LIVESTRONG
FOUNDATION

COMMUNITY TOOLKIT
RESOURCE GUIDE

The Community Toolkit provides you with information about best practices related to running a successful nonprofit.

SERVING PEOPLE AFFECTED BY CANCER

Do you run a cancer-related nonprofit? Our Community Toolkit provides you with information that can help you run an effective and extraordinary organization. This toolkit is intended to support nonprofits that currently have a 501(c)3 status and are interested in serving people affected by cancer.

Within the toolkit, you will find such chapters as "Understanding Grants," "Fundraising Successfully" and "Developing a Sustainability Plan." Each chapter provides general tips, information and resources. Some chapters have worksheets, samples or other interactive pieces that can be used to facilitate decision-making within your organization.

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SECTION 1: REVIEWING YOUR OPERATIONS

Part of running a successful organization is understanding and implementing an operational plan. The operational plan includes an effective mission statement, a strategic plan and a budget. It also includes methods to work with your board of directors as well as plans to train and support your staff and volunteer base. This section of the toolkit will help you to develop an effective operational plan for your organization.

Optimize Your Organizational Development

If your organization has recently established a nonprofit status, you may want to review your mission statement, maximize your use of the board of directors and understand the Internal Revenue Services (IRS) timelines you must follow to maintain a good standing.

Maximize Your Board of Directors, Staff, Volunteers and Constituents

Understanding the role of your board, staff, volunteers and constituents is necessary. However, it's also important for each of these roles to understand each other and how to interact together.

Reviewing Your Operations

Optimize Your Organizational Development

REVIEW YOUR MISSION STATEMENT

A mission statement should be a clear, concise statement about your organization. It should say who your agency is, including the name and that it is a nonprofit organization. The mission statement should also define the type of agency it is, including what you do and who you serve. It does not need to say anything else.

- A good mission statement provides strategic vision and direction for the organization. It should not have to be revised every few years.
- Revise the mission statement only when it is no longer appropriate or relevant to your organization. Your mission should not be revised to fit your programmatic efforts. Inversely, your programmatic efforts should be chosen based on your mission statement.
- Your mission statement should be short, visible and easily remembered. Using mission statements on business cards, letterheads and ongoing reporting is the key to reminding stakeholders why your organization exists.

CREATE YOUR STRATEGIC PLAN

Your organizational strategic plan should include short and long-term goals as well as strategies or activities to reach these goals, including indicators of success and target dates. Strategic planning determines where your organization will go over the next one to five years and includes a variety of organizational perspectives, resources and tools. Engage your board, staff and/or constituents in the development of your long-term strategy for the success of your organization. A clear strategic plan will establish why your organization is best qualified to meet those long-term goals and its plans to get there. Benefits include a clearly defined plan, organizational buy-in, communicating goals to constituents and providing a baseline of information for evaluation and review.

Review the following questions to establish your own strategic plan.

- *How easy will it be to recognize and document program success when it emerges?*
- *Has the program ever been evaluated? If so, what were the findings and how were they used?*
- *Is it feasible to assume that the program will survive beyond funding cycles you receive?*
- *What are the long-term plans for program continuance?*
- *What are program threats?*

Reviewing Your Operations

Optimize Your Organizational Development

FOLLOW INTERNAL REVENUE SERVICES TIMELINES

There are many details related to the IRS and the timelines and filing deadlines for different events within your 501(c)3. Always check with the IRS for specific information and deadlines. Some of these may include issues related to:

- Starting out with organizing documents, bylaws and Employer Identification Numbers (EIN)
- Application to the IRS
- Ongoing compliance with employment taxes, disclosure statements and charitable contributions
- Significant events such as audits
- Information about the Advance Ruling Period as listed by your Determination Letter

Always maintain information related to your tax status. Keep updated letters and copies as you will often be asked for these when soliciting donations and/or applying for grants. Understand the standards that the Better Business Bureau Wise Giving Alliance uses to rate charity and nonprofit organizations. These include standards related to your financial status as well as to the involvement and meetings of your board members.

