to all libraries in metropolitan Chicago for \$35 per year.

LIBRARY MEMBERSHIP APPLICATION

Enclosed is a \$35 check for our one year library membership. We understand The Learning Exchange will provide the following special membership benefits:

- Five copies of The Learning Exchange Catalog
- Five copies of The Learning Exchange News published quarterly
- A workshop for our library staff conducted by a Learning Exchange representative
- Special information and displays for our users



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SAMPLE POSTER
GET INTO • PLAY • SHARE • LEARN • GIVE • PROBE

20,000 people and more than 2,500 activities are waiting for you !!

You can . . .

- learn Spanish
- play guitar
- find tennis partners
- organize classes
- fix your car
- refinish furniture
- learn to swim
- chart your stars
- be a teacher
- cook ethnic foods
- go sailing
- improve your skills
- camp outdoors
- make new friends
- fly a plane
- speak new languages
- find a tutor
- work with wood
- discover literature
- get into photography
- play piano
- write poetry
- paint a portrait
- balance your books
- make jewelry
- practice your French
- form an action group
- find bridge partners
- answer questions
- play the harmonica
- grow healthier plants
- learn German
- earn extra money
- meet people
- learn to sing
- philosophize

- explore psychic healing
- study history
- pluck a banjo
- discover Tai Chi
- discuss the Bible
- play violin
- ride a unicycle
- analyze your handwriting
- discover bio-feedback
- get into meditation
- have fun with radio
- be a clown
- examine alternatives
- get travel tips
- quilt a comforter
- sculpt a bust
- crochet a scarf
- discuss a book
- ride a horse
- weave a basket
- tie-dye a shirt
- build a boat
- throw a pot
- repair your own TV
- draw in charcoal
- share your skills
- teach someone English
- write a book
- train your dog
- knit a sweater
- start a business
- needlepoint a picture
- bake your own bread
- learn a computer language
- play backgammon
- learn electronics

- explore education
- macrame a plant hanger
- find partners for games
- collect antiques
- ride a bike
- play chess
- fix your Bug
- silk-screen a poster
- sew your own clothes
- make a rag
- learn secretarial skills
- play handball
- take up skiing
- learn for less
- play an organ
- get into music
- join a jam session
- play a recorder

- sing songs
- improve your voice
- learn to speak Arabic
- do magic tricks
- learn karate
- play the sax
- prepare for GED
- strum a dulcimer
- read Tarot cards
- speak Italian
- practice Yoga
- get into real estate
- learn sign language
- share your thoughts
- plant a garden
- get involved
- and much more!



The Learning Exchange™

Call for FREE information

273-3383

9-9 Mon-Fri, 9-5 Sat

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TUTOR • INFORM • BECOME • DISCUSS • CONTACT

• ORGANIZE • TEACH • CREATE • EXPLORE • DISCOVER • BE • ENJOY •

SAMPLE BOOKMARK

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GAMES

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30,000 NEIGHBORS

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LEARNING
EXCHANGE™**

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Catalog and Newsletter.

See p. 38

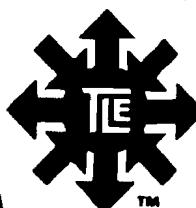
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YOU CAN LEARN, TEACH, OR MEET PEOPLE WHO SHARE YOUR INTEREST IN MORE THAN
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and
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BACK

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for your educational and recreational enjoyment

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From virtually every neighborhood in the city and suburbs of Chicago, people of all ages are benefiting from this unique service. You can, too!

OVER 3,000 SUBJECTS TO CHOOSE FROM!

We can put you in touch with people who want to teach, learn, or share an interest in languages, arts and crafts, sports and games, music, repair skills, academic subjects, hobbies—plus thousands of other stimulating, enriching activities.

Through The Learning Exchange, you can find:

Teachers . . . tutors . . . classes . . . experts who can answer your questions . . . speakers . . . PLUS: discussion groups . . . partners for games and sports . . . and people who enjoy the same hobby or topic as you!

Of course, if you have skills, talents, or knowledge you'd like to share with others, we can find you students and people who need their questions answered . . . but you don't have to offer to teach anything in order to use The Learning Exchange.

How is such variety and scope possible?

Since The Learning Exchange is a place you CALL, rather than go to, we can serve an unlimited number of people. And we can serve you no matter where you live in the Chicago area, since you meet where you want—even in the comfort of your own home! (Or, if you prefer, you can meet with others for your educational or recreational activities at your office, library, community center, church, park—at any place that's convenient and available to you.)

Furthermore, since our "classroom" is the entire metropolitan Chicago area, and since so many people are participating in the program, our "curriculum" is virtually unlimited. Just tell us what you want to do!

For FREE information, just call



273-3383

9-9 Mon.-Fri., 9-5 Sat.

or write: THE LEARNING EXCHANGE

Post Office Box 920

939 Hinman Avenue

Evanston, Illinois 60204

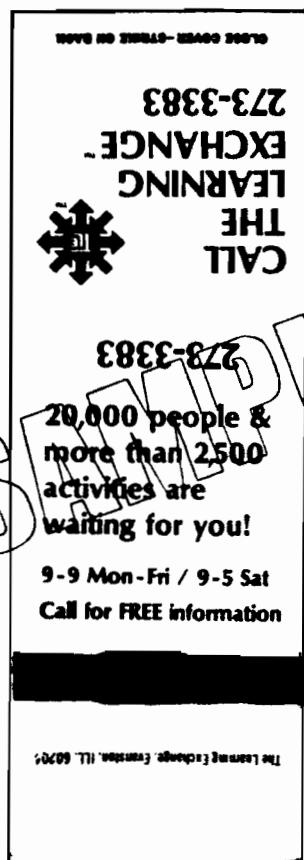
LOBBY DISPLAY



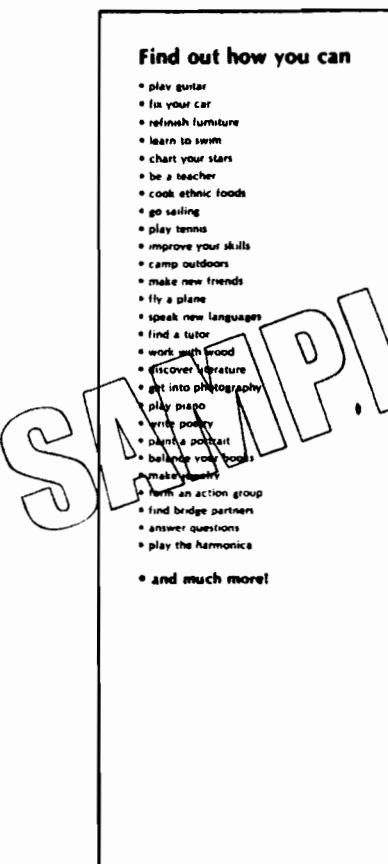
See pp. 38 and 40

SAMPLE MATCHBOOK COVER

OUTSIDE



INSIDE



See p. 42



COVER LETTER FOR CORPORATE MEMBERSHIP PROGRAM

The Learning Exchange™

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*American Hospital Supply
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Mike LaVelle
Chicago Tribune

Sherwin M. Levinson
*Standard Oil Company
(Indiana)*

Robert S. Mendelsohn
Michael Reese Hospital

Joe L. Parkin
*Bankers Life and
Casualty Company*

Gary H. Rieman
*Combined Insurance
Company of America*

Craig Sakurai
The Filmstrip House, Inc.

