

# Edward F. Swenson & Associates

*Management and Fund-Raising Counsel for Non-Profit Organizations*

3030 West Queen Lane  
Philadelphia, Pennsylvania 19129  
Telephone: 215-842-1748  
Facsimile: 215-842-1751

20 January 1997

George Gorbner, Ph.D.  
Cultural Environment Movement  
3508 Market Street  
Philadelphia, PA 19104

Dear George,

The enclosed letter serves as a draft contract between Edward F. Swenson & Associates (EFS) and the Cultural Environmental Movement (CEM). Please feel free to call with questions and modifications.

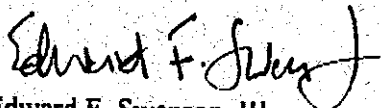
EFS is a fund-raising and management consulting firm. Our mission with CEM is to rapidly identify and attract funding for its general operations and program priorities.

EFS proposes a contract divided into discrete fund raising steps. Each step has an assigned level of effort and cost. EFS would bill when work products were completed and would proceed to new work products only after approval from CEM. This arrangement should keep the project on schedule with the least financial risk to all parties.

Before fund raising can occur, CEM needs to select and develop detailed descriptions for the programs it wishes to fund. EFS can assist with program development but prefers to recommend that CEM retain Renee Chcrow O'Leary. Renee's talents and knowledge of CEM would be very helpful. Please let us know how you wish to proceed. If you elect to retain Renee, she would have to agree to a scope of work and arrange her own compensation with you. Note, we have not talked with Renee about her availability.

Jennifer and I look forward very much to working with you, Kate, Renee and other CEM members.

Sincerely,



Edward F. Swenson, III  
President

enclosures

# Edward F. Swenson & Associates

*Management and Fund-Raising Counsel for Non-Profit Organizations*

3030 West Queen Lane  
Philadelphia, Pennsylvania 19129  
Telephone: 215-842-1748  
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## Scope of Services

### 1. IDENTIFY AND DETAIL PROGRAMS REQUIRING PRIORITY FUNDING SUPPORT

Time to completion: One Month

Objective: This stage of work will result in the following products:

- A. Produce a list of CEM's general operating and program/project priorities for years one and year
- B. Provide, for each program, a detailed description of purpose, need, desired outcomes, timelines and budget. (See Appendix A: Program Profile for a list of project attributes.)
- C. Write a two page, or less, case for support that conveys the goals, vision and mission of CEM. The case for support will be used as part of the text of grant appeals.

This stage will require six days of consulting time. Approximately 3 days may be required to identify and prioritize programs and develop detailed program descriptions (see 1.B. above). This work could be done by EFS or another party, such as Renee O'Leary. Three days is required for EFS to edit a case for support drafted by George Gerbner and to work with George and Kate Duncan to refine CEM's general operating budget.

EFS expects that these work products will be reviewed and approved by CEM's board of directors before going to Stage 2.

### 2. IDENTIFY AND QUALIFY DONOR PROSPECTS

Time to complete: three weeks

Objective: This stage of work will result in the following products:

- A. Develop a donor prospect list to use for fund raising
- B. Complete a list identifying CEM volunteer contacts with donor prospects ✓
- C. Collect application deadlines and grant guidelines

This stage will require research and extensive phone calls to friends of CEM as well as institutional prospects. EFS estimates needing four days to research, qualify and match contacts for approximately thirty major donor prospects.

**3. WRITE GRANT PROPOSALS**

Time to complete: Six weeks\*

Objective: This stage of work will result in the following products:

- A. Send 30 completed grant proposals to CEM for signature, inclusion of attachments (by-laws, IRS letter, etc.) and mailing. ✓
- B. Provide duplicate hard copies and disk files to CEM
- C. Provide instruction sheet for CEM proposal follow-up with donor prospects

EFS estimates 1/2 day per proposal.

**4. PROVIDE CEM WITH A FUND RAISING MANAGEMENT PLAN**

Time to complete: One Month

Objective: To recommend a volunteer and staffing plan to support CEM's on-going development activities

Based on its experience with steps 1 - 3, EFS proposes to draft management suggestions for CEM's development activities. To draft the plan EFS would need two days to talk with CEM leaders and two days to record its findings and draft a development plan.

**Cost of Consulting Services**

EFS charges \$900 per eight hour day for its principals Edward Swenson and Jennifer Shropshire. Grant writing is billed at \$500 a day.