PLAN YOUR ORGANIZATIONAL BUDGET

Money obviously plays an important role in your success as a nonprofit organization. This includes raising money and using it properly. This section gives you an overview on how to define your sources of income and how to create an organizational budget. There are also resources to provide you with further assistance and information.

Define your sources of income and expenses. You will want to ask yourself these key questions about your organizational practices:

- Are you going to charge anything for your services? If so, what are the pros and cons of charging? Will it limit people accessing your services?
- What are the historical “best practices” for similar programs?
- Using your community needs assessment, what is a realistic amount for the population you are serving to pay?

Determine what revenue sources you can expect. This may include:

- Grants
- Events
- Sponsors
- Individual donations
- General fundrasing
- Other development efforts (cause marketing, endowments)
- Fees / memberships
- Pro-bono / donated services, equipment or materials

Expenses might include:

- Staff salaries and benefits
- Building fees, including rent, maintenance and utilities
- General overhead, including maintenance of computer equipment
- Printing and shipping costs for collateral pieces
- Event costs such as rental of facility and food
- Travel costs, if necessary
- Consultants, if necessary
- Website domain usage and maintenance
- Fixed vs. variable costs

Reviewing Your Operations

Optimize Your Organizational Development

Be sure to figure out what percentage and amounts you anticipate annually to cover your expenses. A common suggestion is to underestimate your expected revenues and to overestimate your expenses. Tailor your padding based on your organization and its needs.

PLAN YOUR ORGANIZATIONAL BUDGET

(continued)

In order to determine how much revenue you will need, make a list of all your anticipated expenses.

Be sure to distinguish between accrued and cash basis revenue and which accounting forms you plan to use. For example, a $50,000 pledge in year one, payable in equal installments over five years, is typically reported as $50,000 of revenue in year one. In this scenario however, only $10,000 is expected to be received in cash in year one. Once you have established more sustainability, you will have a better idea of how to anticipate these income flows in the future.

In order to be knowledgeable about your revenues and expenses, you will need to track your budget. To do this you should:

- Get a good software program and learn how to use it.
- Identify one key staff member (or accounting team) to track your revenues and expenses. If possible, seek out a board member with auditing or accounting experience.
- Keep accurate account by saving receipts for purchases and copies of invoices for payments.
- Establish policies and procedures that all staff can follow to make the process smooth and user-friendly.
- Use your time wisely to find out the best use of your money. It can be time-consuming to get a number of different bids and quotes for services, but it might save you money in the long run. Just make sure that the time spent is realistic and necessary.
- Create banking relationships with bankers who have a familiarity with nonprofit needs. Ask for reduced bank fees and interest rates on lines of credit.
- Become familiar with the Federal Government's regulations regarding audits, expenditures and charitable contributions.

The following are publications created by the Federal Government:

- Office of Management and Budget (OMB) Circular A-110: Uniform Administrative Requirements for Grants and Agreements
- OMB Circular A-122: Cost Principles for Nonprofit Organizations
- OMB Circular A-133: Audits of States, Local Governments and Nonprofit Organizations
- IRS Publication 526: Charitable Contributions

Reviewing Your Operations

Optimize Your Organizational Development

While developing your annual report of your organizational activities, it is important to include the following:

- *Highlights from the year*
- *Financial statements*
- *Accompanying charts*
- *Letters from key leadership*
    - *Founder*
    - *President*
    - *CEO*
- *Special Thanks*
    - *Major donors*
    - *Sponsors*
    - *Board of directors*
    - *In-kind donors*
    - *Individual donors*

DEVELOP AN ANNUAL REPORT

Every organization has their own style and structure for how they report their successes and challenges in an annual report. Include photos throughout, particularly in the highlights section. While many annual reports include a donor list, in the printed report, there is a trend toward posting the list of donors to the organizations website.

