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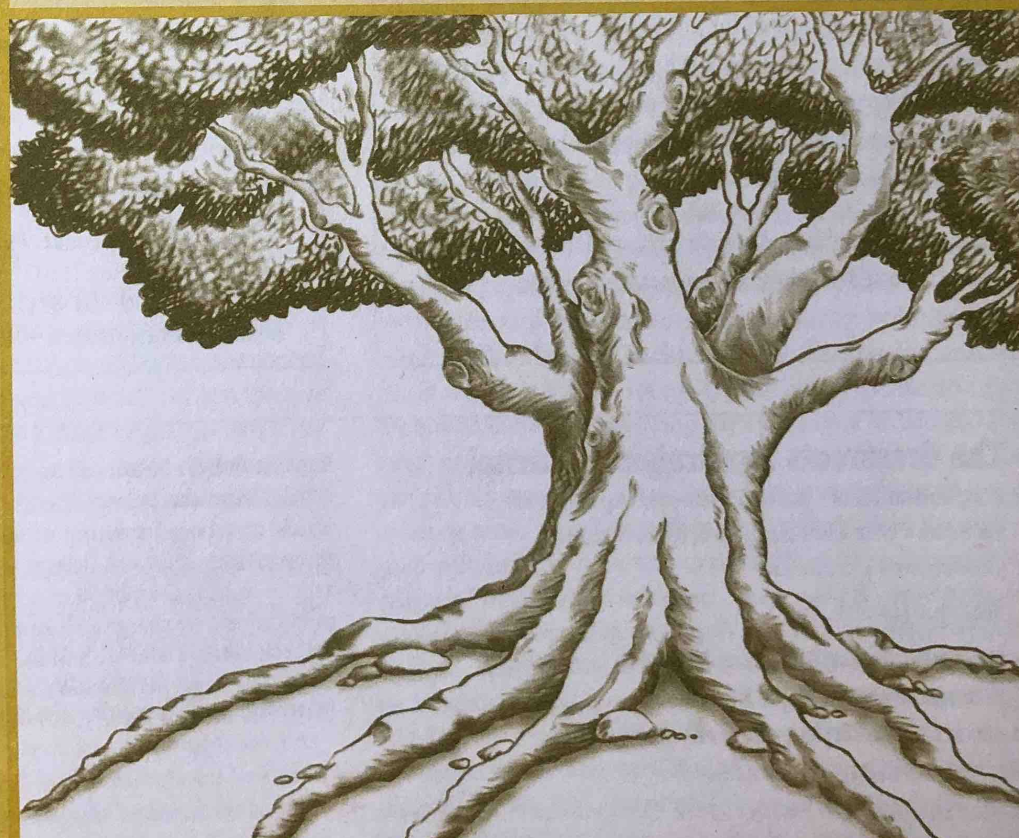

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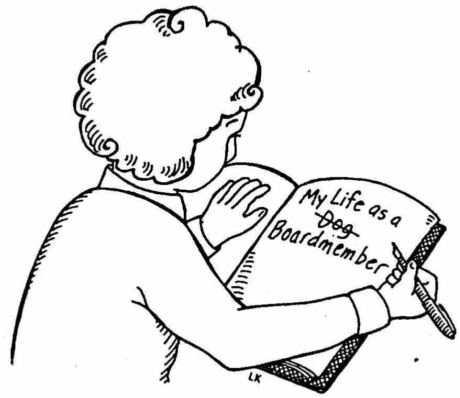
CHARDON PRESS

Reflections from a Board Member

by Stephanie Roth



I have experienced the complexities of boards from many angles and perspectives — as a staff member, board member and consultant/trainer. Although I have probably spent as much time over the last 17 years consulting with organizations on how to strengthen their boards as I have serving on them, it is my experiences as a board member that have led me to write this article.

Most people involved with nonprofits know how difficult it is to find one with a well-functioning board. An exercise I've borrowed from consultant/trainer Burke Keegan asks participants to brainstorm qualities of "The Board from Hell." Whether I'm working with staff people or board members, this exercise never fails to get a laugh as well as produce pages and pages of problems they've experienced with their organization's board.

Kim Klein and I have often discussed the problem of the very structure of nonprofit organizations, whereby a group of volunteers who do not have day-to-day involvement with the work of the organization nevertheless has ultimate legal responsibility for what it does. But short of creating an entirely new model, we need to figure out ways to make the experience of being on a board of directors a more fruitful and satisfying — not to mention useful — one.

I have spent many years trying to convince groups of both board and staff people that fundraising is an essential part of a board member's responsibilities. When people have said to me, "But we're not a fundraising board," my response has been, "Then you're not a very effective one either, because fundraising is an important responsibility of any nonprofit board."

