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innovative nonprofit SOLUTIONS

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Our Mission: We help organizations create innovative solutions to build their capacity.

We accomplish this by assessing, designing and implementing strategic fundraising, marketing and management programs for nonprofits, community-based, faith-based and educational institutions and government agencies nationally.

Message from our President



Whether you are just beginning to plan or implementing plans made in 2007, we encourage you to think strategy, creativity and diversity as we evaluate the current “*state of philanthropy.*” *How did you fare in 2007 and what will your challenges be in 2008?* How will our country’s current economic situation affect philanthropy? Communicating with my clients, partners, and peers, I continue to hear many questions and discussions on *strategic fund development, sustainability, capacity building, diversifying fund base, and marketing.* We’ve seen two important trends in the last ten years: an increase in the number of individual givers and an increase in the number of established charitable organizations in the USA (*over 1.4 million reported in 2006*). However, there are concerns of our country’s economic forecast and how that may impact donations for 2008, especially if donors choose to focus on using their donation dollars towards supporting political campaigns in this big election year.

Since its first issue in 2005, The INS Group has seen a steady increase in our newsletter subscriptions and has received very positive feedback about how our members are using ideas and resources from this newsletter to increase their capacity. We enthusiastically commit to helping you meet the challenges of 2008. In this issue we focus on some of the hottest topics for nonprofits: **1. Strategic Fund Development, 2. Defining Your Message, 3. Diversifying Your Fund Base, and 4. Collateral Materials.**

Use the Innovative Nonprofit Solutions E-Newsletter as your primary resource for information about strategic planning, fund development, grant writing, and research for nonprofits. What are some of the current celebrations and challenges in your organization? How has the information in our newsletter helped? Send comments to info@theinsgroup.com.

- Ruth A. Peebles, President and Founder, The INS Group

NCCADV Plans Strategically



Recently The INS Group spoke with Camilla Eubanks, Development Coordinator at the North Carolina Coalition Against Domestic Violence (NCCADV). With a vision to “*empower all North Carolina communities to build a society that prevents and eliminates domestic violence,*” planning strategically will be extremely important to their success. In 2006, Ruth Peebles was hired as one of the lead consultants for their Fundraising and Capacity Building Initiative and facilitated the development of the organization’s strategic fund development plan. In 2008, NCCADV continues to move forward in the implementation of their strategic fund development plan and diversification of their fund base. Below are excerpts from our very timely conversation with Camilla Eubanks.

INS: What is most challenging in fundraising and what will be the key to NCCADV’s fundraising success?

CE: As a fundraiser it is important not to have a “poverty” mentality or consistently operate in “crisis mode.” Fund development can be frustrating and as a development officer it is important to understand that getting stuck is part of the process and it is exciting to figure out new innovative ways to raise funds, specifically unrestricted funds. I’ve gone to fundraising meetings where discussions focused on the challenges of dealing with restricted funds and not being able to tap into those funds instead of focusing on finding innovative ways to fundraise. Like many organizations, a key issue for NCCADV to have fundraising success is having a board of directors that raises money as well as having buy-in from programmatic staff. We are lucky that the staff and our executive director support resource development work.

INS: Why is strategic fund development planning beneficial to your organization?

CE: Having a detailed outline and plan with dated expectations and outcomes along with transparency benefits any agency. Specifically, we will be able to keep accurate records and timelines of our fundraising efforts to improve upon annually. Having a strategic fund development plan will positively affect our fundraising goals as well as clearly identify what is working and not working for NCCADV.

INS: How is NCCADV diversifying its funding base and why is that important?

CE: After 25 years of being very grant heavy, we are in the beginning phases of unrestricted funds development. We see the potential of many options in diversifying NCCADV’s funding base such as developing our major gifts campaign, encouraging life long donors to be more invested, capital campaigns and planned giving, endowments, and partnering with giving circles. Diversifying our fund base is crucial to raise unrestricted funds so that we can increase statewide awareness of domestic violence issues and secure and support satellite offices in NC, and enhance our programmatic services such as our outreach services to the 92 domestic violence shelters in NC.

INS: How is NCCADV helping programs build their capacity?

CE: By modeling good fundraising behavior and sharing our success with local DV programs we demonstrate how programs can build their capacity. We also work very hard at the legislature to increase monies allotted to DV programs. We hope this effort can provide a staff person or staff time to devote to resource development. In **May 2008**, NCCADV will have our bi-annual conference, “*Building and Sustaining the Movement to Protect Families in NC*.” One of our conference tracks will relate to fundraising to help non-profit program managers develop the skills needed to ensure the long-term financial stability of their organizations.