RESOURCES:

- A variety of strategic planning resources can be found online.
    - www.strategicplantool.com
    - www.planware.org
    - www.managementhelp.org
- The IRS' "Life Cycle of a Public Charity" is an excellent checklist of things to keep in mind during every stage of your organization's life.
    - www.irs.gov
- Idealist is an interactive site where people and organizations can exchange resources and ideas, locate opportunities and supporters and take steps toward building a world where all people can lead free and dignified lives.
    - www.idealist.org
- Free Management Library is an online resource for nonprofits with information on how to start a nonprofit as well as a basic overview of what is involved in managing a nonprofit.
    - www.managementhelp.org
- Nonprofit Good Practice Guide provides information on virtually all aspects of managing a nonprofit organization. It can be used as a quick reference in preparation for meetings, as a training tool or for in-depth research.
    - www.npgoodpractice.org
- Better Business Bureau – Wise Giving Alliance
    - www.us.bbb.org
- The Foundation Center provides educational classes and it has an online grant research director.
    - www.foundationcenter.org

Reviewing Your Operations

Maximize Your Board of Directors, Staff, Volunteers and Constituents

By engaging your board, you will have a larger group vision for the direction of your organization.

ENGAGE YOUR BOARD OF DIRECTORS

Your board should include a variety of members from the cancer community, including from the medical, psychosocial and administrative aspects. Make sure your board members provide new perspectives, valuable connections to the community or unique skills and expertise. Consider the following strategies to create the best experience possible for both your organization and your board of directors.

Conduct periodic surveys of your board members.

- When each member comes on board, it can be helpful to have an introductory survey that identifies their areas of interest, skills and abilities, connections within the community and personal goals for their participation on the board. Additional surveys can be used throughout the board's experience to garner feedback on their participation, views on the organization and suggestions for future board members.

Create a board of director's handbook. Items you may want to include in your handbook are:

- An overview of the organization, including organizational contacts and staff roles
- A position summary including bylaws and a description of your governance model
- Expectations of board members (financial obligation, committee participation, meeting attendance, etc.)
- Membership and committee rules
- Calendar of important events and dates
- Board member terms and contact information
- Board member bios and resumes
- Copies of forms that board members may need (i.e. expense reports)
- Conflicts of interest policy

Engage your board of directors in your organization's activities.

- By engaging your board, you will have a larger group vision for the direction of your organization.
- Include your board in the development or review of your mission and vision statement and bylaws.
- Invite board members to participate in organizational activities, events, celebrations and staff meetings.
- Capitalize on momentum following board meetings and stay focused on long-term and short-term goals.

Reviewing Your Operations

Maximize Your Board of Directors, Staff, Volunteers and Constituents

MANAGE YOUR CONSTITUENTS

- If possible, get good database management software and keep careful track of all constituents, such as participants, volunteers, staff, donors and partners.
- If you do not have access to or the means to purchase specific software, Microsoft Excel can be just as useful for tracking information.
- Use software to create processes to maintain and update mailing lists and email lists.
- Understand why you are collecting information, what information you will want to collect and what you plan to do with that information and create your database fields accordingly.
- Do not collect information from constituents that you will not be using in some way to enhance your program. For example, if you only need to know how many constituents were served, then just collect basic information. However, if you need to know demographics on race, sex, location, gender, age, etc, then you will need to have intake forms and a database to capture that.

SUPPORT AND TRAIN YOUR STAFF AND VOLUNTEERS

Appropriate and ongoing support and training of the staff who work at your organization, as well as the volunteers who work to support your mission, is a necessary component. It not only helps to maintain consistency, but it also provides your staff and volunteer base with the confidence to represent your organization well. In this section, you will learn strategies to best support your staff and volunteers.

- Develop a functional organizational chart so your staff and volunteers understand what everyone does, what the chain of command is and who they can go to with specific questions.
- Assess if there are any gaps in skill sets or backgrounds that cannot be met with your current staff. You want to have the right staff matched with a project that they have the skill to manage. Do not create a project or event that you do not have appropriate staff support to manage well.
- Develop a clear decision-making process that can be shared with your staff. This should address the who, what, when, where, why and how of all decisions. This will not only involve staff in decision-making but build trust that all perspectives are being considered, when possible.