Lately, however, I've begun to observe situations where board members feel that fundraising is the *only* thing the staff wants them to work on, and that their role in program, governance, and strategic thinking and planning is not considered essential or even particularly desired. This attitude reinforces a dangerous separation of fundraising from programmatic work, hindering everybody's efforts on behalf of the organization. Ideally everyone should be involved in both fundraising and programmatic work. Board members are far more effective in raising money if they are involved, familiar, committed and passionate about the organization's work.

And it's important to realize the way fundraising enhances programmatic work beyond the dollars brought in. Fundraising is an essential part of the work that builds new constituencies, involves members, volunteers, and community leaders in making the work more visible and in developing new interest in and sources of support for the organization. When board members ask their friends, family, colleagues and neighbors to make a contribution, attend a special event, or puchase a raffle ticket, they are recruiting potential new allies and supporters to the cause.

As a professional fundraising consultant, it came as a surprise to me to become a member of a board that had high expectations of my work raising money for the organization, but did not want me to ask any questions about fundraising strategies, the financial growth of the organization, or how decisions about budget and fundraising were made. I realized that without being involved in developing the fundraising plan and in analyzing the effectiveness of past efforts I was not as motivated to carry out fundraising tasks. Also, in order to maintain my enthusiasm for asking people for money, I needed to be part of the discussions about how our programs were making a difference in the world — how effective they were at stopping sexism, or challenging racism, or ending violence against gay men and lesbians, or halting environmental devastation from corporate polluters.

I realize that my background in fundraising and nonprofit management is not the typical board member's experience, and I'm happy to bring my experience to causes I most care about. But, like other people, I join boards to learn something new and to gain new skills as well as to use my existing ones. Board members want to engage in the analysis that will inform how the organization does business this year and in the years to come. They want to have opportunities to participate in national conferences and other activities to learn more about the issues and, ultimately, to become stronger advocates for the organization and its cause.

Board members are becoming frustrated with the problems of serving on a board. One board member complained to me that the actual work of being on the board was totally different from what he had expected — and that he didn't like it very much. Most of his time was spent talking about personnel matters, by-law revisions, recruitment of new board members, and fundraising. His enthusiasm about the actual work of the organization had waned as any input or involvement on a programmatic level was discouraged by the executive director and limited to staff reports that were given at board meetings.

From complaints I hear from members of other boards, this scenario is seems to be a common one. People join boards because they care about the cause and want to give their time and money to something they believe in deeply. Too often, however, the actual experience of being on the board is one of long meetings with lots of time spent focused on administrative details, crisis management around personnel or funding problems, and being told endlessly that they aren't raising enough money.

Too often staff people view board meetings as a necessary down side to their job responsibilities. From their viewpoint, the meetings take a lot of time to prepare for, and only lead to more work as a result of demands that board members make of them. I recently met with the executive director of an organization on whose board I served until last year. She wanted my advice about how she could strengthen the board and develop a better working relationship with its members. At one point in the meeting I said, "Please be completely honest with me. Do you find the board of directors to be mostly a burden, a group you have endless obligation to, but that you get very little back from?" She confessed that that was how she felt much of the time.

A Challenge

I'd like to put out a challenge to my colleagues who serve on the boards of organizations they care deeply about, and to the staff members we work closely with: let's create ways to have a true partnership where each member of an organization — staff, board, client, member — has an important role to play in furthering the mission.

It's true that some board members may become too involved in what is appropriately the work of the staff and fail to recognize when they have begun to try to micromanage these activities. Most board members, however, have neither the time nor the inclination to work at this intimate a level. Nevertheless, micromanaging by board members must be guarded against by clarifying the difference between the job of the board members and that of staff. For any organization, the exact responsibilities of board and staff will depend on the size of the organization, its stage of development, number of staff people and other factors. At the same time, staff and board members must find meaningful and appropriate ways to involve board members in an organization's programmatic work. Without an appreciation for their desire and ability to be more than fundraising machines, crisis managers and names on a letterhead, it will get harder and harder to find committed, skilled and enthusiastic people to serve on boards.

How can we begin?

The reality of running a nonprofit in the 90's is that everyone — board members, executive directors, and other management staff — feels beleaguered by having to do too much administration and fundraising work. They resent how little time is left for the work that drew them to the organization in the first place. But it costs more to run a nonprofit today because of more expensive technology (computers, fax machines, etc.) and increased competition for less funding. Cutbacks have meant less money from government funding sources while competition grows from an expanding number of nonprofits for private-sector funds. While there is more money in absolute dollars from the private sector every year, this growth has not made up for the loss of funds from government sources.

I have two suggestions for ways to cope with what is a real problem. The first is to be clear with all members of the organization that fundraising is part of the work, not some thankless task that allows others to do the "real" work. And second, serious discussions about what's happening in the field, how our organizations should respond to changes in the larger society that affect our work, and even what kinds of new program areas the organization should consider, need to take place among *all* members of the organization and genuinely include the perspectives of board, staff, volunteers and other constituents. For example, organizations can schedule an annual board-staff retreat to give themselves the time to have more open-ended and thoughtful discussions. Or schedule time at each board meeting to reflect on these issues. Don't let the "business" part of the work overwhelm the commitment people have to the mission of your organization.