Creating Successful Fundraising Events

1. Empower your own peers and volunteers

NCCADV’s annual *KC Bike Ride* was created to honor the life of Karen Crawford, a domestic violence victim whose friends wanted to collectively do something. NCCADV helped them to coordinate their resources, passion, and energy which resulted in raised funds of about \$15k for DV programs and 150 bikers participating.

2. Keep clear and detailed event records

Now in its 3rd year, NCCADV relies on past event information to help plan this year’s ride. Recreating the wheel most often takes more time and effort.

3. Plan at least 1 year in advance for a major event

It takes time to plan, coordinate, market, recruit, solicit sponsors, and create “a buzz” about your event.

A successful fundraising event should result in increased funds and increased awareness and support of your organization’s mission and work.

For more information about NCCADV, the KC Bike Ride, or how you can help prevent Domestic Violence visit:

www.nccadv.org.



How Diverse is Your Funding Base?

Identifying the Diversity...

The traditional image of a philanthropist (Caucasian, male, wealthy, and educated) is steadily changing as statistical information shows that there is more diversity in the pool of givers than was once recognized. “*New faces of strategic philanthropy*” are emerging in all categories of ethnicity/race, age, gender, and socio/economic. Factors such as motivation for giving, increase in new wealth, establishing a legacy, and a desire to influence the political, social, and economic outcomes of our country or other countries are also being influenced by the new faces of strategic philanthropy.

It is important to note that although these new faces of strategic philanthropy are now being recognized by a broader community, and most importantly by traditional philanthropy, they are not new to their communities. Their faces have been around for a long time and are familiar to those who have been the recipients of their philanthropy.

In President Bill Clinton’s book,

Giving, he highlights various philanthropists and philanthropic activities that may be considered by some as non-traditional. Today, in our country’s political arena, more candidates are spreading a strong message about citizens getting involved to help resolve the problems and issues of their communities by giving of their money, time, and talent. In recent years, we have seen a surge in individuals and groups supporting organizations and efforts responding to national and international natural disasters such as the 2005 Hurricane Katrina, 2007 wildfires in California, and the 2004 Tsunami affecting 11 southeast Asian countries.

Who are these “new faces?”

Ethnicity and Race:

Philanthropists from the African-American, Hispanic/Latino, Asian, and Native American cultures and communities are individually and collectively becoming more involved and strategic in their giving. The focus on “taking back their communities” and specifically addressing issues of importance in their communities drives their action to give not only money, but also their time and talent.

Age: Baby boomers, Generation Xers, and Generation Yers are undoubtedly influencing philanthropy because of their expectations to address big issues, to act more quickly on addressing those issues, and to have positive outcomes and results. Youth are getting more involved and are influencing their parents to support the causes important to them.

Gender: Women usually seen as the “volunteers” of their communities are not just making brownies for the bake sale, but are calling on their networks to open their checkbooks and join a collective giving pool.

Socio/Economic: Entrepreneurs and the “New Money” wealth creators are bringing recently acquired large dollars to the table and bringing creativity and innovation to philanthropy by incorporating entrepreneurial thinking.

Individuals and Groups: Large individual donors (Bill Gates, Warren Buffet, Oprah Winfrey, etc.) have had significant impact and so have Giving Circles, the coming together of individuals for the common goal of pooling resources of money, time, talent, and

Learn More about Diversity of Givers

Asian Americans/Pacific Islanders in Philanthropy
www.aapip.org

Hispanics in Philanthropy
www.hiponline.org

Native Americans in Philanthropy
www.nativephilanthropy.org

National Black United Fund
<http://www.nbuf.org>

National Center for Black Philanthropy
www.ncfbp.net

Women's Philanthropy Institute (WPI)
<http://www.philanthropy.iupui.edu/PhilanthropicServices/WPI/>

Youth in Philanthropy
http://foundationcenter.org/focus/youth/kids_teens/youth_getinvolved.html

Visit our
Workshop Calendar at
www.theinsgroup.com
for the next
Grant Writing or
Fundraising workshops
in your area!