Develop a functional organizational chart so your staff and volunteers understand what everyone does, what the chain of command is and who they can go to with specific questions.

Reviewing Your Operations

Maximize Your Board of Directors, Staff, Volunteers and Constituents

SUPPORT AND TRAIN YOUR STAFF AND VOLUNTEERS

(continued)

- If possible, offer professional development opportunities for staff. While it can be costly, supporting your staff and providing them with training that is essential to their job can go a long way in not only retaining staff but ensuring that your programs have a better chance of being successfully staffed.

Be aware and realistic about staffing and volunteer needs for programs and events.

- If you can't staff it, don't have it.
- Hire staff with a background that matches the program and organizational objectives for the targeted group.
- Make sure the skill sets of your volunteers match your needs. Many people may want to help, but be discerning how you use them, especially in your core programmatic activities.

Effectively communicate with participants and volunteers.

- Communicate early and often; clearly and concisely.
- Do not rely solely on email; a direct conversation can add a positive personal touch.
- Identify what mechanism of communication works best for your staff and volunteers.

Manage volunteers.

- Have a recruitment strategy, including a page on your website advertising volunteer opportunities. An online application is an easy way for people to express their interest in getting involved.
- Ensure that volunteers know what they are doing by setting clear expectations of their roles and responsibilities.
- Create a new volunteer checklist to ensure you can track what information should be and has been communicated with each volunteer.
- Ensure that you have a good grasp on your volunteers by completing a background check and establishing policies and procedures.

Be an effective leader and convey your spirit and enthusiasm for your mission in all communications. Your attitude can be infectious.

Reviewing Your Operations

Maximize Your Board of Directors, Staff, Volunteers and Constituents

Recognize the importance of each volunteer. Recognition is important for maintaining happy volunteers and staff and can come in the form of a phone call or handwritten note.

SUPPORT AND TRAIN YOUR STAFF AND VOLUNTEERS

(continued)

Manage volunteers

- Train and orient each volunteer. This should include:
  - Your organization's history and mission.
  - An overview of your organization's programs and development activities.
  - A brief training of office procedures, including volunteer hour tracking, computer login information, any passwords they'll need to know, etc.
  - A volunteer handbook. Much of this handbook can be taken directly from your employee handbook, but be mindful of wording. A volunteer is very different than an employee and must be treated as such.
  - A tour of your office and introductions to key staff members.
- Always make volunteers feel like they are part of the team. Give them a nametag or t-shirt to wear, take their picture to hang on your volunteer photo board and keep them informed of important organizational news.
- Recognize the importance of each volunteer. Recognition is important for maintaining happy volunteers and staff and can come in the form of phone call or handwritten note. Perhaps a small but meaningful gift or a simple appreciation lunch. Don't spend a lot of money – your volunteers want to see the money your organization raises go into programs!
- Keep track of how much money you have saved by utilizing volunteers. You can find the value of volunteer time on independentsector.org. This is always impressive to your board.
- If a volunteer imposes their own agenda or ego into the program, do not be afraid to find a better fit. Finding and working with their strengths can be valuable. While they may mean well, the objective of the program needs to take precedent.
- Keep in mind that many of the tasks that volunteers are needed for are low-level administrative tasks, i.e. mailings, filing, database entry, etc., which can be tedious and monotonous. If you explain the significance and background of what it is they are doing and how their work will directly impact your organization, you will keep them motivated.

Reviewing Your Operations

Maximize Your Board of Directors, Staff, Volunteers and Constituents

SUPPORT AND TRAIN YOUR STAFF AND VOLUNTEERS

(continued)

- As you get to know volunteers, keep a record of what they indicate as interests and the ways they would like to be involved. This will help you match a person's interest to a specific activity.
- Engage in regular communication. Touching base periodically even through an email or newsletter will help maintain a long-term relationship.
- Always be clear about your expectations.
- Find out ways to turn volunteers into leaders.
- Ask for feedback. It is always important to find ways to improve your organization, particularly how you communicate with and effectively use your volunteer base. Asking your volunteers to give feedback is a great way to ensure that their needs are being met.