Being a board member can be a thankless job if not approached enthusiastically by both board members and staff. But with attention to the board being truly the "owners" of the organization that they are, being a board member can produce huge rewards for both the organization and the individual. GFJ

Stephanie Roth is an organizational consultant and co-publisher of Chardon Press.

Site Visits: *The Make It or Break It Decision*

by Susan Castelli

Editor's Note: *This article is reprinted with permission from* Sharing, *the newsletter of Co-Op, Community Services Linking Community Services. Although this article is specifically about getting ready for foundation site visits, many of the same insights apply to preparing for visits from individual donors or even preparing a presentation about your organization.*

Many funding organizations conduct site visits not only during the grant application process, but also after funding is given in order to check the progress of the project. Most of the information contained in this article pertains to pre-funding site visits, but some will be applicable to either type.

For many nonprofits, a site visit from a funder can be a scary prospect. These visits play an integral part in most funding decisions, and therefore require the same level of attention and preparation as the grant proposal. Nonprofits should also view site visits as a great opportunity to show their good work and to build relationships with funders. In this article, the site visit process will be explored from the perspectives of both funders and nonprofits.

Purpose of Site Visits

Most of the funders we spoke to agreed that the site visit is one of the most important steps in the grant application process. The grant proposal provides introductory information, but the site visit gives the potential grantor more hands-on data about the program, the agency, and the people who will be working on the project. Through this data gathering, funders want to get a realistic "feel" for the project and the organization on its own turf, to verify the information from the grant proposal, to clarify issues and to answer questions. Sometimes funders use site visits to try out changes they think will strengthen the project. In post-grant visits, the funder wants to gauge project accomplishments.

Some of the specific things funders look for are:

- Is the staff committed, competent, energetic? (Funders especially want to meet those who will be running the project, as well as the creators.)
- What are the relationships among the staff?
- Is the board knowledgeable and committed to the project?
- Where will the project take place?
- Does the organization's allocation of its resources to this project reflect its level of commitment to the project?
- Does this project meet grant requirements?
- Is the organization doing what it says it is doing?
- Are the plans realistic?

Preparation for Site Visits

While funders have specific goals for the site visit, the nonprofit organizations should decide what they want the visit to accomplish also. Organizations should use this time to find out if they are on the right track with their proposals and if the project is appropriate to the funder's goals. This is the time to shine and to show this funder why it would be a good idea to grant funding to the program. Use this visit as an opportunity to show what you've accomplished and how your organization is different from the others. In order to do this, careful planning is needed. Most funders will ask for information that they need in advance of the visit. Be sure to provide clear directions to the location where the meeting will be held. If not included in the proposal, some things to offer funders are:

- Written descriptions of the agency and the program to be funded
- Budgets and objectives for the project
- Written description of community need of project
- History of organization
- List of board members
- Audit reports
- Chapter and IRS designation

Remember that the information discovered during the site visit can be a "deal maker" or "deal breaker," so it is important for organizations to plan carefully what messages they want to get across. Make an effort to talk with the funders before the visit to find out exactly what they want to see while they are there. Some funders will even provide a list of questions they would like answered during the visit. One very important suggestion from several nonprofits is to make sure that the proposal is reviewed thoroughly before the visit takes place. Specific questions concerning the information submitted in the proposal will be asked and everyone needs to be familiar with that information.

The individuals from your organization who will be involved in the site visit will need to meet before the visit and agree on points that need to be emphasized. All information should be factual and truthful and able to be backed up with statistics, testimonials, samples of work, etc. Every person in the agency who is going to be involved in the visit needs to be able to answer the funder's questions. You will want to have all written materials and supporting documentation available, but know the information well enough that you don't have to spend time shuffling through papers during the meeting. Also, be sure to review all documentation before the meeting to ensure its accuracy.

When appropriate, try to arrange for the funder to be involved in an activity during the visit that will help them better understand the project's goals and needs. Also be prepared to discuss the results of the work you've done. If possible, you will want to make outcome measures related to past and present performance available to the visitors.

Who Should Participate

A key element in preparing for the site visit is deciding who will participate. This decision is important for both funder and nonprofit since these people will help decide the fate of the grant. All the funders we spoke to said that they send members of their staffs to the site visits. Many others also have board and/or committee members attend these visits. Depending on the nature of the grant and the proposal, funders may also send a community representative or someone who has expertise in the field that the grant concerns. These additional people may be enlisted to help the funder gain an outsider's perspective on the applying agency.