Joel Sebastian
WL TD-AM

Dear Corporate Manager,

I'd like to acquaint you with a service that involves thousands of Chicagoans who are sharing their interests, knowledge, skills, and talents. It's The Learning Exchange — a new concept in education based on an idea that has been around for a long time. People teaching people — on their own time — at their own pace — in their own homes, community centers, libraries, churches and offices.

People don't come to The Learning Exchange. They call us. They tell us what they'd like to learn, teach, or share an interest in. Then we match them up with someone in our files who fits the bill. The simplicity of the service enables us to connect people with other people, usually in the same neighborhood, to share their knowledge in over 2,500 subjects listed with The Learning Exchange.

In four years The Learning Exchange has grown from a few interested supporters to over 20,000 enthusiastic Chicagoans. In fact, the success and phenomenal growth of The Learning Exchange has encouraged other groups in major cities throughout the country to institute similar programs.

By simply presenting a way for people with matching needs and interests to get together, The Learning Exchange has helped channel the energies and skills of thousands in and around Chicago who needed something more than traditional educational institutions provide. At The Learning Exchange, the skills of the elderly and retired can be shared, special talents of people past "school age" can be put to use, and the learning needs of young people can be met on a personal basis with individualized tutoring.

Due to the success of The Learning Exchange, we are now able to reach out to involve more people in the service. We have taken advantage of public service advertising offered to us through television, radio and various publications. We have offered voluntary memberships to our participants, so that users can actively support the organization with an optional contribution. And recently we have been telling The Learning Exchange story to corporations.

The Learning Exchange's Corporate Membership Program is designed to serve participating corporations, their employees, retirees, and families. We believe you can benefit from this new program in many ways. Please read the following pages describing the Corporate Membership Program. If you have any questions, I would welcome the opportunity to answer them.

Cordially,

Bob Lewis

G. Robert Lewis
Director of Public Affairs

See pp. 39 and 40

How to Use It

When The Learning Exchange was established in 1971, it was meant to provide an alternative to traditional schools, in which structured group emphasis, limited curricula, inconvenient locations, requirements and often high tuitions created a learning barrier for many Chicagoans. As an educational service, The Learning Exchange is offered at no charge to every person in Greater Chicago regardless of age, race, educational background or socioeconomic status. The absence of restraining factors in The Learning Exchange has encouraged people to become involved in areas that otherwise might be unavailable to them.

Instead of relying on governmental funding to support this not-for-profit service, we ask the people using the service to support The Learning Exchange through a voluntary membership program similar to that of WTTW-TV (Channel 11). The referral service is always free of charge to anyone who wants to use it. But all registrants are invited to become Regular Members at \$15 a year or Senior Citizen Members at \$7.50. Supporting members receive the following benefits in addition to the basic telephone information service:

1. Annual Catalog of Topic Listings
2. Quarterly Newsletters
3. Free classified ads in Newsletter
4. Members-Only Phone Number
5. Membership Card

Group Members receive the same benefits as the Regular Members do. Any cost to them is determined by the particular Corporate Membership Plan that the company chooses. (See colored sheets.)

We can help create awareness and interest

No matter which Corporate Membership Plan you choose for your company and its employees, The Learning Exchange will make every effort to make sure you gain as much as possible from the service. We will consult your corporation's advertising agency, public relations personnel, or employee benefits department to determine the best methods of creating awareness and interest in The Learning Exchange among your employees. These methods could include:

1. A slide or video tape presentation describing The Learning Exchange and showing how various members of the community have been able to use and benefit from it.
2. Complimentary guest speakers from The Learning Exchange to discuss the service and conduct a question and answer session.
3. A letter from the president or immediate superior of the company along with supplementary materials from The Learning Exchange.
4. An article in your corporate newsletter or a regular column devoted to recognizing employees participating in the service.
5. Leaflets included in paycheck envelopes.
6. Stand-up lobby displays.
7. Posters for bulletin boards.
8. Counter-top displays with "take-one" information.

Each of the above communication techniques will be provided and/or conducted by The Learning Exchange at any time convenient to you and your employees.

In addition, every participating employee will receive a catalog of subject listings and all other membership benefits including: membership card, members-only phone number, quarterly newsletters, which contain topic update, the members' bulletin board, and feature articles about Learning Exchange members.

Corporate Membership — Plan A

**For corporations with
500–1,000 employees in Greater Chicago**

Option 1 – \$500 Corporate Membership

All corporate employees who wish to participate can receive The Learning Exchange membership benefits at a special rate of \$10.00 instead of the regular \$15.00. Retirees may join at the regular senior citizen rate of \$7.50.

Option 2 – \$1,500 Corporate Membership

All corporate employees and retirees who wish to participate can receive The Learning Exchange membership benefits at a special rate of \$5.00.

Option 3 – \$2,500 Corporate Membership

All corporate employees and retirees who wish to participate can receive The Learning Exchange membership benefits at no charge.

See pp. 39 and 40

Corporate Membership — Plan B

**For corporations with
1,000—3,000 employees in Greater Chicago**

Option 1 — \$1,000 Corporate Membership

All corporate employees who wish to participate can receive The Learning Exchange membership benefits at a special rate of \$10.00 instead of the regular \$15.00. Retirees may join at the regular senior citizen rate of \$7.50.

, Option 2 — \$3,000 Corporate Membership

All corporate employees and retirees who wish to participate can receive The Learning Exchange membership benefits at a special rate of \$5.00.

Option 3 — \$5,000 Corporate Membership

All corporate employees and retirees who wish to participate can receive The Learning Exchange membership benefits at no charge.

Corporate Membership — Plan C

For corporations with
3,000–5,000* employees in Greater Chicago

Option 1 – \$2,000 Corporate Membership

All corporate employees who wish to participate can receive The Learning Exchange membership benefits at a special rate of \$10.00 instead of the regular \$15.00. Retirees may join at the regular senior citizen rate of \$7.50.

Option 2 – \$6,000 Corporate Membership

All corporate employees and retirees who wish to participate can receive The Learning Exchange membership benefits at a special rate of \$5.00.

Option 3 – \$10,000 Corporate Membership

All corporate employees and retirees who wish to participate can receive The Learning Exchange membership benefits at no charge.

**Plans for corporations having under 500 or over 5,000 employees in Greater Chicago will be arranged on an individual basis.*

See pp. 42 and 43

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•START•RECEIVE•GROW•SUCCEED•ENJOY•DISCOVER•SHARE•CONTACT•FIND•REFRESH•TUTOR•LOCATE•FIX•RENEW•GET•ENRICH•
•CREATE•TRY•SPEAK•AID•INFORM•BUILD•EXPLORE•MEET•BENEFIT•LEARN•REAWAKEN•PROBE•DISCUSS•JOIN•IMPROVE•TEACH•
**30,000 people & THE
3,000 activities LEARNING
are waiting EXCHANGETM
for YOU! ☀ 273-3383**

SAMPLE TRANSIT AD



INTRODUCTORY FUND RAISING LETTER

The Learning ExchangeTM

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The Learning Exchange

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The Lyon Partners, Inc.

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Abbott Hospital and Medical Center

Joe L. Parkin
State Life and Casualty Company

Gary H. Rieman
Illinois State Scholarship Commission

Craig Sakurai
F/Stop Inc.