RESOURCES:

- Board Management help can be found at:
  - www.managementhelp.org
- BoardSource is dedicated to increasing the effectiveness of nonprofit organizations by strengthening their boards of directors. Its programs and services mobilize boards so that organizations fulfill their missions, achieve their goals, increase their impact and extend their influences:
  - www.boardsource.org
- Managing volunteers:
  - www.managementhelp.org
- GoodSearch is a search engine that donates 50% of its revenue to the charities and schools designated by its users:
  - www.goodsearch.com
- Greenlights offers a meeting notes template, which can be used for board, committee or staff meetings to keep track of action items and goals:
  - www.greenlights.org

Engage in regular communication. Touching base periodically, even through an email or newsletter, will help maintain a long-term relationship.

SECTION 2: PLANNING AND EVALUATING EFFECTIVE PROGRAMS

Program planning and evaluation are critical and necessary steps not only to a successful program but a successful organization. Understanding the steps involved in reviewing the needs of your community, as well as how to develop an evaluation plan to guide your program development, will be discussed in this section.

Planning Steps

A well thought-out plan will be helpful in program execution, as well as while recruiting participants, creating promotional materials, soliciting donors and evaluating programmatic success.

Develop Your Evaluation Plan

Evaluation is the process of determining the worth, merit and effectiveness of a program or product based on relevant standards typically set by the organization.

Conduct Formative Research

Gather information that will help you to design and refine your program by conducting interviews, holding focus groups or pilot testing your program.

Manage Your Data

Once you have developed your full evaluation plan, planned your program, refined it through studies and decided that it is needed, you are ready to implement your program.

Planning and Evaluating Effective Programs

PLANNING STEPS

Before you begin any new program, consider the entirety of the program, including:

- The needs of the individuals you plan to serve
- The type of intervention that would address those needs
- What it would look like if you were to successfully address that need

With these three things in mind during the planning phase, you will be able to develop an evaluation plan that can help guide you from establishing a new program or initiative through final evaluation.

Planning begins from the moment you think about establishing a new program. A well-thought-out plan will be helpful in program execution as well as while recruiting participants, creating promotional materials, soliciting donors and evaluating programmatic success. The following information will help you understand how to identify an appropriate need to address and the steps for creating an evaluation plan for your program. The evaluation plan will guide your program or project by tracking the short-term and long-term objectives. It will also help identify the resources needed and the activities necessary to make the project a success. It will help you reach your stated outcomes.

Before you can establish the specifics of a new program you must define a need. To do this, you should consider the following steps:

CONDUCT A NEEDS ASSESSMENT

A needs assessment is a systematic review of the existing capacity and needs for a given group. It asks what does this group have and what do they need? This review should take into account scientific and other published data and written reports. It should include information garnered from community members that will demonstrate gaps between current situations and more desirable outcomes. It can be hard to differentiate between the actual and perceived needs of a community. A needs assessment is a great way to get a less biased look at what programs or services are most needed and have the greatest potential for success.

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Planning and Evaluating Effective Programs

Planning Steps

If you are asked to demonstrate that your program is evidence-based, be prepared to describe how you know that your program will be effective.

CONDUCT A NEEDS ASSESSMENT

(continued)

To begin, review the following existing data:

- The demographics and cancer burden of your community. Review the following sources for more information:
  - Your state cancer plans
  - Surveillance Epidemiology and End Results (SEER) data
  - Centers for Disease Control and Prevention (CDC) statistics and data
- The needs of cancer survivors and the gaps in services nationwide. Below are helpful reports:
  - Institute of Medicine (IOM) reports
  - Healthy People 2020
- In order to get a true picture of the needs of the people you serve, you may want to augment this data with an assessment of your own. Your community needs assessment can include a review of the following reports and materials:
  - The President's Cancer Panel reports
  - National Cancer Institute (NCI) Reports, Research, and Literature

ESTABLISH AN EVIDENCE BASE

While planning your program, it is important to consider the base of evidence that supports the program design. The term evidence-based is commonly misunderstood. If you are asked to demonstrate that your program is evidence-based, be prepared to describe how you know that your program will be effective or provide examples of similar models that have been successful. Your response should answer the following questions:

- What pre-existing programmatic model is it based on?
- Are you drawing from a valid or reliable theory of health behavior for your intervention?
- Is your idea based on a program, model or theory that has been shown to be effective at accomplishing your desired outcome?