All of the nonprofit organizations we spoke to agreed that staff and board members are essential representatives during site visits. Board members will be especially helpful if the funders bring volunteers from their organizations because they can talk on a volunteer-to-volunteer level. Choose staff and board members who are familiar with the grant proposal and the project to be funded. Also make sure that these representatives are dedicated to your cause and are in agreement with the message to be presented.

Many other organizations suggested that clients could be enlisted to help with this process, where appropriate. Keeping the dignity and confidentiality of the client in mind, decide if it would help the funders better understand the project if they were to meet a client. Another option is to show the project to be funded in action serving a client.

Funders will have in mind who they would like to encounter during their visit. Again, you can ask them beforehand if there are specific people they would like to meet. Some of the funding organizations we talked to suggested these individuals should be present:

- Directors
- Fiscal officers, record/bookkeepers
- People who wrote the proposal
- People who will be running the project
- People who planned the project
- Community member involved in project planning
- People who are served by the project
- Board members

What Takes Place During the Visit

So, what's going to happen once the day of the site visit arrives? The agenda is usually set by the funder, in cooperation with the organization. As stated before, funders usually have in mind what they'd like to see and what questions they want answered. Most of the time they will share this with the organization, giving the agency the opportunity to plan. Funders stated that site visits last anywhere from 30 minutes to 3 hours depending on the depth of the program and the amount of information requested.

What the funder wants to see will vary depending on the program and the grant being offered. Some basic items include:

- Staff in action
- Clients being served (if appropriate)
- Records (client, financial, etc.)
- Where the program will take place

Since the site visit is a relatively short amount of time for the funders to get to know everything about the organization, spend this time productively. Some suggestions from funders include:

- Show the facility
- Set up discussion sessions with staff
- A brief tour pertaining to the project to be funded

Horror Stories

Why is preparation so important before a site visit? Check out some of these horror stories.

- Organization representatives had no idea what had been said in the grant proposal
- Organization staff had a big screen TV blaring in the background as funder tried to ask questions
- Executive director did an hour monologue on the organization
- No one was at the organization when funders arrived for scheduled visit
- Agency had 12 people reading from a script
- Funder noticed visible disagreement between staff and board members
- Funder could hear people inside of organization facility, but no one would answer the door
- A funder asked a question and agency board member responded "I'd like to know that answer myself"
- Funder told organization not to prepare specific details and then asked for specifics during visit
- Numbers presented by organization to funder didn't add up
- Funding representative slept through visit and then wanted to sightsee and play golf
- A child client kicked a funder because he/she felt ignored
- Funder wanted to dictate the working hours of the agency and stated that the agency received too much federal monies

CAN YOU ANSWER THESE QUESTIONS?

If you and your staff can confidently answer these questions and back up your answers, you are well on your way to being prepared for a site visit.

- □ What is your mission/why were you created?
- □ How does this project help carry out your mission?
- □ How will you judge if your project is successful?
- □ Is the time period reasonable?
- □ Have you listed everything you will need?
- □ What difference will this project make to the community?
- □ Are others providing this service?
- □ Could a partnership with another agency be possible?
- □ Is your budget appropriate?
- □ How will the project pay for itself in the future?
- □ What would happen if your project didn't get done?

- One nonprofit followed all the steps and got prepared for its site visit, only to discover that the funder was expecting the meeting to be at its office. Note: There are "reverse site visits"-when the organization is invited to visit the funder's location.

Great experiences

So what happens when you do prepare? Here are some examples of great experiences from both perspectives.

Funder perspective

- Arrived at site visit to find the thinking on project had continued since the proposal was submitted
- Staff was open, honest, prepared, and obviously dedicated to the cause
- Project activities were occurring as presented in proposal

Nonprofit perspective

- Site visitors got involved in activities
- Organization research backed up claims in proposal
- Site visit ran 1½ days shorter than indicated
- Received perfect program audits throughout agency
- The visitors came well prepared, knowledgeable about the application, clear on guidelines, listened well, and sought clarification

Do's and Don'ts

Funders and nonprofits were asked to give suggestions to each other.

Nonprofit Organization Do's

- Be honest
- Listen to site visitors
- Have finances in order
- Be realistic
- Be prepared
- Let project person talk
- Keep hype down
- Show belief in program
- Keep funder informed of major changes in programs or activities
- Follow requested agenda
- View relationship as a partnership
- Share information about challenges
- Keep cool under questioning
- Send thank you's for grant received
- Ask for funder's help
- Ask questions
- Ask "your place or mine?"

