



PENNSYLVANIA NONPROFIT CONGRESS
THE STATE CAPITOL BUILDING – HARRISBURG, PA
APRIL 17, 2008

ADVOCACY SESSION RESULTS

OVERVIEW

The Advocacy Workgroup of the Pennsylvania Nonprofit Congress was facilitated by Don Kramer, Esq. of Montgomery, McCracken, Walker and Rhodes and Kayte Connelly, CCP of Best Principled Solutions, LLC. 36 delegates participated by identifying advocacy priorities (in the form of realistic action steps) for the sector in addition to outlining the most promising solutions for this category among nonprofits throughout the Commonwealth.

ACTION STEPS

The workgroup identified the following action steps as key to improving advocacy efforts throughout the nonprofit sector. These action steps were presented to the Afternoon Nonprofit Congress General Assembly by Don Kramer.

KEY FINDINGS

- Introduce legislation to raise the lobbying disclosure threshold for 501(c)(3) nonprofit organizations.
- Engage in Budget Advocacy on behalf of the sector
- Oppose PA SB1328 bill to limit property tax exemptions for 501(c)(3) nonprofits with land, buildings or real property.
- Promote US HR2020 – bill to increase the charitable mileage rate from 14 cents to the business.
- Enhance networking, issues sharing and relationship building
- Improve media efforts
- Using technology to advance advocacy efforts
- Holding legislators accountable, more awareness of federal effect on local
- Need funding to support policy efforts

ADDITIONAL FINDINGS

The process of developing five strategic action steps included hours of discussion on the various topics affecting advocacy in nonprofit organizations. Many challenges and ideas were considered, while narrowing the list to only five key steps. Below, we have included the many other considerations voiced during the advocacy session.

Collaboration

- Sitting on different boards
- Maintaining relationships (with other nonprofits, government officials, agency staff, media and leaders from the private sector)
- Holding press conferences and webinars to publicize advocacy efforts on behalf of the sector
- Attending networking events and sessions

Communication & Honesty

- Agree to disagree
- Understand your opponents and their point of view so you are better prepared to react to *their* advocacy efforts with compelling arguments for yours
- Establish and maintain open relationships like-minded organizations and those who may affect change on issues important to your mission and/or the sector
- Work closely with the communications staff of your organization, establishing focused messaging around your advocacy efforts to increase public awareness
 - Encourage a better understanding about nonprofits and what they do
- Recognize the importance of partnering at a high level (senate)

Youth participation

- Engage your board & give them materials, network, issues
- Utilize interns and younger volunteers to create a loyalty market among impassioned youth, helping to build the next generation of nonprofit leaders

Technology

- Utilize tools to get people involved
 - List serves
 - Blogs
 - Online advocacy tools

Leadership & Vision

- Practice more successful collaborations
- *Slow down* and find out what's going on around you

Question 2 -

- Group 2
 - Barriers - Lingering things – smaller organizations are worried but then choose to do nothing about it.
 - Solutions: www.dos.state.pa.us.
- Group 4
 - Barriers - lack of knowledge and/or resources to use that knowledge.
 - Solutions: developing ongoing relationships with legislators. (a solution)
- Group 3
 - Barriers - Nonprofits are generally working on overload already. There is no time left to contact people, members, peers.
 - Solutions - Educating community, provide access to community to help learn about you, network with other nonprofits
- Group 5
 - Barriers - Cultural/language
 - Solutions - Education – make charitable mission aware, empowering corporate & partner with for-profits, fighting battles at local levels
- Group 6
 - Barriers - Apathy – people wrapped in their own world, economy, society = external worries
 - Solutions - Start young (h.s./m.s.) get them into nonprofits at a young age (shadowing & service projects)

Specific Items for Nonprofit Agenda

Discussion on Current Bills:

- Lobbying Disclosure
- Mileage Reimbursement

NCNA Potential Collaboration

11 votes – Technology software, list servs, advocacy tools

11 votes – Holding legislators accountable

8 votes – networking

7 votes – using all media resources effectively

7 votes – funding, funding, funding

6 votes – more awareness of federal effect on local

5 votes – national campaign for negative perception

5 votes – involving constituency and boards

5 votes – community networking

5 votes – simplify message for communication

4 votes – put face to issue

2 votes – community involvement

2 votes – issues sharing

1 vote – group discounts for software

1 vote – relationship building

1 vote – media

1 vote – providing materials/resources

Additional Topics Discussed

Communication

Honesty

Agree to disagree

Process for conflict resolution

Know thy enemy

Commraderic outlets

Many hands make light work

When-timing

Broader net

Planning long-term goals

National partners – resource

National repository

Tabor campaign success

Rethinking integrative approach

Stronger voice

Leadership

Vision

Slow down

World/global perspective of what's happening

Lobbying Disclosure

- Barriers
 - Confusing/conflicting roles & requirements
 - Funding, staff, resources