Joel Sebastian

Dear _____:

We have found a way to tap the unused and underutilized human resources of Greater Chicago; and because of your demonstrated interest in innovative education, we thought you would like to know more about our program.

The Learning Exchange is a large educational network of more than 30,000 community residents who are registered to teach, learn, and share interests with other people in and around their neighborhoods. The organizational focal point of the network is The Learning Exchange office which houses a computerized input/retrieval/storage system, a bank of telephones, and a corp of twenty full and part-time staff members whose task it is to match community residents on the basis of similar or complementary educational interests. After matching, participants assume the responsibility of creating their own tutorial sessions, classes, and workshops at mutually convenient times and places. (The enclosed materials describe more thoroughly how the program works and how Chicago area residents have been benefiting from our new approach to community education.)

During the coming years, The Learning Exchange plans to expand the scope of its programs as well as serve additional tens of thousands of Chicago area residents.

In view of your commitment to the improvement of educational systems, I would welcome the opportunity to meet with you briefly to discuss our progress, plans, and needs in more detail.

On _____, I will telephone you so we can arrange a meeting time that is convenient for you.

Sincerely yours,

See p. 51



COVER LETTER FOR LIBRARY INTERFACE PROPOSAL

The Learning ExchangeTM

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Chicago Tribune

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Ambassador of the United States to Norway

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Robert R. McClaren
North Suburban Library System

Robert S. Mendelsohn
Michael Reese Hospital and Medical Center

Joe L. Parkin
Bankers Life and Casualty Company

Gary H. Rieman
Illinois State Scholarship Commission

Craig Sakurai
F/Stop Inc.

Joel Sebastian

Dear _____:

The Learning Exchange is requesting a \$10,500 grant from the _____ Foundation for the purpose of developing a formal resource-sharing relationship between our service and 15 area libraries.

The grant would fund an initial, six-month pilot program, which we believe will generate sufficient funds to ensure its continuation and expansion in the following months. The enclosed proposal outlines more specifically our goals and expectations for the program.

The development of a formal Learning Exchange/library-system relationship is both a natural next step for our service and an exciting prospect for the communities of the Chicago area. Our success over the past four years in collecting resource information, and making it available to Chicago area residents has been encouraging. By working with Chicago area libraries, we can expand our service dramatically in both quantity and quality.

We hope that _____ Foundation will choose to become a part of this project and help us serve more Chicago area residents in more ways. Should you have any questions about the proposed program, please don't hesitate to call me.

Thank you for your time and consideration in this matter.

Sincerely yours,

G. Robert Lewis
Director of Public Affairs

See p. 54

FUND RAISING PROPOSAL (1st of 4 Pages)

Six Month Pilot Project: The Learning Exchange/Public Library Interface

Introduction

The Learning Exchange is a not-for-profit, creative educational service, designed to meet the educational needs of individuals and communities throughout the entire Chicago metropolitan area. The program was conceived and begun in 1971 as an alternative to the traditional, structured school, overloaded, then as now, with the growing demands of urban education.

The Learning Exchange was established to prove that teaching and learning need not be confined to expensive, crowded, and increasingly depersonalized public schools; that education is a continuing human process, as vital to the middle-aged and elderly as it is to the young; and that sadly under-utilized community resources can be marshalled, cataloged, and shared, simply and inexpensively.

The mechanism used by The Learning Exchange to accomplish its objectives is telephone resource referral. Chicago area residents, of any age, social or economic background, register by phone their needs, talents, and skills. Through a simple and effective card-file and geographical-coding system, the needs and resources are cataloged and made available to anyone calling The Learning Exchange. There is no fee for the service. Approximately 30% of the teacher-registrants share their skills without charge, so people calling The Learning Exchange can frequently learn a skill or find the resource they need with no cost at all to themselves.

The Learning Exchange provides the connection between people all over the city who need and can share information, skills, and interests. All teaching and learning arrangements are decided by the participants, and not by The Learning Exchange. Callers determine with whom to meet, when, where, how long, and the nature of any fee involved.

Impact

Public response to The Learning Exchange has been enthusiastic, and it continues to grow. Community support -- both financial and in the form of donated resources and time -- has been very strong. In four years, The Learning Exchange has helped more than 29,000 community residents find teachers, students, resources, and people with whom to pursue their interests. The service has been instrumental in establishing over 3,000 classes, discussion groups, tutorial sessions, and recreational activities. The Learning Exchange currently has registered more than 2,200 subjects, which callers want to teach, learn, discuss, or pursue. The topic list encompasses a wide variety. In addition to academic tutoring, the most popular subject areas on file include foreign languages, musical instruction, arts and crafts, and manual repair skills.

See pp. 38 and 54

Organization

The work of The Learning Exchange is accomplished on an annual operating budget of \$65,000. The program was initiated in 1971 by a group of Northwestern University students. With an operating budget of \$250, using volunteer help and a borrowed Evanston office, six students handled the requests of approximately 1,000 callers during the first year. After incorporating as a tax-exempt organization in 1972, The Learning Exchange served approximately 5,000 Chicago area residents. The number of Learning Exchange callers jumped to 13,000 the next year, and is expected to exceed 20,000 in 1975. The service now employs four full-time workers and six part-time telephone counselors, and is financially supported primarily by callers, through a voluntary membership program, which accounts for 75% of the budget. Full self-support is projected for Spring 1976, though currently the 25% of budget needs not supplied by membership contributions are made up by corporate contributions.

Purpose of Request

The major goal of establishing a stable and workable service has been accomplished, and full self-support through membership contributions will ensure the continued success and independence of the organization. But the vitality of The Learning Exchange as a community service has yet to be fully realized. The coming years will see the growth of The Learning Exchange as a complement to more traditional educational services, such as public schools and libraries.

In 1976, The Learning Exchange plans to initiate and test a major developmental project, designed to create and sustain a formal relationship between The Learning Exchange and Chicago area libraries. This project is a natural next step for The Learning Exchange: the service functions in much the same way as a library, with resource collection, cataloging, and availability to the public; and both libraries and The Learning Exchange serve community members who are already highly motivated to learn more and to share what they know.

The Learning Exchange envisions a six-month pilot program, which will target on 15 area libraries, establish and sustain a formal resource/client referral relationship, and monitor and evaluate the effectiveness of the project, at a cost of \$10,500.

The pilot program will focus on three major goals:

- 1) to inform the clients of 15 area libraries about The Learning Exchange, and about specific ways it can help them find the resources and people they need to succeed in and expand their self-education efforts;
- 2) to acquaint library employees with the services of The Learning Exchange, and to encourage their use of the service, both privately, and in their work with library clients; and
- 3) to assist The Learning Exchange's self-support program, through the increased exposure and use established through the library relationship.

Implementation of Pilot Project

The target libraries would be chosen from geographic areas where public response to The Learning Exchange has been strong. In these libraries, specially designed promotional materials would be made available to library clients. These materials will be aimed at encouraging library-goers to call The Learning Exchange if they wish to teach, learn, or share a skill or interest, or if they wish to use the resources of the service to organize community action groups or cooperative neighborhood projects, as other Learning Exchange participants have done over the years.

A promotional campaign for each participating library would be implemented and sustained over the six-month period, and would include regular visits from a Learning Exchange program coordinator, use of The Learning Exchange's slide show, and regular consultation with library employees as to how best to reach and serve their clientele. These materials, and the project as a whole, will focus on complementing and supplementing the efforts of participating libraries. Contact with The Learning Exchange will make numerous new resource tools available to libraries and their clients, adding to their current listings of books, records, and periodicals, experts and interested individuals in Chicago's communities who can provide help and guidance in thousands of research and recreational areas.