- 1. IDENTIFY AND DETAIL PROGRAMS REQUIRING PRIORITY FUNDING SUPPORT  
Three days EFS - \$2,700\*\*
  - 2. IDENTIFY AND QUALIFY DONOR PROSPECTS  
Four days EFS - \$3,600
  - 3. WRITE GRANT PROPOSALS  
15 days EFS - \$7,500
  - 4. PROVIDE FUND RAISING MANAGEMENT PLAN  
4 days EFS - \$3,600
- Total Contract: \$17,400

\* The estimate of time is based on having stages 1 & 2 thoroughly completed and back-up information (general operating budget, etc. in place.

\*\* As additional 3 days could be billed by Renee O'Leary for program development. required

Edward F. Swenson & Associates  
3030 West Queen Lane, Philadelphia, PA

January, 1997

### APPENDIX A: PROGRAM PROFILE

We believe that it is in the nonprofit's interest to take the time to thoroughly plan and detail proposed projects and programs before starting the grant writing process. The following concept paper provides questions for the nonprofit to answer before proceeding to grant writing. The nonprofit's response should be distilled to a three-four page outline per program.

- I. How does the project or program support the mission and vision of the non-profit?
- II. Why is the project needed now?
- III. Who does the project specifically serve. Who will benefit from this activity/physical improvement?
- IV. What is the timetable for implementation?
- V. Who are the key people (staff, volunteers, etc.) involved in operating/ leading the project?
- VI. What criteria will be used to judge success or failure? Be specific. How will the project be evaluated?
- VII. What is the anticipated budget for the project or program?
- VIII. Provide a budget narrative explaining the budget's major line items. What will the funds pay for? Discuss earned income, if relevant.
- IX. How will the project be funded in the future? Will it become self-sustaining?
- X. What other groups are involved in the planning or implementation? Collaborations?
- XI. Is the project distinctive? Why?
- XII. Could it be replicated, used as a paradigm for others to emulate?

*James Cook*

APPENDIX A: PROGRAM PROFILE

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XII. Could it be replicated, used as a paradigm for others to emulate?

[82] From: cemad@philadelphia.libertynet.org at SMTP-po 3/26/97 5:19PM (2285 bytes: 45 ln)  
To: fgg at POST1  
Subject: agenda for Swenson meeting

----- Message Contents -----

Text item 1: Text Item

Received: by ccm ail from philadelphia.libertynet.org  
From cemad@libertynet.org  
X-Envelope-From: cemad@libertynet.org  
Received: from [208.0.35.238] (ppp-a013.phl.dca.net [208.0.35.238]) by philadelphia.libertynet.org (8.6.12/8.6.12) with SMTP id RAA02599 for <fgg@asc.upenn.edu>; Wed, 26 Mar 1997 17:11:05 -0500  
Date: Wed, 26 Mar 1997 17:11:05 -0500  
Message-Id: <199703262211.RAA02599@philadelphia.libertynet.org>  
X-Sender: cemad@philadelphia.libertynet.org  
Mime-Version: 1.0  
Content-Type: text/plain; charset="us-ascii"  
To: fgg@asc.upenn.edu  
From: cemad@philadelphia.libertynet.org  
Subject: agenda for Swenson meeting

hi George,

As you requested, here's a memo regarding the agenda for our meeting with Ted and Jennifer on April 8 at 2:00. At least, these are the things most important to them:

1. Our operating budget: Peter Buckley's money will only last us for so long, of course. Who are the foundations you're closest to that will fund us, not for specific projects, but for general operations? I thought Carnegie, Ford, Surdna and Rockefeller were most likely. I didn't mention this to Ted and Jen, though; you're in better with the foundations.
2. Affirmation that everything we want to accomplish in the next three years is included in the program priority list. We said that once it's integrated with the three-year plan, all our ideas will be there.
3. Initial ideas about how to launch the first few programs. You and i picking our favorites and acting on them will pre-empt the board; but we don't have until the end of May to get started on these. Why don't we send the list, after our meeting with Ted, to the Board, asking them to vote for three favorites and send them back with ideas on how to pursue them? This way we can tackle some discussion before the meeting, leaving more time to discuss the nitty-gritty. i think we tried this at Asilomar, and no one could agree on which projects were most important. If we decide beforehand, with the board's help, which to pursue first, it will save us time and energy.

Kate

# Edward F. Swenson & Associates

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17 June 1997

George Gerbner, Ph.D.  
Cultural Environment Movement  
3508 Market Street  
Philadelphia, PA 19104

Dear George,

Please find enclosed an invoice for fund-raising and planning services provided to the Cultural Environmental Movement (CEM) during April and May 1997. Could CEM please expedite a check in the amount of \$4,303.00 made payable to Edward F. Swenson & Associates at your earliest convenience. A copy of our timesheet is attached for your records.