- Spending on understanding
- Existing variances on reporting
- Can't pass cost on to those we serve
- Clarity on requirements & more thorough resources
- Solutions
 - Higher thresholds
 - More funding, staff, resources
 - Education
 - Collaboration at planning stage
 - Smaller organization exemptions (might be achieved with higher threshold)
 - Community education
 - Exempt on public records – statutory amendment

Engaging Community

- Barriers
 - Names on lobbying report
 - Fear/boundaries/limiting beliefs
 - No test cases
 - Lack of resources
 - Overload
 - Time
 - Cultural competence
 - Language
 - Apathy-global economy/perspective
 - Societal values
- Solutions
 - 14 votes – quantifying our economic impact
 - 13 votes – raise lobbying threshold ? 5000
 - 8 votes – developing ongoing relationships with legislators
 - 7 votes – lobby on HB2020 (mileage reimbursement)
 - 7 votes – expand load forgiveness
 - 7 votes – charitable state deductions for volunteerism activities
 - 4 votes – educating community/awareness & access for organizations
 - 3 votes – capacity building appropriations
 - 2 votes – exemption from state income tax to counter lack of keeping up with col
 - 2 votes – recruit and retain excellent staff
 - 2 votes – voter registration
 - 2 votes – common application for grants
 - 1 vote – money initiatives
 - 1 vote – spend stimulus checks on nonprofits
 - 1 vote – start young, engage youth early on

Additional Topics Covered

Advisories on web
 Publishing handbook
 More money
 Engaging community
 Networking
 Local filter up

Empower corporate partners
Professional service exemption
Capacity building line item
PANO advocating budgetary issues
Access to tax exempt bond pools
Need more statistics collected
Economic league and PANO and founders
Multi-functional purpose – advocacy & awareness
Take federal law and broaden it

Delegates in the Advocacy Session

Diane Moyer – Pa Coalition Against Rape
Peggy Dolan – Kelly Anne Dolan Memorial Fund
Mary Young – Association of Independent Colleges & Universities
Ryan Lindsey – Arthritis Foundation
Anne Leisure – PCPA
Maureen Murphy – Child Care Consultants Inc.
Susan Roberts – American Cancer Society
Jenny, Bob, Steve Noel – Winkin and Associates
Marianne Bellesorte – Pathways PA
Jill Troutman – Girl Scouts in the Heart of PA
Jane Schwab – Girl Scouts in the Heart of PA
Jeanette Archer-Simmons – Girl Scouts in the Heart of PA
Bev Miller – Girl Scouts in the Heart of PA
Laura Solomon
Ellen Kyzer – The Foundation for Enhancing Communities
Alex Dow – Greater Pittsburgh Literacy Council
Mike Rifton – Mech. Mercer & Assoc.
Victoria Connor – American Red Cross
Mike Cherewka
Christopher Book – Paxton Ministries
Winnie Atterbury



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CAPACITY BUILDING SESSION RESULTS

OVERVIEW

The Capacity Building Workgroup of the Pennsylvania Nonprofit Congress was facilitated by Tish Mogan of the Pennsylvania Association of Nonprofit Organizations and Lou Beccaria of the Phoenixville Community Health Foundation. 38 delegates participated by identifying capacity building priorities (in the form of realistic action steps) for the sector in addition to outlining the most promising solutions for this category among nonprofits throughout the Commonwealth.

ACTION STEPS

The workgroup identified the following five action steps as key to improving capacity building throughout the nonprofit sector. These action steps were presented to the Afternoon Nonprofit Congress General Assembly by Tish Mogan.

1. To focus on the beneficial roles of the sector, we recommend that the name be changed from the “Nonprofit Sector” to either:
 - a. Public Benefit Sector
 - b. Social Benefit Sector
2. Expand existing tax credit to include all nonprofit organizations
3. Promote the Nonprofit Sector through pro bono Ad Council and strategic sector-wide marketing
 - a. Annual nonprofit day – to promote the interests of nonprofits throughout the commonwealth and continue public awareness and capacity building
 - b. Marketing tool kit for nonprofit organizations including a resource manual with best practices and listings for nonprofit-friendly consultants and marketing agencies
4. Develop and implement an Executive Director Standards Certificate Program and criteria along with an administrative toolkit for nonprofit executives
5. Develop and maintain a centralized resource center for nonprofit organizations, pooling resources from across the commonwealth and streamlining the education process for staff just entering the sector, or attempting to employ new tactics within their organization

ADDITIONAL FINDINGS

The process of developing five strategic action steps included hours of discussion on the various topics affecting Capacity Building in nonprofit organizations. Many challenges and ideas were considered, while narrowing the list to only five key steps. Below, we have included the many other considerations voiced during the capacity building session.