You should be able to describe why you selected your program design based on the proven impact, effectiveness and efficiency of other similar programs. You will note that this is very different than defining the need for your program. In that case, you would be demonstrating the gap or need that exists within a certain population that will be fulfilled by your program. There may be data to support why your program is needed in that certain population, however, your evidence base will describe why your specific program will be effective in filling that gap or serving that community.

Planning and Evaluating Effective Programs

Planning Steps

ESTABLISH AN EVIDENCE BASE

(continued)

- Review theories and models.
  - There are many theories that explain health related behaviors and the steps people go through when trying to change behaviors. If you are truly doing something new and innovative you will still want to use theories and models in program development.
- Review your existing data.
  - Data you have gathered from existing programs can also be helpful in designing your new program. Review your existing data to determine the evidence base for the program you are developing.
  - Do you have research on the effectiveness of a similar program you have developed?
  - Have the strategies you are proposing been shown to be effective in other population groups or settings?

RESOURCES:

- National Center for Chronic Disease Prevention and Health Promotion, Health-Related Quality of Life:
  - www.cdc.gov
- Health Information National Trends Survey (HINTS):
  - www.hints.cancer.gov
- U.S. Department of Health and Human Services, National Institutes of Health, National Cancer Institute and Making Health Communication Programs Work:
  - www.cancer.gov

Common theories often used in public health are:

- Explanatory theory
- Change theory
- Health belief model
- Transtheoretical model of change
- Theory of planned behavior
- Precaution adoption process model
- Social cognitive theory
- Communications theory

Review other evidence-based programs to support the need for your program:

- Cancer Control Planet
- The Community Guide

Planning and Evaluating Effective Programs

Develop Your Evaluation Plan

Create and define your program goals and objectives and list them in your evaluation plan.

DEVELOP YOUR EVALUATION PLAN

Evaluation is the process of determining the worth, merit and effectiveness of a program or product based on relevant standards typically set by the organization. While evaluation is often thought of as the last step, it should be considered throughout the planning process and continue through all stages of program implementation and refinement. The following information will provide more detail about each of these steps and highlight that, with appropriate planning and foresight, no part of the process needs to be difficult.

As you create your evaluation plan, think about the steps you will need to take. You may need to add to and pare down your activities as needed once the picture becomes clearer. Remember to think about what success will look like for you and your community. How will you know that you have achieved your goals? With that in mind, create your plan, implement your program and measure your success as you conduct your work. By including evaluation at the onset of your program and clearly identifying what success will look like, you are likely to impact your community positively.

Begin to develop your evaluation plan in the onset of the planning stages of your program. While you may not be able to fill in every part of the plan at the very beginning, by thinking about your goals and objectives and the other aspects of the evaluation plan, you will begin to see what other information you will need to clearly plan your program.

COMPLETE YOUR EVALUATION PLAN TEMPLATE

- Your evaluation plan can guide your program or project by tracking the short-term and long-term objectives, resources needed and activities necessary to make the project a success.
- Familiarize yourself with evaluation terms and definitions.
- Stay intensely focused on your mission. It is important that the goals and objectives you set for the program fit fully within your organizational mission. While the temptation may be there to broaden your program's scope if an opportunity arises, think through it carefully. This can be the quickest route to failure, especially if resources are limited.
- Use the results of your needs assessment to guide the development of your goals and objectives. This will help you ensure that the program fits the overarching culture and philosophy of your target population. Be wary of assuming what your community needs. This can lead to programs that are not supported by the community.