Nonprofit Organization Don'ts

- Promise things you can't deliver
- Pretend to be something you aren't
- Be confrontational
- Be dishonest or hide things
- Use lots of jargon
- Read from a script
- Get defensive
- Attempt to second-guess outcome
- Let the funder find out problems through the grapevine
- Make negative comments about peers
- Overload visitors with unnecessary detail
- See visitors as adversaries
- Have an attitude of being "entitled"
- Make contact with Site Review Team members on an individual basis
- Attempt to exert political pressure

Funding Organization Do's

- Talk about concerns up front
- Approach staff with respect
- Read materials requested in advance
- Prepare team members as to messages to be imparted and their roles
- Provide opportunities for agency to give feedback on needs
- Spend enough time to understand the request and operations
- Be open to innovative approaches to service delivery
- Tie funding to performance
- Schedule visits to minimize service disruption
- Provide organization with advance questions and expectations
- Give organization guidance as to the purpose of the visit
- Make a realistic schedule
- Ask questions

Funding Organization Don'ts

- Impose unrealistic demands
- Establish an adversarial climate
- Lead the agency to think they have the grant "in the bag"
- Assume organization is trying to get away with something
- Impose personal likes and dislikes in reporting
- Think funding entitles you to dictate the agency's day-to-day operations
- Send out proposal requests when funds are not available

Most of all, both sides should look at site visits as great opportunities. Funders are allowed to see the program at work and learn more about the ideas behind the proposal. Organizations are given the opportunity to give funders in-depth detail that can't be covered in a proposal. Meet each other half way by planning ahead and working through the process as you would any other mutually profitable relationship. GFJ

Susan Castelli is the former editor of Sharing, *the Co-Op newsletter. A number of foundations and community organizations contributed input to this article.*

Co-Op — Community Services Linking Community Services — is a Tennessee organization that provides a turf-free, non-political forum for collaboration on decisions affecting individuals and their communities.

Getting The Word Out, Part One:

Developing a Publicity Plan for Your Organization

by Andy Robinson

Call up your favorite nonprofit group — or even a group you know nothing about — and ask, "What's your biggest problem?" Whoever answers the phone is likely to answer, "We need more money" or "Not enough people know about our work."

While these answers often mask deeper problems, they are still very real. Not surprisingly, they are also related. It's tough to raise money without broad public understanding of why you exist or what you do. Publicity and fund development are so tightly linked that in many grassroots groups the main fundraiser is also the person who writes the brochure copy and mails out the news releases.

Fundraising and promotional work are alike in another important way: both are based on common sense. You don't need an advanced degree or twenty years of experience to generate positive, provocative publicity for your group — but you do need a plan.

TUCSON BOTANICAL GARDENS

Native Seeds SEARCH

1993 Chile Fiesta
Publicity and Promotion Plan
October 23-24 at Tucson Botanical Gardens
1992 attendance: 10,000 / 1993 goal: 12,000

1. **Pre-event articles and calender notices** are already scheduled for *Arizona Highways*, *Sunset*, *Arizona AAA Highroads*, and *Tucson Guide*. News releases have been mailed to twenty local and regional publications.

2. **Additional news releases** will be sent to dailies, weeklies, radio and television one month and again two weeks before the event, with phone follow-up to appropriate writers and editors. Radio PSA copy will also be provided. Photos are available for editors who wish to use them.

3. **A professionally produced television PSA** will be prepared at a local network TV studio for distribution one month before the event. This marks the third year we have produced and distributed a PSA for local TV.

4. **The Arizona Daily Star will again be primary sponsor** of the Chile Fiesta and will provide 600 column inches of display advertising beginning the first week of October. We also anticipate feature coverage in their *StarLight* section on Friday, October 22.

5. **Professionally designed posters** (1200 copies) and flyers will be distributed beginning six weeks before the event.

6. **Live television and radio remote broadcasts** will be arranged for the week of the Chile Fiesta. Last year we did six remotes with Tucson and Phoenix radio and TV.

7. **Tucson Botanical Gardens and Native Seeds/SEARCH catalog and newsletters** will promote the event; these publications reach a combined audience of 40,000 dedicated households.

8. **Advance tickets** will again be offered through the *Arizona Daily Star* sales offices and selected retailers.

9. **An eight-page tabloid program** and event schedule will be distributed at the Chile Fiesta.

Sample comprehensive publicity plan

Why publicize?

Since publicity equals attention, start by asking yourself, "Why do we want attention?" This might sound like a pointless question, but consider it carefully. Your publicity plan should be designed to meet *specific publicity goals.* Without a clear idea of why you're publicizing your organization or event, it will be impossible to define your goals. A list of potential answers should include:

1. Public education. Do you have an issue or cause or program or complaint? Do you offer a service or fill a public need? Are you doing something nobody else does? Unless the community knows who you are and what you do, the community won't be able to act/participate/take a stand/give a damn. You have to make your concerns everyone's concerns. In doing so, you must also provide opportunities for action.

2. Credibility. We tend to respond more favorably to an idea or an organization if we've heard about it previously. By publicizing your organization, you lay the groundwork for increased participation down the road. People may not care at first, but they tend to get interested after repeated exposure. (Why do you think they run the same television commercials again and again?)

3. Membership recruitment/fundraising. If you are actively seeking new donors or members or supporters, you must get their attention first. Good publicity (even bad publicity) is often a prerequisite to successful fundraising.