- **Funding/Resources**
 - Explore alternative revenue streams, focus on individual giving (building relationships) and entrepreneurial thinking

- Establish funder/grantee dialogue about benchmarks, responsiveness to communities' needs
- Advocate for funding operations
- Create more intern volunteer opportunities (e.g. www.jerseyintern.org)
- Encourage funder support of certification
- Watch "Grant Junkies"
- Create "shadow days" for career exploration in nonprofits
- Look for other non-financial assistance from funders
- Allow and encourage funders to help nonprofits know where they need help
- Develop a SCORE-type volunteer group; seek legislative funding for this
- Address costly reporting requirements for funders
- **Collaboration**
 - Create a definition for shared resources and revenues
 - Collaborative focus should be placed on
 - Sharing service delivery
 - Purchase of business services (e.g. human resources, public relations, information technology, etc), shared office space and resources
 - Avoid stealing consumers from each other
 - Create economies of scale
 - Develop networks of grantees to create better economies of scale
 - Create well-structured collaboration tool
 - Seek grants for combined purchase of services
 - We shouldn't have to worry about shared philosophies, because we can still come together to achieve common purposes (e.g. Chamber of Commerce model)
 - Continue to focus on mergers, coalitions and task forces
 - Continue to explore public/private partnerships
 - Create online member directory of: all members, administration, business leaders, lobbyists and providers willing to collaborate
- **Public Awareness with respect to capacity building**
 - Educate general public to what is needed to run programs
 - Create "*A Day in the Life WITHOUT Nonprofits*" campaign
 - More press releases needed for the work we do
 - Create an "I Work for a Nonprofit" button to wear for a year to show how many people are employed by nonprofits
 - Change perception that only volunteers work for nonprofits; "Charity Mentality" pervades
 - Identifying the organization as a good "investment"
 - Need for better marketing skills and research
 - More emphasis on PANO SFX
- **Governance**
 - Identified a potential need for:
 - Increased skill building
 - Board selection training
 - Board capacity building
 - More board members needed who are experienced in the field specific to the mission, have organizational skills and a commitment to feel ownership of the organization
 - Address issues of board contributions and attendance
 - Actively focus on diversity

- **Other**

- Need more strategic and financial planning skills
- Promote better nonprofit/government/ relationships – better exchange of information on programs between federal, state and local governments and the non profit sector
- Promote a common data project (Pew Charitable Trust)



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LEADERSHIP SESSION RESULTS

OVERVIEW

The Leadership session of the Pennsylvania Nonprofit Congress was facilitated by Tim Whelan of The United Way and Nicole Molinaro of Communities in Schools. 50 delegates participated by identifying leadership priorities (in the form of realistic action steps) for the sector in addition to outlining the greatest barriers and most promising solutions for this category among nonprofits throughout the Commonwealth.

ACTION STEPS

The caucus identified the following action steps as key to improving leadership activities and efforts throughout the nonprofit sector. These action steps were presented to the Afternoon Nonprofit Congress General Assembly by Tim Whelan.

ADDITIONAL FINDINGS

The process of developing strategic action steps included hours of discussion on the various topics affecting leadership in nonprofit organizations. Many challenges and ideas were considered. Below, we have included the many other considerations voiced during the session.

1. EDUCATION - *Provide greater training for current nonprofit employees, boards, & volunteers*

a. *General Discussion Topics*

- i. nonprofit sabbatical programs
- ii. business sector has research & development budget, nonprofits tend to not plan money for this
- iii. for a full day board meeting, have an hour dedicated to board training
- iv. uneducated board members are not useful - legal obligations
- v. raise the bar for board members
- vi. great training does exist in PANO
- vii. affordable/accessible training

b. *Top Ideas*

- i. create knowledge archives on web & intranet
- ii. actively look for new resources
- iii. set & use guidelines & best practices for boards
- iv. set expectations - change mindset about training for entire organization
- v. have value-driven training

c. *Other Ideas*

- i. increase marketing of training programs
- ii. create flexible & accommodating schedules - webinars & online courses
- iii. institutionalize need for training in organization – have mandatory training at all levels
- iv. mandate & plan for training
- v. invest in all staff, not just upper management
- vi. increase mentoring among all staff, board, volunteers