The invoice covers 4.7 days of EFS time working with George Gerbner and Kate Duncan and the CEM board in New York. Of this amount approximately 2 days of time were devoted to preparing, facilitating and following-up on the CEM retreat in New York City in late May.

For an analysis of the use of our time, please see pages 4 - 7.

Sincerely,



Edward F. Swenson  
President

enclosures

TIME RECORD FOR CULTURAL ENVIRONMENTAL MOVEMENT

April and May 1997

Edward F. Swenson & Associates

<b>Date</b>	<b>Hours</b>	<b>Activity</b>
<u>April 1997</u>		
8	1.25	Discussion Ted with Jennifer
	2.25	Meeting with George & Kate
	1.0	Draft CEM case
9	.75	Discussion Jennifer with Ted
	2.0	Reading and organization
	1.0	Draft meeting minutes
10	.5	Phone call with Kate
	.5	Memorandum to Kate re: case statement
15	.75	Two paragraph CEM vision statement
21	.50	Phone call with Peter Wirth
25	1.0	Research
	<u>.25</u>	Memorandum re: annual report
	11.5 hours	
<u>May 1997</u>		
1	3.25	EFS meeting with George and Kate
7	.5	Ted and Jennifer discussion
	1.0	Minutes from meeting
23	4.5	Research
28	4.5	Preparation for board meeting
29	2.0	Preparation for board meeting
29	5.5	Board Meeting
30	<u>5.5</u>	Board Meeting
	26.75 hours	
<u>Total hours</u>	<u>38.25</u>	



From: EJSP@aol.com  
Date: Thu, 31 Jul 1997 10:27:10 -0400 (EDT)  
To: LPCL375@utxvms.cc.utexas.edu, rdyson@oise.utoronto.ca,  
william.fore@yale.edu, LKFULLER@javanet.com, JCYama@aol.com  
cc: cem@libertynet.org, ggerbner@pobox.asc.upenn.edu, pwirth@mail.ican.net  
Subject: CEM - Communications Program Profile  
MIME-Version: 1.0

DATE: July 31, 1997

MEMO TO: Cynthia Bock-Goodner, Renee Cherow-O'Leary, Rose Dyson, Bill Fore,  
Linda K. Fuller, Alex Nogales, and Joni Yamaguchi

SUBJECT: Cultural Environment Movement - Communications Program

Please review the attached document, which is the beginnings of a program profile on CEM's Communication Program. Information included to date results from discussions at the board meeting in May.

This document is designed to ensure that appropriate questions regarding CEM's communications program are answered thoroughly and well before we begin writing grants. As you can see, we still have a long way to go and need your wisdom and input. CEM's ability to attract funding will depend greatly on your close attention to and comments on the enclosed profile.

Furthermore, we need committee members to volunteer for developing specific program components. Cynthia and Bill have offered to pursue website expansion. Renee volunteer to pursue the educational video series though it is a long way off.

Your urgent attention requested. Foundation appeals and cultivation visits for CEM's communications program needed to be executed quickly. Please reply to this e-mail with your comments or call us directly at (215) 842-1748 by August 8, 1997.

Thank you.

Ted and Jennifer

cc: Kate Duncan, George Gerbner, Peter Wirth

cem#1:cmail7.31

\*\*\*\*\*  
\*\*\*\*\*

Cultural Environment Movement  
COMMUNICATIONS PROGRAM ñ PROGRAM PROFILE

I. How does the project or program support the mission and vision of the non-profit?

- By developing a brochure to respond to inquiries
- By reaching mass audiences
- By disseminating information to the public rather than just being a

repository

- By increasing the visibility of CEM, making it high profile, a household

name

By being a coordinated mouthpiece for CEM's supporting organizations  
By expanding CEM's resources list

II. Why is the project needed now?

Program components do not currently exist.  
The program would call attention to what CEM does. No other organization is doing what CEM is doing.  
Need to have a quarterly newsletter.

III. Who does the project specifically serve. Who will benefit from this activity?

CEM's supporting organizations and individuals seeking information and a dialogue about issues in the cultural environment.

IV. What is the timetable for implementation?

V. Who are the key people (staff, volunteers, etc.) involved in operating/leading the project?

Committee Members: Cynthia Bock-Goodner, Renee Cherow-O'Leary, Rose Dyson, Bill Fore, Linda K. Fuller, Alex Nogales, and Joni Yamaguchi

Quarterly Newsletter:  
Website Expansion: Cynthia Bock-Goodner, Bill Fore  
Directory and Resource Compendium:  
Audio Tapes:  
Video Series: Renee Cherow-O'Leary  
Annual Advertising Campaign:

VI. What criteria will be used to judge success or failure? Be specific. How will the project be evaluated?

Goals:  
To make existing information more available.  
To create public opinion.  
To expand Internet site.  
To create "duplicable" audio tapes that can be distributed free of charge.  
To create an International track via Citizens for Media Literacy and other groups.  
To reach a large number of people.  
To identify links and strengthen CEM's communications network.  
To strengthen CEM's image and visibility.