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Defining and Communicating Your Message

As your fund and support base diversifies and grows, it will be even more important that your message is clearly defined and communicated. It is also important to take note there may be more non profits doing the same or similar work as your organization than when your organization first opened its doors. If this is the case, clients who need your services and programs and donors who might want to contribute to your organization realize they have more than options. They have an opportunity to shop around. And not every donor will give because they feel sympathetic or passionate to your cause. More than ever, donors today are also donating because they want to see positive change and they want to be part of something big. The bottom line is the bottom line - they want to see results from their giving.

Defining Your Message

There are different strategies on defining your message. Some would suggest having a broader

scope to capture a broader audience and others would suggest having a specific scope to address your target market and then grow from that target. It is important that everyone in your organization is clear on your message. Let's look at the beverage industries top two brands, Pepsi and Coke. Their message is clear – drink soda. They may package the message differently based on their audience, but the message remains the same. They don't just say "drink soda" but they communicate how you might feel if you drink their soda or how you may be perceived when drinking their soda. Maybe you will feel like you are part of, "a new generation," or maybe it tells people that you are "the real thing."

Communicating Your Message

Language – Must make sense to the listener or reader. What can you say or write that connects to what is important to them.

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INS on the Road and in the Air Washington, DC

In October 2007, The INS Group President, Ruth Peebles, was invited to Washington, DC, to speak to The Breakfast Club, established in 2005 is a professional group that meets monthly to invest in and develop African-American businesses; improve African- American communities, including affordable housing and youth programs; and bring African-Americans together in order to spread financial strength throughout our communities.

The audience included representatives from local, national and international nonprofits, attorneys, and business leaders.

Ruth shared her message of how strategic philanthropy can be a business success tool. Her presentation answered questions such as how the words profitability and social cause can go hand-in-hand and how businesses are realizing that consumers like to buy from businesses connected with a social cause. Ruth also informed the group on trailblazing nonprofit organizations who are adopting an entrepreneurial approach to addressing social challenges. Because of her experience as a business owner and philanthropist, Ruth explained how stronger partnerships between nonprofits and for-profits are influencing the evolving field of philanthropy.

The presentation was well-received and resulted in an increased interest on learning more about strategic philanthropy, especially in creating giving circles.



Do You Know The First Step To Successfully Securing A Grant?

Find out by listening to our *12 Steps for Successfully Securing a Grant* CD.

This effective grant writing learning tool is now available for only \$10.

Visit www.theinsgroup.com to order your CD today!

"The INS Group's CD, 12 Steps for Successfully Securing a Grant, is a great learning tool that gives practical and effective guidance on how to write a grant that will lead to successful outcomes. After attending an INS Group workshop, this was the perfect tool to reinforce what I learned. It was helpful to have this tool to share with peers that were not able to attend the workshop.

Linsey Mills
Games for Life Institute
Winston-Salem, NC

Defining Your Message *Continued from Page 4*

Effective use of language can paint a picture for your audience. Create the picture by using words that your audience understands. Don't use "industry speak," and acronyms that are unique to your organization or cause unless communicating to those in your industry. Saying, "...our programs have been most helpful to kids with OCDs..." may mean nothing to a donor but may mean something to a parent with a child who has OCD (obsessive-compulsive disorder) because they are familiar with the acronym.

Your Mission is Your Message – If your mission statement is clear, your message will be clear. The beginning of a new year is a great time to step back, look at the language of your mission statement, and to assess if your organization is being true to its mission. It is a good time to decide how, when, and where your message will be communicated. The core of your message needs to be constant but the language you use to connect with people needs to be different based on your audience, time of year, current needs,

current trends, news, etc. Sample message: *Education is important.* Would you communicate your message using the same language for parents, educators, politicians, to those who need or want education, or those who will donate and support education programs? To be effective you have to use language that connects with your audience. For example, parents want to know how their child will be helped. They want to know their hard work will pay to provide for their children to have opportunities they didn't have. Everyone wants to know how their support and participation in this project or cause will pay off. What will be the end result and can their money, time, and talent really make a difference?

Fresh – Every year should bring an opportunity for you to re-introduce or introduce your organization to your city, state, or region. One of the biggest mistakes is to think, "Oh everyone knows who we are and what we do." Ask Pepsi or Coke why they spend so much on marketing and advertising. By now, doesn't everyone know their name, brand, and products?

People and situations change. New people are moving into

your community, city, and state. Persons who didn't donate last year may this year because their lives or financial situations have changed.