- vii. acknowledge & utilize websites
- viii. expose individuals to new environments – go on trips
- ix. enhance existing college programs
- x. gain college credit for PANO training
- xi. internships are great resource
- xii. spend time away from organization – sabbatical programs
- xiii. use some time at board meeting for training
- xiv. create & use job descriptions & manuals
- xv. increase commitment & collaborative training throughout region

2. DEVELOPMENT - *Create mentoring programs to attract & development young leaders/succession plans*

a. *General Discussion Topics*

- i. starting education early to try to prevent wrong impressions – high school programs?
- ii. undergraduate programs in nonprofit work, not just graduate degrees
- iii. succession planning should be started before it is necessary
- iv. founder/CEO
- v. what to do when they leave?
- vi. what to do when they won't leave?
- vii. succession planning is necessary for any long-term staff member, not just for founder/CEO/upper-level management
- viii. keep all 'institutionalized knowledge'
- ix. resources do exist - a matter of finding it
- x. CEOs should have succession plan from Day 1
- xi. generation gap exists, so make plans to deal with it
- xii. younger workers are often not looking for long-term commitment
 - 1. looking to gain skills from new job for a few years, then move on
 - 2. does not mean employees will not be dedicated or hard working

b. *Top Ideas*

- i. use board committees to engage new, young leaders
- ii. create young nonprofit leader networks – training, board matching, mentoring
- iii. be open – learn what the younger generation needs & wants
- iv. be flexible in working around commitments of younger generation
- v. create relationships among young workers

c. *Other Ideas*

- i. advocate with donors the need to improve salary structure
- ii. create youth advocacy committee
- iii. interest students while still in school
- iv. use internship programs
- v. start mentoring programs early
- vi. train board members in how to mentor
- vii. train for stepping stones, not long term careers

3. PLANNING - *Comprehensive strategic planning which includes finance, fundraising, marketing, & governance*

a. *General Discussion Topics*

- i. very often, assumptions used in making budget will not be valid a few months later
- ii. nonprofit sector not agile enough
- iii. board members, staff, & volunteers should know what strategic plan is
- iv. group should be willing to ask for help – create an organizational culture
- v. nothing wrong with asking for help for financial planning

b. *Top Ideas*

- i. involve all players in organization
- ii. strategic plan should be a living document
- iii. create a tracking system for accountability
- iv. involve stakeholders – gain sense of issues, measure success of goals, analyze performance

c. *Other Ideas*

- i. ensure organizational cohesiveness
- ii. have strong facilitator, have right facilitator – use outside consultant if necessary
- iii. ask for help – PANO, chamber of commerce, etc
- iv. brainstorm for strategic plan as if money was not a constraint
- v. go over strategic plan often at meetings
- vi. create short term & long term goals
- vii. ensure accountability
- viii. be willing to look at nontraditional methods – free software available for most applications
- ix. have a clear vision
- x. dedicate time & money to create a good strategic plan
- xi. incorporate strategic plan into organizational culture
- xii. create organizational circle – every employee has annual work plan that ties into organizational work plan

4. PERFORMANCE - Raise the bar relative to performance expectations

a. *General Discussion Topics*

- i. accountability is very important
- ii. difficult to get people/organization to change
- iii. performance expectations should be imbedded in culture
- iv. lead by example
- v. sector is almost paralyzed with researching all possible problems before anything gets done – death by committee
- vi. although money is very important, it shouldn't be the first thought – viability of potential projects is more important than money

b. *Top Ideas*

- i. performance management should be tied into rewards & strategic goals
- ii. try to think differently – don't do something the same way & expect different results
- iii. boards – be more selective
- iv. have purpose for each member selected to board
- v. be selective & purposeful in what you do – you can't serve everybody

c. *Other Ideas*

- i. have potential board members as committee members first
- ii. set standards & live by them
- iii. be careful of who is selected to lead organization
- iv. take reasonable risks – sometimes failure must occur to learn anything
- v. view programs as programs, not use as potential profits
- vi. assign clients to one particular staff member
- vii. make mistakes, take risks, learn, and move on
- viii. create expectations of board members and hold accountable



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PUBLIC AWARENESS PRIORITY RESULTS

OVERVIEW

The Public Awareness session of the Pennsylvania Nonprofit Congress was facilitated by Diana Bucco of the Forbes Funds and Mike Sand of Sand Associates. 33 delegates participated by identifying public awareness priorities (in the form of realistic action steps) for the sector in addition to outlining the greatest barriers and most promising solutions for this category among nonprofits throughout the Commonwealth.