Impact Measured by (frequency, thrust, location, participation, etc.):  
Distribution to and use of CEM information by public access stations.

VII. What is the anticipated budget for the project or program?

Income:

Expenses:

VIII. Provide a budget narrative explaining the budget's major line items. What will the funds pay for? Discuss earned income, if relevant.

IX. How will the project be funded in the future? Will it become self-sustaining?

X. What other groups are involved in the planning or implementation? Collaborations?

XI. Is the project distinctive? Why?

XII. Could it be replicated, used as a paradigm for others to emulate?

Date: Sun, 24 Aug 1997 11:24:11 -0400 (EDT)  
From: EJSP@aol.com  
To: GGerbner@pobox.asc.upenn.edu  
Subject: Re: ABC campaign

George,

Thanks for your comments 23 August re ABC campaign. I have printed out a copy here and saved the E-mail file for Jennifer who is in Tuesday the 26th.

I am sorry to miss Friday's meeting. Among other things, I hope you all walk away with some real target dates for you to make personal fund raising visits with donor prospects early in the fall.

Ted

*[Faint, illegible text, possibly bleed-through from the reverse side of the page]*

To: EJSP <EJSP@aol.com>  
From: George Gerbner <ggerbner@nimbus.temple.edu>  
Subject: Re: CEM NEXT STEPS  
Cc:  
Bcc:  
X-Attachments:

When I tried to open your attachment, it bombed (!) and I had to restart the computer. Please send again.

As to your question about candidate for ED, I have established CEM in 1967 and have led it ever since. Of course there is no one with that 38 year track record. So we have to look at people who have shown some initiative within CEM, have a passion for its objectives, participated prominently in its activities, and have good organizing ability, etc. Those are the candidates we must seek.

I look forward to receiving a text (or valid Eudora attachment) version of you notes, including a reminder to me of what I need to do as next steps.

George.

Content-ID: <0\_890260199@inet\_out.mail.aol.com.1>  
>Content-type: text/plain; charset=US-ASCII  
>  
>George,  
>  
>Please find our notes from our meeting at your home yesterday.  
>  
>Jennifer and I will be meeting with Kate on Monday to follow-up.  
>  
>Please especially note that you must stay on top of the search and recruitment  
>process for the new ED, including assembling a small committee of CEM  
>leadership to help in the assessment of candidates.  
>  
>George, between you and me, are any of the current ED candidates really  
>capable of leading the board and working as even close to a peer to you? I  
>am concerned around the entire leadership issue--both on staff and on the  
>board.  
>  
>Lets talk when we can. Also please check these notes to see that they reflect  
>your recollection of the meeting we had.  
>  
>Ted  
>  
>Content-ID: <0\_890260199@inet\_out.mail.aol.com.2>  
>Content-type: application/octet-stream;  
> name="NXTSTPS3.98"  
>Content-disposition: inline  
>  
>Attachment converted: Hard Disk:NXTSTPS3.98 (????/----) (00003C21)

**Ted and Jennifer, 3/27/98 10:56 AM, Freedom Forum**

To: Ted and Jennifer <EJSP@aol.com>  
From: George Gerbner <ggerbner@nimbus.temple.edu>  
Subject: Freedom Forum  
Cc:  
Bcc:  
X-Attachments:

>Date: Fri, 27 Mar 1998 00:19:02 -0500 (EST)  
>Mime-Version: 1.0  
>To: George Gerbner <ggerbner@nimbus.ocis.temple.edu>  
>From: Brian Linson <cemad@libertynet.org>  
>Subject: Freedom Forum  
>Cc: victoria@unagi.cis.upenn.edu  
>Status:

>  
>Dear George and Vicky,  
>  
>This is to introduce the name of a new potential funder,  
>FREEDOME

>  
>I looked them up on their web page , and they are a major funding  
>source for promotion of diversity, representation, access, first  
>amendment, as well as concerns from religious groups. They are  
>working to develop coalitions between free speech and religious groups  
>In 1993 they had a \$700 million budget.

>  
>I have checked their web page, and am turning over to Vicky information  
>for fundraising purposes.

>Vicky is prepared to write a cover letter describing the digital conference  
>and asking for participation and support, to give to you for review, and  
>then sending out. Viewing their web pages, it is clear that they would  
>fund:

- > Digital conference
- > Research on tv news performance. (they are also big into funding  
> professional education for journalists.)
- > Perhaps also Days of action and convention depending on how  
> first initiatives work out.