4. Attendance at events. People won't come to your benefit/rally/seminar/concert unless they know the basics: what, where, when, who, why, and how much it costs. Most organizations that produce events of any kind live and die by their publicity. Never assume that people will "just find out about it." They won't, unless you tell them — several times.

5. Leadership development. At the risk of oversimplifying things, promotional work is a good way to keep your members and volunteers active. People want to participate, and if you give them something to do — even something mundane, like stamping postcards or putting up posters — they are more like to stay involved. Especially talented volunteers might want to help devise a publicity plan or take major responsibility for implementing it.

6. Morale. It sure feels good to pick up the newspaper and see an article about your work, or talk to a friend who says, "Wasn't that your group on the news last night?" Such morale boosters make the pick-and-shovel organizing much easier.

Designing a publicity plan

Your goal: reach the right people at the right time for the right price and the right amount of effort. Given your skills and your budget, what are your options? Some things to think about:

1. Target audience. Who do you want to reach? Think in terms of constituencies: what groups of people, what kinds of people, would be most likely to participate? Who is most likely to share your interests? How can you best reach members of other organizations in your area whose program or constituency overlaps with yours?

On the other hand, are there people who would not ordinarily be interested, but you want to reach anyway? (Warning: this strategy is seldom cost-effective.) To borrow language from the advertising industry, you have to analyze your market and target your publicity campaign accordingly.

2. Budget. How much money is available, and when will it be available? Be very cautious in budgeting for publicity. Many organizations have lost money on benefit events by spending too much on publicity.

3. Labor pool. How many volunteers and/or staff do you have? Leafletting can be a great attention-getter if you have lots of volunteers to hand out flyers. On the other hand, if you have to pay people to do it, it's probably not worth it. The same holds true for mailing parties.

4. Timeline. How much time do you have to achieve your goal? If you're publicizing an event, how long until the event takes place? Some promotional strategies are only effective over the long run, while others are appropriate if you need instant attention. As usual, it's best to plan ahead.

5. Newsworthiness. If you want news coverage, learn to think like a journalist and design your publicity plan accordingly. Read the newspaper analytically and try to figure out why some stories get prominent play, some are buried on page 12, and some are ignored altogether.

Sensationalism has a lot to do with it, so if you can build something sensational into your plan, great. Conflict is always good for getting media attention. Timeliness is vital: are you doing something that's important now? Can you "piggyback" on, or react to, a breaking news event? These are the main components of a "hard news" story.

An alternate approach is the "human interest" story: woman conquers disease, man carries on lone battle against city hall, artist paints murals of junk yards to protest garbage, etc. If you've got an unusual or kooky or touching angle, use it. This provides a handle for the news media to grab. If you can design your program to include several media handles, you are more likely to get coverage.

If you are just trying to get publicity for an upcoming performance or benefit, it's simply a matter of getting your materials to the right people at the right time. Read on.

Publicity options

1. News release. Also known as a press release, even though it can (and should) be sent to the broadcast media. It might be helpful to mentally divide your releases into two categories: a "hard news" release which describes the group's program or activities (your goal: a detailed feature story), and a "calendar" release which promotes an upcoming event (goal: a feature story and/or calendar coverage).

Most news releases are limited to one page, double-spaced, although major stories might warrant more pages. (However, for an international event commemorating Hiroshima Day, I once distributed a 5-page release that was used by Time Magazine, the Washington Post and monay other major news outlets). Be sure to provide the basic information — who, what, where, when, why — plus a relevant quote from someone involved with the project. If available, enclose an appropriate black-and-white glossy photo. Newspapers and magazines are always looking for good photos.

Many groups now distribute their news releases by fax or e-mail. This is a useful strategy for late-breaking stories, or when you're up against a deadline. Of course, publications cannot use photos that arrive via fax, but may be able to use digitized images sent by e-mail.

When developing your mailing list for news releases, don't forget the "alternative" media: church bulletins, alumni magazines, community radio stations, newsletters from other non-profits, community access cable TV, professional and specialty journals, weekly/suburban/rural newspapers, etc. While it may be difficult to get a big feature story in your big daily paper, smaller news outlets are always looking for copy. If you choose carefully, you can use them to effectively reach your best audience.

2. Public service announcements. Also known as PSAs. For radio, you'll need a brief (10/20/30 second) summary of your event for the announcer to read on the air. Many radio stations prefer to receive your news release and write their own PSAs; check in advance.

If you have access to video production equipment, television stations will sometimes air pre-produced 15 or 30 second video PSAs. Again, you should check with local stations for specifications. Most cable TV services have "video bulletin boards" for which they accept PSA copy.