Planning and Evaluating Effective Programs

Develop Your Evaluation Plan

By laying out your activities and output in your evaluation plan, you can think about how all of your actions will come together.

COMPLETE YOUR EVALUATION PLAN TEMPLATE

(continued)

- Identify the activities that you will undertake to address the needs in your community. From the evidence base you have developed, determine what is working and what is not. List your activities in the appropriate section of your evaluation plan. You can decide whether your list will be broad or very specific, but you will want to consider how each activity will impact another. Be sure to only complete those activities that are necessary to achieve your goals and objectives.
- Make sure your objectives are SMART: specific, measurable, achievable, realistic and timely.
- Think about the resources you will need to complete your objectives. If you organization cannot do it all alone, determine if it is appropriate to work with others on this program and then identify appropriate partners. Resist the temptation to go beyond your area of expertise unless you have the organizational competence, staff and funding to do it successfully.
- Complete the resources section of your evaluation plan ensuring that you have thought about what people, technological and financial resources will be needed to meet your objectives. Your organizational chart should help with this process.
- Identify the outputs and tangible deliverables, and assign those outputs timelines in which they will be accomplished. This will help to keep you and those working with you to stay on task. If you plan on holding a meeting and you want to conduct a survey after the meeting ask yourself when you will need to have this survey created and reviewed with time to get it stuffed in meeting packets? When will you need to have a final report including the analysis of the report to provide your grantor or to make decisions to refine your program? By laying out your activities and output in your evaluation plan, you can think about how all of your actions will come together.
- Consider partnering with other organizations to recruit participants, to market your program or to conduct the actual program. If you organization cannot do it all alone, determine if it is appropriate to work with others on this program and then identify appropriate partners. Review the Conducting Community Outreach section for more information on this topic.
- You may need to apply for grant funding or raise additional funds for a program. Avoid seeking money that is outside of your organizational mission or vision. The temptations will be there, but only seek funds that are directly tied to your mission.

Planning and Evaluating Effective Programs

Develop Your Evaluation Plan

ASSESS ANY BARRIERS AND CHALLENGES

Think about the types of issues that could arise and how you might cope with them.

- Carefully consider when and where you will offer your program. Timing of programs, both the time of day and year, can influence your program's success. For example, if you are developing a program for adolescents and young adults, you will want to work around school and work schedules. Additionally, practical issues such as transportation and access to the physical location, daycare and food are other barriers that can greatly impact your program.
- Consider the needs of your community when planning your work. How will you ensure that the literacy level and the cultural competency of any materials you develop will be appropriate for your community?
- Assess your financial and resource limitations to ensure you can support the program as it is designed. For example, if your program is held during dinner hours, make sure you have the funds to offer food to the participants. If you cannot do this, you may want to assess why you are holding an event during that time and evaluate a need to change this.
- Develop a project budget template specifically for the program or project you are proposing to implement.

UNDERSTANDING SAMPLE METRICS

Understand what sample metrics are and how they are part of your evaluation plan. Develop appropriate metrics based on your plan.

Consider the type of evaluation you want to conduct. You can measure the process, the outcome or both.

- A process evaluation assesses if your program was delivered as intended. It does not assess how successful the program was. This is often helpful when you think you might want to follow the same steps again later so that you can learn from your successes and challenges.
- An outcome evaluation (or impact evaluation) looks at the extent to which your program produced the desired outcomes. When you compare your program to another similar program, this allows you to measure your impact.
- Both may be used alone or in conjunction with each other.

Consider the needs of your community when planning your work. How will you ensure that the literacy level and the cultural competency of any materials you develop will be appropriate for your community?

Planning and Evaluating Effective Programs

Develop Your Evaluation Plan

While it is not always possible to measure everything, think about what measures are the most important and then select the appropriate tools to measure those.

RESOURCES:

W.K. Kellogg Foundation

- www.wkkf.org

University of Texas

- www.utexas.edu

American Evaluation Association

- www.eval.org

UNDERSTANDING SAMPLE METRICS

(continued)

Determine the appropriate tool to measure success.