>We will work on the digital conference as a starting point.

- >1. Please advice us if this is a bad source, for reasons you know.  
> other wise wait for the cover letter.
- >2. Please review the list of officers and trustees in the separate  
> email. Do you know anyone personally among these people, that you could  
> call? If so I will get their contact information for you.

---

>Brian Linson, Research Associate                   tel. (215) 727-3121  
>Cultural Indicators Research Project            fax (215) 204-5823  
>Annenberg Hall, Room 218                       email cemad@libertynet.org  
>Temple University, Philadelphia

---

# Edward F. Swenson & Associates

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*3030 West Queen Lane  
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Facsimile: 215-842-1751*

***COPY***

13 April 1998

George Gerbner, Ph.D.  
234 Golf View Road  
Ardmore, PA 19003

Dear George:

Enclosed is an invoice for fund-raising and planning services provided to the Cultural Environmental Movement during January through March 1998.

You will note that \$180.00 is deducted from the billable amount due for this period. The deduction recognizes that CEM overpaid EFS that for the last billing. Please expedite a check in the amount of \$2,026 made payable to Edward F. Swenson & Associates, Inc. at your convenience.

Enclosed is a timesheet that breaks down the time spent from January through March 1998. Also enclosed is an analysis of our time in relation to the identified tasks in our contract.

Jennifer and I look forward to taking you to lunch on April 16, 12 noon at Yang Ming. This will give the three of us time to set goals and priorities for 1998. We will bring with us an update on the status of CEM's funding proposals with us.

Thank you.

Sincerely,



Edward F. Swenson

enclosures

# Edward F. Swenson & Associates

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Philadelphia, Pennsylvania 19129  
Telephone: 215-842-1748  
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13 April 1998

Cultural Environment Movement

## INVOICE

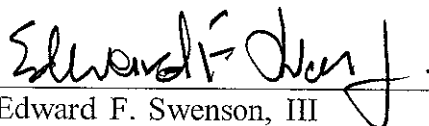
For services rendered **January-March 1998**

Please remit to Edward F. Swenson & Associates, Inc.:

For 12.25 hours lead counsel time (at \$900 per day) .....	\$1,378
For 13.25 hours grant writing (at \$500 per day).....	\$ 828

Less overpayment for October .. (\$180.)  
- December 1997 invoice

**Total \$2,206.00**

  
\_\_\_\_\_  
Edward F. Swenson, III  
President

\*1 day = eight hours



CULTURAL ENVIRONMENT MOVEMENT  
EDWARD F. SWENSON & ASSOCIATES, INC.

Time and Task Analysis

Task One: Identify and Detail Programs Requiring Priority Funding

Time Allocated	4 days+2 days=48 hours
Time Spent 1997	60.85 hours
Time Spent Jan.-Mar.	<u>0.00 hours</u>
Time Remaining	-12.85 hours

**Task Status:** No time was spent on program development during this time period. The modular case statement was finalized to focus on programs that were previously developed: Communications, Day of Action, and the Convention.

Task Two: Identify and Qualify Donor Prospects

Time Allocated	4 days=32 hours
Time Spent 1997	9.75 hours
Time Spent Jan.-Mar.	<u>1.00 hours</u>
Time Remaining	21.25 hours

**Task Status:** Minimal research was conducted in order to confirm prospect list and clarify funder interests before writing letters of inquiry.

Task Three: Write Grant Proposals

Time Allocated	15 days=120 hours
Time Spent 1997	29.50 hours
Time Spent Jan.-Mar.	<u>13.25 hours</u>
Time Remaining	77.25 hours

**Task Status:** The modular case statement is completed. Letters of inquiry were sent to Ben & Jerry's and to the Surdna Foundation. Work is begun on a proposal to the Needmor Fund.

Task Four: Provide CEM with a Fund Raising Management Plan

Time Allocated	4 days=32 hours
Time Spent 1997	21.35 hours
Time Spent Jan.-Mar.	<u>11.25 hours</u>
Time Remaining	-0.60 hours

**Task Status:** EFS has met with CEM leadership several times in this time period. Discussions include developing CEM's membership program, the transition in staffing, a search process for the Executive Director, and briefings prior to George's visit to NYC. In addition, EFS continues to strategize and support CEM in its overall development program.