The promotional materials would include full-scale lobby displays, counter displays with postage-paid pre-registration materials, posters, and possibly a "Learning Exchange Bulletin Board," listing specific needs and offerings of the service. The "Bulletin Board" will serve as an additional method for evening the "supply and demand" problem of a given community.. If The Learning Exchange has, or needs, resource people in the participating library's neighborhood, these needs and offerings can be posted, and library-goers will have the information immediately available to them. In addition, special materials for the use of librarians would be designed, printed, and distributed to participating libraries.

Evaluation and Expansion

The program would be monitored throughout and ultimately evaluated on the basis of the number of people served, the ways they chose to make use of The Learning Exchange's services, the effectiveness of the promotional materials involved, and an analysis of the cost of the entire pilot program. The pilot program will run for six months only, and is expected to generate sufficient funds to permit its continuation and expansion in the months following.

Contingent upon the success of the pilot program in terms of the above criteria, The Learning Exchange will establish, over a period of time, similar relationships with the remaining Chicago area libraries. If successful, the six-month pilot program will lead to a significant increase in The Learning Exchange's users and members, and will establish an unprecedented resource-sharing relationship between the service and traditional Chicago area educational institutions.

FUND RAISING PROPOSAL (4th Page)

Six-Month Budget

The proposed budget of \$10,500 for six months is broken down as follows:

Coordinator	\$5,000
Consultation (material design)	1,000
Printing (promotional materials)	4,000
Transportation	500
<hr/>	
TOTAL	\$10,500

We hope that the will choose to become a part of this new aspect of The Learning Exchange's development. Thank you for your time and consideration in this matter.



COVER LETTER FOR "PART-TIME STAFF" FUND RAISING PROPOSAL

The Learning ExchangeTM

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David J. Christensen
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Chicago Tribune

Louis A. Lerner
*Ambassador of the United States
to Norway*

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Standard Oil Company

Robert R. McClaren
North Suburban Library System

Robert S. Mendelsohn
Mayo Clinic Hospital and Medical Center

Joe L. Parkin
Bankers Life and Casualty Company

Gary H. Rieman
Illinois State Scholarship Commission

Craig Sakurai
F/Stop Inc.

Joel Sebastian

Dear _____:

Enclosed is a grant request for \$2,500 to enable The Learning Exchange to hire one part-time telephone resource counselor in 1977. This staff member is needed to help handle the increasing demand for the kind of educational and recreational services The Learning Exchange is providing the people of metropolitan Chicago.

An intensified media publicity program coupled with the success of the Library Membership Program is expected to increase substantially the number of people using the services of The Learning Exchange. Based on current usage and growth patterns, we anticipate serving approximately 30,000 callers in 1977.

In order to provide our clients with a quality service and meet their educational needs, we hope the _____ Foundation will look favorably upon our grant request. As you will note in the enclosed document, your \$2,500 contribution to The Learning Exchange will enable us to serve an estimated 5,000 participants.

If you have any questions about our grant request or if you need additional information, please don't hesitate to call me.

Thank you for your interest and support.

Best wishes.

Sincerely yours,

See p. 54

THE LEARNING EXCHANGE

Introduction

Founded in May 1971, The Learning Exchange (TLE) has become the largest and most diversified community-based educational program in the country. So far, over 40,000 Chicago area residents have used the services of TLE and have registered more than 3,000 subjects they wish to teach, learn, or discuss.

Based on the simple principle of telephone referral, people who want to teach, learn, or share their interests call TLE and indicate their educational and recreational needs and/or talents. This information is recorded, categorized, and stored in TLE information bank. The telephone resource counselors at TLE then use this information to refer teachers to learners and learners to teachers. People with similar educational and recreational interests are referred to each other. After referral, participants create their own learning arrangements according to their own needs, abilities, and convenience. They determine when and where to meet, length of meeting, materials to be used, and whether or not there will be a fee.

Statement of Purpose

TLE was established to accomplish four major objectives:

- 1) develop an economical and efficient vehicle to collect, organize, and make accessible information about educational/recreational resources and needs in metropolitan Chicago;
- 2) encourage individual citizens to assume the responsibility to teach, learn, or share their interests with others;
- 3) assist public and private institutions in the development of their educational/recreational programs; and
- 4) offer to other cities a working example of how the educational/recreational resources of a metropolitan area can be better utilized.

Progress of The Learning Exchange

Since 1971, TLE has helped the people of metropolitan Chicago initiate over 5,000 classes, discussion groups, tutorial sessions, and recreational activities. Participants are using the service to get individual help in preparing for GED and CLEP examinations, college students are finding tutors for academic subjects, people with esoteric educational interests are using the referral services of TLE to fill the gap created by the limited offerings of more structured educational

FUND RAISING PROPOSAL (2nd Page)

systems, handicapped people and senior citizens who cannot attend formal classes are finding teachers willing to visit their homes, and students whose programs permit independent studies are identifying people outside the university willing to help them in their special interest area. Feedback from users of the service indicates that approximately 97% of the learners who meet with TLE teachers are satisfied with the instruction they receive.

The attached TLE catalog (prepared with the help of the Reader's Digest) indicates the wide range of interests that have been registered by participants. In addition to academic tutoring, the most popular subject categories include foreign languages, arts and crafts, musical instruments, and manual repair skills. The attached copies of The Learning Exchange News and other newspaper and magazine articles provide some specific examples of how individual people in metropolitan Chicago are benefiting from the services of TLE.

Since November 1975, WTTW-TV has been playing an active role in informing people about the educational services of TLE. On a daily basis, Channel 11 airs one or more of sixteen TLE 30-second public service announcements. Also, the Public Affairs Department of WBBM-TV recently videotaped a professionally prepared 30-second public service announcement for TLE. Copies of the announcement have been distributed to all the television stations serving metropolitan Chicago. Public service directors at the respective stations have been extremely cooperative and supportive of the work of TLE and, as a result, the announcements are being aired on all stations.

Perhaps the most noteworthy development at TLE in recent months has been the successful implementation of its Library Membership Program. Through the support of special project contributions from the Continental Bank Foundation, McDonald's Corporation, Borg-Warner Foundation, Quaker Oats Company, Signode Corporation, and Carson, Pirie, Scott and Company, this new phase of TLE program expands its services not only to more Chicago area library-goers but also to library staff members. For an annual membership contribution of \$35, member libraries receive multiple copies of TLE catalog, quarterly newsletters, promotional materials for their clients, and a workshop for librarians outlining the variety of ways they can use the services of TLE to better serve their clients. Of 45 public libraries contacted about the program so far, 22 have already become contributing members and are actively participating in this pilot project. The Library Membership Program has much room for expansion since there are over 180 public libraries in the Chicago area.

During the past few years TLE has been striving to find ways for participants to help support the service. Recognizing that not everyone can afford to contribute an equal amount and, indeed, that those most in need of the service may be least able to afford it, TLE initiated a voluntary membership program similar to WTTW's in May 1974. This internal fund raising program has been successful in helping to

FUND RAISING PROPOSAL (3rd Page)

finance the free educational services of TLE. In 1974 25% (\$11,000) of a \$43,000 operating budget was covered by voluntary members, in 1975 59% (\$32,000) of a \$56,000 operating budget was covered by the membership program, and in 1976 it is projected that approximately 65% (\$56,000) of an \$86,000 budget will be covered by client donations. (See chart on page 8.)