3. Press conference. A press conference is most appropriate when you have information that is controversial and timely, or if you wish to respond to a recent news event. If, for example, you just discovered a cure for AIDS, you might want to call a press conference. On the other hand, a public announcement about the beginning of your fundraising drive probably won't interest the media. There's nothing more depressing than a press conference no one attends, so don't organize one unless you've got something juicy.

Get a large room and set up a table where your spokespersons can be clearly seen and heard. If it's a really large room, and you organize lots of supporters to attend, you might need a microphone. Make a banner or sign with your organization's name to hang behind the speakers. Provide water and glasses for the speakers and the press. Set up chairs, but also leave room for TV cameras. Lots of handy electrical outlets will make life easier for the TV technicians.

Provide press packets — news release, organizational brochure or fact sheet, relevant documents — to all media personnel. Make sure your speakers are brief and to the point, and leave time for questions. Talk about the juicy stuff up front — most news crews have several stops to make before their work day is over. Try not to schedule your press conference on the same day as competing news stories: the President's inauguration, Hurricane Zelda hits Florida, the first day of the baseball strike.

If your information is site-specific, consider organizing a media tour. Call your press conference at the town dump, the abandoned house, the new art gallery, the inadequate day care center. Let the media know there will be "photo opportunities," then show them around. Newspapers and especially television news teams are always looking for stories with a visual component. If you want your event covered, make it as visual as you can.

4. Posters. Best for promoting an upcoming event. Keep costs down; if possible, arrange for design and/or printing to be donated. Keep the design simple, clear, and strong. Make sure the important information can be read at a distance. Brightly colored announcements will tend to attract more attention than those that are simply black and white.

When hanging posters, consider placement based on your target audience. If you have the money and want to blanket your town, commercial postering firms can help.

5. Flyers. The best way to get a person's attention is to put something in his or her hand. If you've got the volunteers, handing out flyers at public events (parades, concerts, ball games, etc.) is an excellent way to promote your upcoming activity.

To save printing costs, set up the flyers so they can be printed two or four to a page, then slice with a paper cutter. When choosing which events to flyer, target carefully. And don't be discouraged if most of them end up on the ground. Your goal is to find the people who will participate, and you'll have to sift through many who won't or can't.

6. Direct mail. Another good way to put information into their hands. Most organizations mail to their "house list" to notify members about upcoming activities. (Postcards, which are cheap to produce and mail, work well for this purpose.) If you are trying to broaden your base, consider other lists that might be available for an informational mailing. To really boost your results, wait a week and then follow up with phone calls.

7. Paid advertising. Proceed with caution. Advertising has a way of eating up your budget. If you are promoting a major public event, seek media sponsors to reduce your costs and stretch your advertising budget (see sidebar). Some publications offer a reduced rate for nonprofit customers. Classified advertising, used creatively, is effective and relatively inexpensive.

8. Billboards and bus posters. Surprisingly cheap and, if used creatively, can generate additional attention via media coverage. Some advocacy groups use these advertising strategies to influence public opinion, timing their purchases around key Congressional votes, etc.

9. E-mail and the internet. An awful lot of information — much of it useless and redundant — is delivered via e-mail. Indeed, networks and list servers exist for almost every issue and constituency. If you can find the appropriate ones for your group, use them. E-mail is quick and virtually free, but will be most effective as a complement to other strategies.

The potential for advertising on the World Wide Web is being tested by thousands of merchandisers, though very few have figured out how to make money doing it. If you have access to a Web site, use it. If you can set up a secure system for accepting donations via computer or selling tickets to your next benefit, do it. As with e-mail, use the Web as one small piece of your publicity campaign. It's still too soon to build a publicity campaign around a computer outreach strategy.

10. Other ideas. Be creative. You can use sandwich boards, murals, etc. Use your volunteers to hold signs from freeway overpasses or to spell out messages along the highway, Burma Shave-style. Set up a human alphabet chain at a football game and, on cue, spell out your message one letter at a time. Dress up in a gorilla suit or a Bob Dole (who?) costume. Hand out phony money with your group's ideas on the back. Once again, if you're clever enough and your timing is good, you can multiply your effectiveness by getting free media coverage of your promotional stunts.

None of this promotional work is quick or easy. It requires forethought and patience. But remember this:

- if you have a good story to tell, and
- you develop several strategies for telling it, and
- you implement those strategies with persistence — you will be heard. GFJ

Coming in Part Two: How to get better news coverage by thinking like a journalist.

Andy Robinson is a trainer and consultant in Tucson, Arizona. His book, Grassroots Grants: An Activist's Guide to Proposal Writing, *is available from Chardon Press. (See the order form on page 15.)*

Non-profits and government policies

A recent conference in Philadelphia explored the newest information, trends and strategies for action. Topics included upcoming anti-non-profit legislation; possible job legislation; pressure for payments in lieu of taxes; implementation of devolution with emphasis on experiences in Pennsylvania, Wisconsin and Massachusetts; and voices of protest from the Presidential Summit on Volunteerism.