**CULTURAL ENVIRONMENT MOVEMENT  
EDWARD F. SWENSON & ASSOCIATES, INC.**

Record of Time for January–March 1998

<u>January</u>	<u>Time</u>	<u>Purpose</u>	<u>Task #</u>
13	1.25	Digital proposal	Three
15	0.50	Digital proposal (including tele call w/ Kate)	Three
20	0.50	Digital proposal	Three
29	1.00	Agenda and meeting preparation	Four
	<u>1.75</u>	Meeting with Kate and George	Four
	<b>5 hours</b>		

<u>February</u>	<u>Time</u>	<u>Purpose</u>	<u>Task #</u>
2	0.50	Report for Board Meeting	Four
	0.25	Notes from 1/29 meeting	Four
3	1.00	Report for Board Meeting	Four
	0.50	Research	Two
4	0.25	Modular case statement	Three
13	0.50	Modular case statement	Three
17	2.00	Meeting with Kate	Four
20	0.50	Agenda and meeting preparation	Four
	0.50	Research	Two
23	<u>0.50</u>	Meeting with Kate and George, NYC briefing	Four
	<b>6.5 hours</b>		

<u>March</u>	<u>Time</u>	<u>Purpose</u>	<u>Task #</u>
2	0.25	Call with Kate	Four
3	0.50	Call with George and call with George and Kate	Four
4	1.25	Ben & Jerry's Letter of Interest	Three
5	0.75	Surdna Letter of Inquiry	Three
6	1.25	Ben & Jerry's	Three
	0.75	Surdna	Three
9	0.25	Ben & Jerry's	Three
10	1.50	Surdna	Three
11	1.00	Surdna	Three
12	2.50	Needmor proposal	Three
16	1.00	Preparation for 3/17 meeting	Four
	0.75	Needmor	Three
17	1.50	Meeting with George et. al.	Four
18	0.50	Minutes from 3/17 meeting	Four
23	<u>0.25</u>	Needmor	Three
	<b>14 hours</b>		

**Total hours billed = 25.5 hours**

Edward F. Swenson & Associates

Filed to  
Brown 7/16/99

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Thank you.

Sincerely,



Edward F. Swenson

enclosures

Forward to Bowen  
7/16/99

13 April 1998

Cultural Environment Movement

**I N V O I C E**

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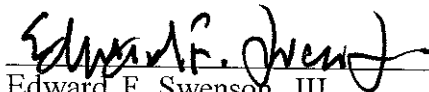
For services rendered **January-March 1998**

Please remit to Edward F. Swenson & Associates, Inc.:

For 12.25 hours lead counsel time (at \$900 per day) .....\$1,378  
For 13.25 hours grant writing (at \$500 per day).....\$ 828

Less overpayment for October .. (\$180.)  
- December 1997 invoice

**Total \$2,206.00**

  
\_\_\_\_\_  
Edward F. Swenson, III  
President

\*1 day = eight hours

**CULTURAL ENVIRONMENT MOVEMENT  
EDWARD F. SWENSON & ASSOCIATES, INC.**

Record of Time for January–March 1998

<u>January</u>	<u>Time</u>	<u>Purpose</u>	<u>Task #</u>
13	1.25	Digital proposal	Three
15	0.50	Digital proposal (including tele call w/ Kate)	Three
20	0.50	Digital proposal	Three
29	1.00	Agenda and meeting preparation	Four
	<u>1.75</u>	Meeting with Kate and George	Four
	<b>5 hours</b>		

<u>February</u>	<u>Time</u>	<u>Purpose</u>	<u>Task #</u>
2	0.50	Report for Board Meeting	Four
	0.25	Notes from 1/29 meeting	Four
3	1.00	Report for Board Meeting	Four
	0.50	Research	Two
4	0.25	Modular case statement	Three
13	0.50	Modular case statement	Three
17	2.00	Meeting with Kate	Four
20	0.50	Agenda and meeting preparation	Four
	0.50	Research	Two
23	<u>0.50</u>	Meeting with Kate and George, NYC briefing	Four
	<b>6.5 hours</b>		

<u>March</u>	<u>Time</u>	<u>Purpose</u>	<u>Task #</u>
2	0.25	Call with Kate	Four
3	0.50	Call with George and call with George and Kate	Four
4	1.25	Ben & Jerry's Letter of Interest	Three
5	0.75	Surdna Letter of Inquiry	Three
6	1.25	Ben & Jerry's	Three
	0.75	Surdna	Three
9	0.25	Ben & Jerry's	Three
10	1.50	Surdna	Three
11	1.00	Surdna	Three
12	2.50	Needmor proposal	Three
16	1.00	Preparation for 3/17 meeting	Four
	0.75	Needmor	Three
17	1.50	Meeting with George et. al.	Four
18	0.50	Minutes from 3/17 meeting	Four
23	<u>0.25</u>	Needmor	Three
	<b>14 hours</b>		

**Total hours billed = 25.5 hours**

CULTURAL ENVIRONMENT MOVEMENT  
EDWARD F. SWENSON & ASSOCIATES, INC.