Even though TLE has not attained a full self-supporting status, its progress has been steady and consistent. This indicates that the people of metropolitan Chicago are willing to support TLE even though they can use the service free.

Finally, TLE is having a significant educational impact on a national level. Following the example of Chicago's prototype, independent groups in eleven other cities have established services similar to TLE in their communities. Ten more programs are on the drawing boards. Articles in Time, The Wall Street Journal, Reader's Digest, Psychology Today (copies enclosed), and a recent Learning Exchange interview on NBC's "Today Show" are helping to further the proliferation of this new approach to community education. By the end of this decade it is projected that approximately 50 independent projects based on TLE model will be in operation around the country.

Goals of The Learning Exchange for 1977

TLE has four operating goals for 1977:

- 1) Increase the number of callers served per month from the current 1,500 to an average of 2,500;
- 2) Expand the Library Membership Program so that over 50% of the libraries in metropolitan Chicago become institutional members of TLE;
- 3) Raise 70% (\$80,000) of a \$115,000 projected operating budget from client memberships; and
- 4) Raise \$35,000 in corporate and foundation contributions.

The major thrust for 1977 will be to generate more publicity (through the media and libraries) so that more Chicago area residents can be served, and served better. Due to the nature of the referral services provided by TLE, more people using the service results in a more effective service - the more participants, the more options, the greater the likelihood that clients will find other people close to their homes having similar or complementary educational interests.

Statement of the Problem

The problem, in a word, is success. Because of the increasing public awareness of the service and its exponential growth (in terms of new participants as well as frequency of use by present participants), a

FUND RAISING PROPOSAL (4th Page)

strain is being placed on the limited financial resources of TLE. In order for TLE to continue providing its educational services free of charge to people who cannot afford to become supporting members, TLE needs the support of Chicago area's business community.

TLE expects to serve 30,000 people in 1977. To provide them with a high quality service, an operating budget of \$115,000 is projected. Approximately \$35,000 of this amount must be raised externally.

TLE is asking the _____ to consider a \$2,500 grant to cover the cost of a part-time telephone resource counselor for 1977.

Based on current usage patterns, it is estimated that this one staff member, working an average of 20 hours per week and handling 5 clients per hour, will serve over 5,000 Chicago area residents. In terms of maximizing the impact of _____'s contribution dollars, your investment in TLE is not only cost-effective but it also will enable a large number of people to become actively involved in the constructive process of teaching, learning, and sharing their interests with other community residents.

Thank you for your interest and consideration.

FUND RAISING PROPOSAL (5th Page)

PROJECTED INCOME 1977

(1) Internal

Membership Renewals

Number of Current Members	5,000
Renewal Conversion Rate	X 40%
Number of Membership Renewals	<hr/>
Average Amount of Membership	2,000
Amount Raised thru Renewals	X \$13
	<hr/>
	\$26,000

New Members

New Callers in 1977	18,000
Membership Conversion Rate	X 20%
Number of New Members	<hr/>
Average Amount of Membership	3,600
Amount Raised thru New Members	X \$13
	<hr/>
	\$46,800

Library Members

92 Libraries at \$35 per Member	\$ 3,200
---------------------------------	----------

Miscellaneous

Speaking Engagements and Consultation	\$ 4,000
---------------------------------------	----------

<u>INTERNAL SUB-TOTAL</u>	\$80,000
---------------------------	----------

(2) External

<u>Foundation Grants</u>	\$25,000
--------------------------	----------

<u>Corporate Contributions</u>	<hr/> 10,000
--------------------------------	--------------

<u>EXTERNAL SUB-TOTAL</u>	\$35,000
---------------------------	----------

<u>TOTAL PROJECTED INCOME</u>	\$115,000
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FUND RAISING PROPOSAL (6th Page)

PROJECTED 1977 BUDGET

Executive Director	\$9,000
Director of Public Affairs	8,500
Director of Operations	8,500
Manager, Public Affairs	8,200
Manager, Community Relations	8,200
Administrative Assistant	8,200
Part-Time Staff	<u>20,000</u>
<u>Salary Sub-Total</u>	<u>70,600</u>
Artwork (Printed Materials)	3,000
Telephone	4,000
Printing (Catalog, newsletters, promotional info)	15,000
Advertising	400
Postage	10,000
Rent	1,500
Transportation	2,000
Office Supplies	3,000
Hospitalization	1,000
Photography	1,500
Insurance	1,000
Miscellaneous	<u>2,000</u>
	<u>TOTAL</u>
	<u>\$115,000</u>

FUND RAISING PROPOSAL (7th Page)

SUPPORTERS OF THE LEARNING EXCHANGE SINCE 1972

5,500 Participant Members	\$78,000
The Chicago Community Trust	25,000
Reader's Digest	20,000
CNA Financial Corporation	15,000
McDonald's Corporation	9,250
Quaker Oats Company	8,000
W. Clement and Jessie V. Stone Foundation	5,200
Allstate	5,000
Woods Charitable Fund, Inc.	5,000
Mr. Gaylord Donnelley	2,750
American Hospital Supply Corporation	2,200
Amoco Foundation	2,000
Borg-Warner	2,000
First National Bank of Chicago Foundation	2,000
Action	1,500
Mr. Denis Detzel	1,250
Continental Bank Foundation	1,000
Washington National Insurance Company	1,000
Sahara Coal Company, Inc.	1,000
Hugh M. Hefner Foundation	950
Lakeside Press	800
Equitable Life Assurance Company	500
IBM	500
Jewel Foundation	500
Odyssey Incorporated	500
Signode Corporation	500
Carson Pirie Scott and Company	300
Motorola Foundation	300
Helene Curtis Industries	250
Charles Levy Foundation	200

TOTAL \$192,450

(In July 1976, The Fund for the Improvement of Postsecondary Education (DHEW) awarded TLE a \$77,417 grant to convert the 3x5 index card information bank to a more efficient and effective data processing system. Budget items for this special project are not included in the core operating budget of TLE on the preceding page.)

SAMPLE FUND RAISING SUPPORT LETTER



625 NORTH MICHIGAN AVENUE CHICAGO ILLINOIS 60611 (312) 527-2170

WESTINGHOUSE BROADCASTING COMPANY INC



WBZ-WBZ-TV BOSTON
WINS NEW YORK
KYW-KYW-TV PHILADELPHIA
WJZ-TV BALTIMORE
KOKA-KOKA-TV PITTSBURGH
WOWO FT WAYNE
WIND CHICAGO
KPIX SAN FRANCISCO
KFWB LOS ANGELES

Dear _____:

I understand that you will soon be considering a grant request submitted by The Learning Exchange.

As an Advisory Board Member of The Learning Exchange, I want to let you know that I and a number of other people at WIND fully endorse The Learning Exchange's people-to-people approach to community education.

At a time when there is growing evidence of disenchantment and depersonalization within the institutionalized system of education, I think the work of the dedicated staff of The Learning Exchange is what is needed to help improve the quality of education in our metropolitan area.

In view of the fine effort put forth by The Learning Exchange over the past few years, I hope you are able to give their recent grant request your careful consideration.