Conference proceedings containing a wealth of knowledge, insight and ideas are available for $10 shipping and handling.

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How to Get Media Sponsorship for Your Next Benefit Event

When planning any type of community event, especially a fundraising benefit, it's useful to enlist the news media. Remember your goal: get the maximum exposure for the minimum cost and effort.

Media sponsorship involves an exchange: you allow sponsors to attach their company names to your event (and plaster their logos all over everything). In exchange, you get promotional considerations, which usually means free advertising. In the case of newspapers, it can also mean free (or inexpensive) printing of programs, tickets, etc. In the case of radio or television, sponsorship can involve live remote broadcasts, production and broadcast of public service announcements, etc.

Think creatively about how to develop partnerships with the news and entertainment business. A few suggestions:

Things to Do:

1. Do your homework first. Make sure your event fits within the format and demographics of the station or newspaper you're approaching. If you have questions, call in advance and ask.

2. Give yourself plenty of lead time. Approach the prospective sponsor at least 4–6 months before the event. Some major events start lining up sponsors 11 months in advance.

3. Make a specific request: how much air time or how many advertising inches, live remotes, PSA production, printing, promotional advice, etc. Put your proposal on paper, including your overall publicity plan. Make it simple and easy to read. Some radio and TV stations receive 50 requests each week, so you'll improve your odds by putting together a professional-looking package.

4. Joint sponsorship among TV, radio, and newspaper is appropriate, but don't involve more than one of each. They are competitors; most will want exclusive rights to the event within their respective medium.

5. Don't rely only on the station's promotions director; advertising sales staff can help, too. For example, if you plan to sell soft drinks, one of the ad sales staff at the station might be willing to approach a local beverage distributor and ask them to come in as an additional sponsor. The distributor then sells sodas at your event, makes a donation (or gives a percentage of sales) to your organization, and promotes your event in their regular paid advertising.

Things not to Do:

1. Don't rely solely on press releases and PSAs to get the word out. Some radio and TV stations rarely use them, or will use them at low-impact hours (for example, 3 AM).

2. Don't be disorganized, unprofessional, or late. If you're not sure what you're doing, ask for advice.

Book Reviews

Strategic Planning Workbook for Nonprofit Organizations, Revised and Updated

by Bryan Barry, Amherst H. Wilder Foundation

Strategic Planning Workbook for Nonprofit Organizations, Revised and Updated provides step-by-step guidance for developing a realistic plan for the future. With increasing economic, societal, technological and political changes, a solid strategic plan gives nonprofits a sense of direction that will guide their choices about which opportunities to pursue and which to avoid.

Strategic Planning Workbook for Nonprofit Organizations, Revised and Updated guides organizations through five easy-to-follow planning steps. Reproducible worksheets help users develop the plan, involve others in the process, and measure results. Four planning methods show how to tailor the process to fit an organization's individual needs. Also included are: critical ingredients of a sound plan; strategies to address problems and opportunities; a new, more detailed sample of one nonprofit's strategic plan; and information on how multiple organizations, coalitions, and communities can use strategic planning.

Barbara Kibbe, Program Officer for Organizational Effectiveness at the David and Lucile Packard Foundation says, "The new and improved workbook keeps the best of the original — it remains simple to use without being simplistic...Relevant and responsive to the accelerated pace of change in the nonprofit sector. In short, this is an excellent resource."

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Successful Fundraising for Arts and Cultural Organizations, Second Edition

by Karen Brooks Hopkins and Carolyn Stolper Friedman

As federal support for the arts continues to decline, arts and cultural organizations must find new ways to raise the funds they need to survive. Now they can turn to *Successful Fundraising for Arts and Cultural Organizations* for expert advice.

Through a series of practical steps, the authors detail the mechanics of a successful fundraising campaign, including the roles of senior staff, volunteers, and board members in securing support from businesses, foundations, individuals and government agencies.

In the first new edition of this popular guide, originally published seven years ago, the authors offer important new insights into today's best fundraising strategies for arts and cultural organizations.

Included are in-depth examinations of corporate sponsorships, which are increasingly important as government funds wane, and a detailed chapter on endowment campaigns. All statistics and appendices have been updated and suggested examples, such as sample endowment pledge forms, campaign statements and sponsorship contracts are provided.

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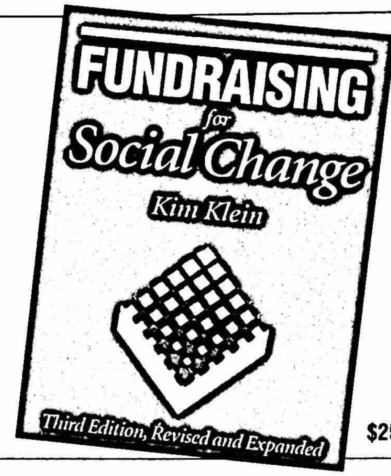

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