Time and Task Analysis

Task One: Identify and Detail Programs Requiring Priority Funding

Time Allocated	4 days+2 days=48 hours
Time Spent 1997	60.85 hours
Time Spent Jan.-Mar.	<u>0.00 hours</u>
Time Remaining	-12.85 hours

**Task Status:** No time was spent on program development during this time period. The modular case statement was finalized to focus on programs that were previously developed: Communications, Day of Action, and the Convention.

Task Two: Identify and Qualify Donor Prospects

Time Allocated	4 days=32 hours
Time Spent 1997	9.75 hours
Time Spent Jan.-Mar.	<u>1.00 hours</u>
Time Remaining	21.25 hours

**Task Status:** Minimal research was conducted in order to confirm prospect list and clarify funder interests before writing letters of inquiry.

Task Three: Write Grant Proposals

Time Allocated	15 days=120 hours
Time Spent 1997	29.50 hours
Time Spent Jan.-Mar.	<u>13.25 hours</u>
Time Remaining	77.25 hours

**Task Status:** The modular case statement is completed. Letters of inquiry were sent to Ben & Jerry's and to the Surdna Foundation. Work is begun on a proposal to the Needmor Fund.

Task Four: Provide CEM with a Fund Raising Management Plan

Time Allocated	4 days=32 hours
Time Spent 1997	21.35 hours
Time Spent Jan.-Mar.	<u>11.25 hours</u>
Time Remaining	-0.60 hours

**Task Status:** EFS has met with CEM leadership several times in this time period. Discussions include developing CEM's membership program, the transition in staffing, a search process for the Executive Director, and briefings prior to George's visit to NYC. In addition, EFS continues to strategize and support CEM in its overall development program.

# Edward F. Swenson & Associates

*Management and Fund-Raising Counsel for Non-Profit Organizations*

*3030 West Queen Lane  
Philadelphia, Pennsylvania 19129  
Telephone: 215-842-1748  
Facsimile: 215-842-1751*

12 June 1998

George Gerbner, Ph.D.  
234 Golf View Road  
Ardmore, PA 19003

Dear George:

It was good to see you the other day, but so sorry about the loss of part of the tree in your front lawn. George, I have enclosed two invoices that bill for EFS time devoted to CEM since January 1998. EFS grant writing, research, and program development activities during this period are within our contract's scope of services and cost parameters.

The invoice dated 13 April 1998 is one we submitted to Kate Duncan before she left CEM. It covers consulting services provided to the organization from January through March 1998. The second invoice covers April and May 1998. Each invoice has a timesheet that breaks down EFS's time and an accompanying analysis of tasks completed.

Could you please review these invoices and expedite them at your earliest convenience? In the meantime, it has been a pleasure to work with Victoria Tredinnick and we sincerely hope our collective efforts with foundations will get results soon.

Thank you.

Sincerely,



Edward F. Swenson

enclosures

Edward F. Swenson & Associates

*Forwarded to Brian  
7/16/99*

*Management and Fund-Raising Counsel for Non-Profit Organizations*

*3030 West Queen Lane  
Philadelphia, Pennsylvania 19129  
Telephone: 215-842-1748  
Facsimile: 215-842-1751*

12 June 1998

Cultural Environment Movement

**INVOICE**

For services rendered April-May 1998

Please remit to Edward F. Swenson & Associates, Inc.:

For 4.25 hours lead counsel time (at \$900 per day) .....	\$478
For 9.75 hours grant writing (at \$500 per day) .....	\$609

**Total \$1,087**

*Edward F. Swenson, III*  
 \_\_\_\_\_  
 Edward F. Swenson, III  
 President

\*1 day = eight hours



**CULTURAL ENVIRONMENT MOVEMENT**  
**Edward F. Swenson & Associates, Inc.**

Time and Task Analysis – April-May 1998

Task One: Identify and Detail Programs Requiring Priority Funding

Time Allocated	4 days+2 days=48 hours
Time Spent 1997	60.85
Time Spent Jan.-May	<u>0.00</u>
Time Remaining	-12.85 hours

*Task Status:* No time was spent on program development during this time period.

Task Two: Identify and Qualify Donor Prospects

Time Allocated	4 days=32 hours
Time Spent 1997	9.75
Time Spent Jan.-Mar.	1.00
Time Spent April-May	<u>1.00</u>
Time Remaining	20.25 hours

*Task Status:* Minimal research was conducted in order to clarify funder interests before grant writing and producing an update memo for Vicki Tredinnick.