Sincerely yours,

Dave Baum

See p. 54



SAMPLE FUND RAISING SUPPORT LETTER

WMAQ-TV5

NBC Television Stations Division
National Broadcasting Company, Inc

Merchandise Mart Plaza
Chicago, IL 60654 312-861-5555

Dear _____:

In the two years I have been co-host of "Chicago Camera", I have become acquainted with a variety of community groups and educational organizations. If I had to single out one organization that has demonstrated its commitment to improving the quality of education in metropolitan Chicago, it would be The Learning Exchange.

Through The Learning Exchange thousands of people have been able to teach, learn, and share their common interests in a way that no school or university has ever afforded them.

The present success of The Learning Exchange and their potential for developing the often dormant resources in our community are not only significant but exciting.

As an Advisory Board Member of The Learning Exchange, I encourage you to carefully consider their request for your assistance. I can't think of an organization more deserving of your support.

Sincerely yours,

Linda Alvarez
NewsCenter 5

See p. 54

SAMPLE FUND RAISING SUPPORT LETTER

THE
LYON
PARTNERS

INC.



222 W. ADAMS STREET
CHICAGO, ILLINOIS 60606
(312) 263-5624

An impressively high cost/benefit ratio can be found in The Learning Exchange, of which I have been a Director since 1972. As indicated in the proposal recently submitted to you by The Learning Exchange, a projected 30,000 people will be served in 1977 on a total operating budget of \$115,000. In fact, based on current usage patterns, we estimate that one resource counselor working 20 hours per week at \$2,500 per year can serve more than 5,000 callers per year.

Some of the ways in which The Learning Exchange keeps its costs down include:

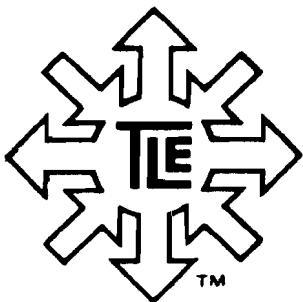
1. The Learning Exchange operates as a phone-in service, not a center to which its participants must go. This not only makes the service more convenient for its users and permits virtually unlimited service to the Chicago area, but also keeps overhead costs low.
2. Participants of The Learning Exchange meet in their own homes, offices, community centers, libraries, churches, parks -- at any place that's convenient and available to them. Learning Exchange users find this feature extremely attractive -- again, convenience for participants coupled with immense savings in overhead.
3. Participants also set up their own schedules, work with materials and methods they choose, and negotiate fee amounts and arrangements (if any). Staff members provide participants with information about teachers, tutors, classes, students, discussion groups, etc.; then participants contact and deal directly with each other.

Therefore, aside from the costs of telephones, printing, postage, supplies, etc. necessary to run the service, The Learning Exchange's greatest funding need is for PEOPLE -- people to serve people who are teaching and helping other people.

That's why I hope you decide to approve The Learning Exchange's request for funds to hire part-time resource counselors. Cost-conscious people will be investing your contribution, not just spending it.

Sincerely yours,

Harvey T. Lyon
President



The Learning Exchange

Post Office Box 920 • Evanston, Illinois 60204 • 273-3383

DIRECTORS

Chairman
John L. McKnight
Northwestern University

Vice Chairman
Denis H. Dertzel
McDonald's Corporation

Executive Director
Diane R. Kinishi
The Learning Exchange

Director
Harvey T. Lyon
The Lyon Partners, Inc.

Director
Thomas F. Roesser
The Quaker Oats Company

ADVISORS

John Q. Adams
WDHF-FM

Dave Baum
WIND-AM

Shel Beugen
WBMM-AM

Terry P. Brown
The Wall Street Journal

David J. Christensen
United Community Services

Eugene B. Colin
Marshall John and Associates

Charles Curry
The Quaker Oats Company

Sherry B. Goodman
WTTW-TV (Channel 11)

Hurley Green, Sr.
Independent Bulletin

Bob Hale

William R. Hazard
Northwestern University

James D. Houy
*American Hospital Supply
Corporation*

Mike LaVelle
Chicago Tribune

Sherwin M. Levinson
*Standard Oil Company
(Indiana)*

Robert S. Mendelsohn
Michael Reese Hospital

Joe L. Parkin
*Bankers Life and
Casualty Company*

Gary H. Rieman
*Combined Insurance
Company of America*

Craig Sakurai
The Filmstrip House, Inc.

Joel Sebastian
WL TD-AM

Dear Member,

If you're looking for a special gift idea for a special friend, neighbor, relative, co-worker or associate; if you'd like to give a present that's unique as well as valuable and practical, then you'll want to know about our new gift membership program.

A membership in The Learning Exchange is the perfect gift for the person who "has everything." There's nothing else like The Learning Exchange -- and a Learning Exchange membership is truly a distinctive gift. And who would not enjoy the opportunity to enrich their life by learning, sharing, growing, and meeting people?

It's an equally appropriate gift for the person, who like most of us, has far from "everything" -- for a Learning Exchange membership is the key to an exciting world of self-improvement and new friends.

Your friend "knows everything," you say? Give him or her the opportunity to share some of that knowledge with others -- and who knows, with over 2,500 subjects on file, they may even find something they don't know and would like to learn!

For the person who "never has time for anything" -- The Learning Exchange is a valuable time-saver. Many busy people -- executives, teachers, and housewives among them -- use The Learning Exchange because "it's so convenient" -- "I can find out just what I want to know without taking a whole course" -- "I can find people who can fit into my busy schedule" -- "It's like a human encyclopedia; I know that whenever I have a question about something, I can get it answered quickly and easily just by picking up the telephone" -- "It's so flexible."

We could go on and on -- but we think you'll agree that for the lonely, the outgoing, the young, the old -- for those seeking knowledge, tutors, companionship, a sense of worth -- for any family, single person, or couple -- you can't beat a Learning Exchange membership for a gift idea.

See p. 60

COVER LETTER FOR GIFT MEMBERSHIPS (2nd Page)

Your gift member will receive all the privileges and services offered by The Learning Exchange to its members for one year. And every time that person picks up the phone to call us, uses their new skill or delights in sharing their own knowledge with their students, gets together with the new friend they met through The Learning Exchange, receives their latest copy of our newsletter in the mail -- they'll think of you and thank you for your thoughtfulness.

And when you give a gift membership in The Learning Exchange, you're helping yourself, too. Because with each gift membership you give, you make the talents and interests of one more person available to you and others in our Greater Chicago community. And the more people who use The Learning Exchange, the better the service gets -- because you have more people, talents, and interests to choose from.

A Learning Exchange gift membership is a warm and thoughtful way to show you care, and what a convenient and easy way to do your gift shopping! Just fill out one of the enclosed Gift Membership Certificates for each person you want to give a gift membership to, send it to us with your check or money order and the enclosed application form, and we'll do the rest. We'll send the Gift Membership Certificate to the new member, along with their membership materials and information on using the service. And of course, each gift membership you give is tax-deductible to the extent allowed by law.

So spread some happiness with Learning Exchange gift memberships! You'll be giving a whole year's worth of stimulating learning and sharing opportunities and a chance to meet interesting, exciting new people. And it doesn't stop at the end of a year. For your "gift of people", will truly be a gift that keeps on giving.