ACTION STEPS

The group identified the following five action steps as key to improving public awareness throughout the nonprofit sector. These action steps were presented to the Afternoon Nonprofit Congress General Assembly by Diana Bucco.

1. Identify similarities among organizations throughout the sector and develop initiatives that encourage and facilitate collaboration to meet common initiatives.
2. Develop an educational program for nonprofit administrators and communications specialists to fill the gap in education related to communications, the media and the many different outlets for communicating with the public.
 - a. This includes collaboration between private and nonprofit organizations to maximize resources leverage specialties across the sector
 - b. Building coalitions and collaborations that seek to promote like-minded initiatives
3. Develop relationships with public officials and leaders of local citizen organizations to help use public opinion to better advance nonprofit interests in policy debates
 - a. Grass roots marketing and tactics
 - b. Empowering the citizenry to act on issues important to the benefit of nonprofits' ability to help the constituents we serve
4. Embrace and promote change throughout our organizations and our communities to increase the ability for the nonprofit sector to have a voice as a valuable member of each community for which it serves.

ADDITIONAL FINDINGS

The process of developing five strategic action steps included hours of discussion on the various topics affecting public awareness in nonprofit organizations. Many challenges and ideas were considered, while narrowing the list to only five key steps. Below, we have included the many other considerations voiced during the break-out session.

Educating the public about the importance of the nonprofit sector within our communities

- Barriers
 - The mission isn't appreciated by the constituency
 - Lack of empowerment/resources/leadership
 - Skeptical public that doesn't understand the sector
 - The need of the media

- Nonprofits are not educated properly to handle the needs and process by which the media operates and requires
- Nonprofits don't fully understand the potential of public awareness through all mass media channels
- Solutions (in addition to the larger sector-wide action steps...)
 - Maintain focus on outcomes and don't lose sight of the public benefit
 - Develop smart collaboration to meet common initiatives
 - Develop public relations and marketing plans that make smart use of different verticals for peak impact (i.e. niche channels and mass media)
 - Focus on education, teaching what you are trying to accomplish through your mission. Educate the public so they can be better prepared to advocate or act on your behalf in the community
 - Maintain relationships with the media outlets and reporters that cover your beat
 - Build on your successes and learn from your experiences in order to better serve your needs in the future

Strengthening relationships between the nonprofit sector and the media

- Barriers
 - Lack of interest of the mainstream media in nonprofit sector
 - Insufficient staff education and resources
 - Lack of media relationships
 - Nonprofit staff turn-over and media outlet turn-over
 - Media agendas don't mesh w/ nonprofits
 - Unwillingness to invest in good media relations
- Solutions (in addition to the larger sector-wide action steps...)
 - Constantly immerse in news to provide relative expertise to hard news stories, creating thought-leaders within your organization
 - Education and staff training on how to deal with media and be effective storytellers
 - Focus on stories that can be used at anytime, so that media can insert them when space is available and they are short for stories
 - Utilize and mobilize community leaders as spokespeople for your mission
 - Build coalitions/collaborations to send messages
 - Pool resources to engage PR or Advertising Agencies and develop co-op advertising or contracts
 - Develop and maintain private and nonprofit partnerships to maximize media and public awareness

Increase the nonprofit sector's engagement in the public policy advocacy through public awareness

- Barriers
 - Legislative staff have a large number of nonprofits to react to. Requests for legislator participation in nonprofit initiatives is often put aside due to "busy schedules"
 - The lobbying/advocacy rules are a mystery to most nonprofit staffs. We do not have a good enough sense of what we can and cannot do with regards to advocacy
 - The nonprofit sector is hesitant to get involved in advocacy debates due to complicated lobbying rules and reporting requirements
 - Insufficient communication between nonprofits and local elected officials
- Solutions (in addition to the larger sector-wide action steps...)
 - Demystify lobbying and advocacy through grass-roots initiatives
 - Mobilize voters to marry their beliefs with your mission, rely on people power to advocate on your behalf
 - Form collaborations to work on advocacy issues together, rather than face the giant alone
 - Nonprofits need to find legislation to get behind and lobby effectively – use PANO as a resource
 - Find out and meet your local officials. Be informed and develop useful and valuable relationships

- Form committees of nonprofit, business and agency leaders to discuss legislative and advocacy issues. Use these committees to push agendas forward and support or rebuke proposed legislation as a larger voice.