Is Your Organization Impoverished or Empowered?

It is your job to clearly define and effectively communicate your message. Are you communicating a message of impoverishment or empowerment? Does your community see your organization as impoverished, always in crisis mode and just scraping by? What does this tell your community about your ability to be effective? If you are not able to keep the lights on how can you really help those who you committed to serving in your mission.

Does your community see an organization that is empowered, that has planned and acted effectively in carrying out your mission and can respond to crisis without desperation but with an attitude of "we can get through this." Are you an organization that people want to be part of?

But isn't this article about defining your message? The saying is, "Actions speak louder than words." What you say and do, how you respond, and how you build relationships are all actions that define and communicate why your community should support you, use your services, and be part of your cause.



**Updated
PACI
2006**

A November 19, 2007 press release issued by The IRS reminds 501(c) (3) organizations "that federal law prohibits them from becoming directly or indirectly involved in campaigns of political candidates."

The 2004 Political Activity Compliance Initiative (PACI) examined 110 cases.

With the extended presidential campaigning it is important to note the types of political intervention determined:

1. Distribution of diverse printed materials encouraging members to vote for a candidate.
2. Religious leaders using the pulpit to endorse or oppose a candidate
3. Endorsing or opposing a candidate on their website or through links to another website
4. Disseminating voter guides or candidate ratings that encourage readers to vote for candidates
5. Placing signs on property showing support to a candidate
6. Giving improper preferential treatment to candidates by permitting them to speak at functions
7. Making cash contributions to a candidate's political campaign

Source: [News Release](#) and [Fact Sheet 2006-17](#)

Diverse Funding Base *Continued from Page 3*

networks to address issues and to have short-term and long-term impact.

What influences their giving?

The old money establishments created the wealth for traditional philanthropy in the United States and helped to create huge foundations such as the Ford Foundation and the Kellogg Foundation. These foundations were created to help the fellow

man and to also influence the socio-economic, political, and educational issues of their day. Today's new money philanthropists are very similar in their motivations. However their expectations of outcomes and results as well as their level of engagement with the organization have increased as they bring both their professional and personal experiences to the table. New money givers such as Bill &

Melinda Gates and Oprah Winfrey are prime examples of philanthropists who are very strategic in their philanthropy and have been extremely influential especially in education. Maybe not as wealthy and influential but there is a diverse pool of givers in your community who either individually or through collective giving are looking to be part of a cause.



Nonprofit Trivia:

Which team is the only community-owned, non-profit organization in the NFL?

The first person to email the correct reply to info@theinsgroup.com will receive a free copy of 12 Steps for Successfully Securing a Grant CD.

Please type "Nonprofit Trivia" in the subject line.

Are Your Collateral Materials Working For You?

Collateral materials are marketing pieces that can work for you 24 hours a day. Specifically they act as promotional pieces that can come in various formats which include brochures, cards, displays, posters, fact sheets, and white papers. They can be used as on-going marketing for your organization or designed for use in promoting special fundraising events and campaigns. Unlike marketing that is distributed through mass media, collateral materials are pieces that are distributed directly to your clients, members, volunteers, and donors.

Collateral materials allow you to tell your story with

words and images.

Annual evaluations of your collateral materials are important to ensure that you have effective materials. Keeping a record of which materials were most effective can help you best determine where to spend your money and if you need to increase your distribution.

Setting guidelines for the creation, cost, and distribution of your collateral materials will help you from wasting money and spending time on trying to recreate the wheel. Especially if you have more than one location, several departments or programs a *collateral materials design team* (made of staff from different areas of your organization or

volunteers) will help to keep your logo placement, colors, images, and message consistent. You can have effective materials that don't break your budget.

Beyond printed materials, using audio & video as part of your collateral materials will make it come alive. Electronic tools and mediums such as pod-casts and web-video are increasingly used to get and share information.

Distribute, Distribute, Distribute because collateral materials can't go to work for you if they are stored in a box in the corner collecting dust. Have a schedule for getting your collateral materials into the hands of potential clients, members, volunteers, and donors.



Still have questions about collateral materials?

Contact The INS Group today to learn more strategies on:

- Evaluating your current Collateral Materials
- Collateral Material Resources
- Effective and Inexpensive Collateral Materials

Send us an e-mail to info@theinsgroup.com or call us at 919-231-2870

We will contact you personally to help assess your organization's current need.