Task Three: Write Grant Proposals

Time Allocated	15 days=120 hours
Time Spent 1997	29.50
Time Spent Jan.-Mar.	13.25
Time Spent April-May	<u>9.75</u>
Time Remaining	67.50 hours

*Task Status:* A draft proposal to the Needmor Fund was written and we prepared for writing a proposal to the Philadelphia Foundation.

Task Four: Provide CEM with a Fund Raising Management Plan

Time Allocated	4 days=32 hours
Time Spent 1997	21.35
Time Spent Jan.-Mar.	11.25
Time Spent April-May	<u>3.25</u>
Time Remaining	-3.85 hours

*Task Status:* EFS provided Vicki Tredinnick with an update on prospects and next steps and commented on the draft membership brochure.

**CULTURAL ENVIRONMENT MOVEMENT**  
**Edward F. Swenson & Associates, Inc.**

Record of Time for April-May 1998

<u>April</u>	<u>Time</u>	<u>Purpose</u>	<u>Task #</u>
10	0.50	Needmor Fund proposal	Three
13	1.25	Needmor Fund proposal	Three
	1.00	Prospect research	Two
16	<u>1.25</u>	Needmor Fund proposal	Three
	<b>4.00 hours</b>		
<u>May</u>	<u>Time</u>	<u>Purpose</u>	<u>Task #</u>
11	2.50	Needmor Fund proposal	Three
12	2.00	Needmor Fund proposal	Three
14	2.00	Needmor Fund proposal	Three
18	0.75	Call with Vicki	Four
20	1.00	Update memo to Vicki	Four
21	1.00	Membership letter	Four
27	0.50	Update memo to Vicki	Four
	<u>0.25</u>	Philadelphia Foundation proposal preparation	Three
	<b>10.00 hours</b>		

To: Cultural Environment Movement <cem@libertynet.org>  
From: George Gerbner <ggerbner@nimbus.temple.edu>  
Subject: Re: update on CEM activities 6/17  
Cc:  
Bcc:  
X-Attachments:

Hi --

My comments:

FUNDRAISING

>I just sent you an email which you will use to write a letter to Swenson  
>terminating our relationship with them. I will look into Steege-Thompson as  
>a potential fundraiser. We have money in the bank to pay them.

Received notes on Swenson; will try to get to this ASAP and send you draft of letter for comment. Will also review my file on Steege-Thompson, may also call them.

>

>BROCHURE

>I am working on a final copy based on your latest comments.

Look forward to final draft of text, format. Hope to get this in the mail before people scatter for summer -- or hold for fall.

>DIGCON

>You are working on the Short Plan and Budget. These are intended for  
>fundraising and general info about the conference. It appears that we may  
>have to rethink the whole thing, since the plan as it stands is perhaps  
>overly ambitious.

>

Will review and get back to you.

>RWJ Final Budget Report

>I was able to work out a final report from the information left by Nejat.  
>I'll be sending it in tomorrow. At the same time I will request they pay  
>the balance of \$4777 that they owe us.

>

Good.

>MONITOR

>Next step is to have a meeting to discuss content. I don't know which will  
>be easier. There are two ways of going about this. You and I could meet  
>to look at what we have on hand and decide on what content we have yet to  
>draw up or solicit, etc. Then I will go to Joni Yamaguchi with that. Or, I  
>will contact Joni Yamaguchi and find a time when the three of us can get  
>together to make those decisions.

>

Next issue should feature convention, and keynoter. Will send out letters and try to get commitment of one or more "celebrities." We shall meet on content when that feature is in place. Remember the dual format: New contacts get old Monitor plus new; old contacts only new. Need to figure out how to do that with post office.

>CONVENTION

>Part-time person can't start until the fall. I will get in touch with Yahya  
>to start making plans for fundraising, timelines, etc.

>

>

Yes, please do.

June 20, 1998

Edward F. Swenson & Associates  
3030 West Queen Lane  
Philadelphia PA 19129

Dear Ted:

Thank you for your letter and enclosures of June 12, 1998.

We find the January-March invoice for \$2,206 in order, and a check for that will be mailed to you by Victoria Treddinick.

As you will recall, I concluded our meeting of April 16 by noting that the minimum requirement for fundraising is to raise enough money to pay the cost of fundraising. Until we reach that goal, we are unable to pay more than the \$2,206 payable under the contract, which, incidentally, expired on March 31, 1998.

We have high hopes that your most recent efforts will soon bear fruit and we can then consider renewing our contract..

Sincerely yours,

George Gerbner  
President

234 Gulf View Rd.  
Ardmore, PA 19003

cc: Victoria Tredinnick  
Program Director