With best wishes for a joyous holiday season and a New Year filled with health, happiness, learning and sharing,

Diane Reiko Finighan Gene Leffler Bob Lewis

Bar Otaviano Ed Demeyer

Sandy Rallhaar Jan Patter Mardi Swan

Scott McKnight Ophelia Semires

The staff of The Learning Exchange

GIFT MEMBERSHIP APPLICATION

GIFT MEMBERSHIP APPLICATION

YES! I want to spread some happiness with Learning Exchange Gift Memberships. Please send a Gift Membership to the person(s) indicated on the enclosed Gift Membership Certificates(s).

Enclosed is my contribution of \$ _____ for _____ Gift Membership(s) at \$15.00 each.

My Name _____

Address _____

City / State / Zip _____

Home Phone _____ Work Phone _____

Please remember to fill out and include one of the enclosed Gift Membership Certificates for each gift membership you wish to give. We will send the Gift Membership Certificate directly to the gift member along with their membership materials and information on using the service.

Thank you for your support. Your contribution is tax-deductible to the extent allowed by law.

GIFT MEMBERSHIP CERTIFICATE

The Learning Exchange takes great pleasure in announcing that

a one-year membership has been taken out in your name. This gift membership entitles you to a full year of all the privileges and services offered by The Learning Exchange to its members, which include: a catalog which lists more than 2,500 subjects registered by participants; a membership card; a special members' private phone number which makes it easier for you to reach us when our regular phone lines are busy; and a one-year subscription to The Learning Exchange News, our quarterly newsletter, which contains articles about what members are doing through the service, a "New Topics" section which updates the catalog, and a "Members' Bulletin Board" which gives members the opportunity to inform thousands of other members of their needs, offerings, and interests. You are also now entitled to use the listing and referral services of The Learning Exchange any time and as often as you like during our 60 hours of operation per week.

Name of Recipient _____

PLEASE PRINT

Address _____

City _____

State _____

Zip _____

Home Phone _____

Work Phone _____

This membership is a gift from Learning Exchange member _____

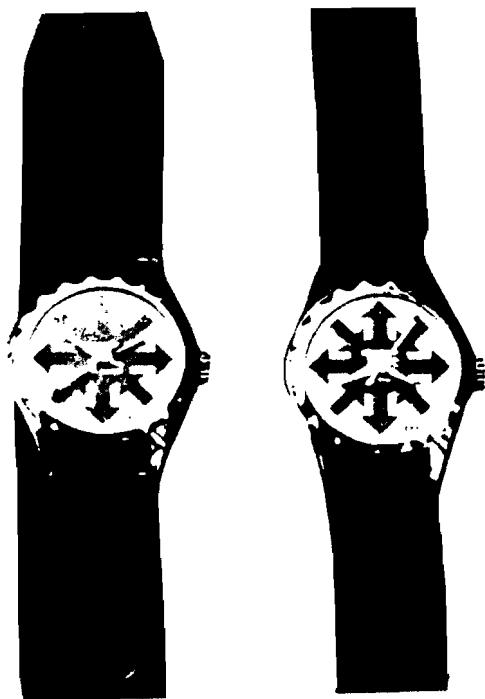
Special message, if any _____



Diane Peiko Kinighi
Executive Director
of The Learning Exchange

© 1981 THE LEARNING EXCHANGE

Learning Exchange Gift Ideas!



Watches!

These fine-quality, genuine Swiss-made watches feature luminous hands, sweep second hand, unbreakable mainspring, and of course, The Learning Exchange logo in red on white. A great conversation piece that's practical as well as attractive! (Why not treat yourself while you're at it?) Goldtone case with your choice of leather or navy blue nylon strap. \$14.95

Watches shown are approx. $\frac{3}{4}$ actual size.



T-shirts!

Here's a gift that will please your budget as well as the child or adult who receives it! Plus, you're helping spread the word about The Learning Exchange! Our popular T-shirt comes in navy blue, light blue, red, and yellow; sizes small, medium, large, extra large, and child (size 10-12). Machine washable. \$3.95 each, 3/\$10.00



Gift Memberships!

If you're looking for a special gift idea for an adult or child — family, single, or couple — a Gift Membership in The Learning Exchange is hard to beat.

A Learning Exchange Gift Membership is unique, yet practical — as well as valuable! It's equally ideal for the person who has "everything" — and for the person who could really use something like The Learning Exchange to get more out of life.

A Gift Membership is more than just a present for one person, too — it's a gift of support and talent to help improve the quality of life for all people in Greater Chicago, including yourself, through the educational and recreational services of The Learning Exchange. And as with your own membership and renewal contributions, Gift Memberships are tax-deductible to the extent allowed by law.

So why search through crowded stores — or just give cash as a present — when you can give a whole year's worth of stimulating learning and sharing opportunities and a chance to meet interesting, exciting new people?! This year, give the best gift of all: a "gift of people" that will truly keep on giving. \$15.00

**Just stop by our office
to get your Learning Exchange gift items!**

Supplies are limited on watches and T-shirts — please call before coming to confirm that we still have the item you want in stock.

**Or, if you prefer, just call in your order
and we'll do the rest.**

The Learning Exchange office is located on the second floor of the Parish House of St. Luke's Church, Lee St. and Hinman Ave., Evanston. Lee St. is one block north of Main St.; Hinman Ave. is one block east of Chicago Ave. Entrance to Parish House is at rear of courtyard which opens on Hinman Ave. (Two blocks from Main St. "el," C & NW, and bus stops.)

(PLEASE NOTE: As always, your requests for names of teachers, tutors, students, people who share your interests, etc. are more quickly and efficiently handled over the telephone than through a visit to our office.)

**"Go canoeing without our Learning Exchange T-shirts or tote bags?
NEVER!"**

Everyone can use a cool, comfortable Learning Exchange T-Shirt to wear during the summer. And a handy, durable Learning Exchange tote bag is just the thing to carry beach wear, books, crafts, lunches, or anything you tote around with you!



**ORDER YOUR T-SHIRT AND TOTE BAG FROM
THE LEARNING EXCHANGE TODAY!**

To order your Learning Exchange T-shirt(s) and/or tote bag(s) at \$3.95 each, just fill out this coupon and mail it with your check or money order to:

THE LEARNING EXCHANGE™ P.O. BOX 920, EVANSTON, ILLINOIS 60204

Please send me _____ T-shirt(s)

Size (S, M, L, X-L, Child Size 10-12)	Color (Sunny Yellow, Navy, Light Blue, Bright Red)

Enclosed is my check or money order for \$ _____

Name _____

Address _____

City _____

State _____ Zip _____

Please send me _____ Tote bag(s)

QUANTITY	COLOR
	Natural
	Light Blue
	Brown

See p. 60

Get Your Learning Exchange T-SHIRT!



Get into summer by getting into your very own Learning Exchange T-shirt! It's the perfect thing to wear while you're enjoying your favorite Learning Exchange activity—whether you bike, sail, play handball, or swing a tennis racket. You can wear it to a softball game . . . your pottery class . . . French lesson . . . while fixing your car . . . and even to formal occasions (under your shirt, of course!). Or just to bum around in!

Whatever you do in your Learning Exchange T-shirt, you'll be cool and comfortable in one of these all American-made, machine-washable/dryable silkscreened beauties. They come in sunny yellow, sky blue, and firecracker red, with a full range of sizes (small, medium, large, extra large, and child size 10-12). And they're great for family, friends, relatives, and anyone else to whom you'd give the shirt off your back!

When you wear your Learning Exchange T-shirt, you let the whole world know you're a member of one of the most exciting educational and recreational services around. In fact, you even *improve* the service for yourself and others in our Greater Chicago community, because you're helping to spread the word about The Learning Exchange. And as more people hear about, use, and join The Learning Exchange, the better the service gets.

So get into summer and fun with exciting new people and experiences—in your Learning Exchange T-shirt today!

To order, just fill out coupon and mail with your check or money order to:

The Learning Exchange, Post Office Box 920, Evanston, Illinois 60204.

While they last! Free Learning Exchange surprise with your order

Please send me _____ Learning Exchange T-shirts at \$3.95 each (3 shirts/\$10.00) in the size(s) and color(s) indicated below:

Size (S, M, L, X-L, Child Size 10-12)	Color (Sunny Yellow, Sky Blue, Firecracker Red)

Enclosed is my check or money order for \$_____

Name _____

Address _____

City _____

State _____ Zip _____

The Learning ExchangeTM

Post Office Box 920 • Evanston, Illinois 60204 • 273-3383



APPLICATION FOR EMPLOYMENT

Please PRINT all information.

FILL IN ALL BLANKS.

If you do not know a certain piece of information and are unable to find it by using our phone books and phones, please write "UNKNOWN" in that space.

If you do not wish to provide a certain piece of information, please write "CONFIDENTIAL" in that space.

If a question does not apply to you, please write "N/A" in that space.

Name _____ Home Phone _____

Address _____

City _____ State _____ Zip _____

Date of Birth _____ Age _____ Marital Status _____

How many persons, including yourself, depend entirely upon your income for their support? _____

I am interested in: Part-time: Permanent Temporary

Minimum number of hours desired per week: _____

Maximum number of hours desired per week: _____

Permanent full-time salaried position

Free-lance work

Check one: I am only interested in the following position(s)/type(s) of work. _____

I would like to be considered for any position for which I may be qualified. (I am especially interested in the following position(s)/type(s) of work: _____)

Which of the following are you able and willing to do?

Phone work Filing Typing: ____ /wpm accurate Shorthand: ____ /wpm Bookkeeping

Addressing Envelope stuffing

Graphics: Design Layout Paste-up Artwork

Photography (shooting): Black and white prints Color slides

Writing: Business letters Promotional materials Newsletter articles Proposals

Other types of writing: _____

Are you fluent in any foreign language? Yes No If so, please indicate which one(s) _____

Do you have any other skills not indicated above which may be helpful for us to know about? Yes No
If so, please indicate them here: _____

Do you have a car? Yes No

During which of the following hours are you available for work?

(Put an "X" in the appropriate box in the table at the right for each hour you are available.)

How soon could you start? _____

Referred by _____

Mon	Tues	Wed	Thur	Fri	Sat
9 a.m. - 10 a.m.					
10 a.m. - 11 a.m.					
11 a.m. - 12 noon					
12 noon - 1 p.m.					
1 p.m. - 2 p.m.					
2 p.m. - 3 p.m.					
3 p.m. - 4 p.m.					
4 p.m. - 5 p.m.					
5 p.m. - 6 p.m.					
6 p.m. - 7 p.m.					
7 p.m. - 8 p.m.					
8 p.m. - 9 p.m.					

Today's date _____ Signature _____

If you have any special reason(s) for wanting to work at The Learning Exchange, or if you have any special feelings about our organization, please feel free to note them below.

APPLICATION FOR EMPLOYMENT (2nd Page)

WORK EXPERIENCE (list last or current job first)

Employer _____ Phone _____

Address _____

City _____ State _____ Zip _____

Position _____

Hours worked per week _____ Approximate hourly wage (or monthly salary if job was full-time salaried position) _____

Description of responsibilities _____

Employed from _____ to _____ (If still employed at this job, write "STILL EMPLOYED")
month year month year

How long at this job: _____ year(s) _____ month(s)

Do you plan to retain this job while working at The Learning Exchange? Yes No

Reason for leaving: _____
(If you plan to retain this job while working at The Learning Exchange, please give reason for seeking additional employment with The Learning Exchange)

Employer _____ Phone _____

Address _____

City _____ State _____ Zip _____

Position _____

Hours worked per week _____ Approximate hourly wage (or monthly salary if job was full-time salaried position) _____

Description of responsibilities _____

Employed from _____ to _____ (If still employed at this job, write "STILL EMPLOYED")
month year month year

How long at this job: _____ year(s) _____ month(s)

Do you plan to retain this job while working at The Learning Exchange? Yes No

Reason for leaving: _____
(If you plan to retain this job while working at The Learning Exchange, please give reason for seeking additional employment with The Learning Exchange)

Other employment (list type of work done) _____

Non-paid work experience (volunteer, relevant outside or extra-curricular activities, etc.) _____

May we contact current/former employers? _____

REFERENCES (other than people whose only relationship to you is as a friend or relative)

Name _____

Occupation _____

Address _____

City _____ State _____ Zip _____

Home Phone _____ Work Phone _____

Relationship _____

Name _____

Occupation _____

Address _____

City _____ State _____ Zip _____

Home Phone _____ Work Phone _____

Relationship _____

STAFF MEETING REPORT (1st of 3 Pages)

Staff Meeting

Tuesday, 2/22/77

Diane Kinishi

WORK ACCOMPLISHED since last Staff Meeting Thursday, 2/10/77

Reviewed applications of/gave typing tests to/interviewed several key entry applicants resulting from Evanston Review ads and sources mentioned below.

Contacted and placed listings re: key entry at: N.U. Placement Office, ETHS Vocational Experience Program, ETHS Student Employment, National College of Education, Kendall College, Sawyer Secretarial School, Loyola U. Placement Office, and Roosevelt U. Placement Office.

Looked into two temporary employment agencies, Stivers Lifesavers Inc. and Kelly Services, for possible key entry assistance. (Details to be shared at meeting. Basically they're outrageously expensive and Kelly would even make us pay more for someone after we provide them with training.)

Worked with/supervised Pam Catoire on key entry.

Met with and talked with Sherwin several times re: key entry, coding, systems, timeshare service, etc.

Discussed problems about Stuart's photography (quality, ownership, re-shooting, etc.) with Dennis, Ken Oefelein, and Gary Rieman.

Discussed problems with DeKalb (trademark violation) with Marshall Sutker (trademark attorney) and Gary Rieman (attorney and Advisory Board member) over telephone; met with Marshall; edited/typed his suggested letters to DeKalb and NIU; sent them after showing them to Denis Detzel for his approval and support.

Attended fund raising luncheon for Milt Kotler with Dennis; had the opportunity to meet some past (and potential?) funders.

Talked with copier sales representatives over phone; met with and attended demos given by representatives of Toshiba (here), Dennison (downtown), and Savin (here) with Ed.

Met with Dianne Sauter of the Educational Resources Center with Dennis.

Attended Kathleen's presentation at the library district meeting held at S. Shore Library and her workshop for library staff at S. Shore Library; discussed and "critiqued" both with her.

Checked payroll, bills, taxes, and deposits that Ed and Teri did; wrote instructions for final check of deposits and completely entrusted that function to Teri and Ed.

DATE DUE

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PERSISTENCE

Nothing in the world can take the place of persistence

- Talent will not; nothing is more common than unsuccessful men with talent.
- Genius will not; unrewarded genius is almost a proverb.
- Education will not; the world is full of educated derelicts.

Persistence and determination alone are omnipotent. The slogan "Press On" has solved and always will solve the problems of the human race.

Arthur Rubloff's Persistence Plaque

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