- When determining what tools you will use, you should think about what it would look like if you were to successfully address the need you have targeted. For example, what information would you need to have in order to know that you have addressed the need?
  - Is it satisfaction with your program?
  - Is it healthier eating habits?
  - Is it better communication between patient and provider?
- While it is not always possible to measure everything, think about what measures are the most important and then select the appropriate tools to measure those.
- Think about the information that you want to gather and how you will use it and if this can occur through a survey. Also, think about who will be responsible for creating the survey, monitoring responses and analyzing the data.
- When designing a survey or other questionnaire, it is important that your questions are very specific and that the way they are phrased will yield the information you are seeking.
- If you do not think a survey is best, you can use other ways such as case studies, tracking web hits, tabulating media impressions, monitoring legislation or conducting a focus group.
- Surveys are a great tool to consider if you want to gather a good deal of information quickly from a specific set of individuals.
- If available, you can also use existing standardized assessments and questions to gain answers to the questions you are asking.

DEVELOP A LOGIC MODEL TEMPLATE

This can serve as an easy way to communicate and share your evaluation plan. While a logic model is not always necessary, it is another tool that can be helpful. A logic model uses a chart to show the resources needed, the activities that take place and the benefits or changes that result from your program. Logic models offer a one-page view of the major elements of your evaluation plan.

Planning and Evaluating Effective Programs

Conduct Formative Research

CONDUCT FORMATIVE RESEARCH

Gather information that will help you to design and refine your program by conducting interviews, holding focus groups or pilot testing your program. Before you begin using any of these techniques, be sure to think about how you will use the information gathered and what you will need to know in order for the information to design your program.

For example:

- If you want to create a program working with school-aged children diagnosed with cancer, then consider conducting interviews with the school principal or other key school professionals.
- Alternatively, if you want to create a new educational piece for health care providers to share with brain tumor survivors, then consider conducting multiple focus groups: one with brain tumor survivors and one with health care providers who serve this population.
- If you want include a new component to an existing program, then consider doing this initially by using a pilot test to add one new element at a time.
- Finally, you may want to consider using these techniques together as well to gather all of information you need at the beginning and throughout your program implementation.

CONDUCT INTERVIEWS

- Interviews can be an effective way to get information from your target audience. You may select to conduct interviews with key individuals, such as a survivor from a particular population, to help create your program.
- Develop a set of questions that you will ask before you hold the interview so you can ensure you know what you will discuss.

Interviews can be an effective way to get information from your target audience.

Planning and Evaluating Effective Programs

Conduct Formative Research

HOLD A FOCUS GROUP

Focus groups can be an effective way to get information from your target audience about your overall program concept and specifics like proposed messaging and outreach strategies. Focus groups are often used for pre-testing before a program is finalized or launched.

Characteristics of a successful focus group include:

- No more than six to eight participants.
- A group that represents multiple perspectives and stakeholders.
- A skilled moderator who can facilitate a focused discussion.
- A moderator's guide containing questions that will provide you with specific information and the ability to draw conclusions about program design from participant responses.

CONDUCT A PILOT TEST

- Pilot tests allow you to test a version, or multiple versions, or a program or product. Pilot tests are essentially a limited roll out or small scale implementation of your program to a selected audience for testing.
- Pilot tests may also be part of your implementation steps.
- Characteristics of a successful pilot test include:
    - A well developed program that can be reviewed for specific refinements.
    - A sampling from your target audience that does not have prior knowledge of your program/product.

RESOURCES:

CDC Evaluation Working Group:

- Use this to learn about the CDC Evaluation Working Group and its effort to promote program evaluation in public health. The link below provides an overview of the group, highlights of a framework for program evaluation and additional resources that may help.
    - www.cdc.gov

Pilot tests are essentially a limited roll out or small scale implementation of your program to a selected audience for testing.

Planning and Evaluating Effective Programs

Manage Your Data

Keep in mind what success will look like to you and think about how you are seeing the changes you planned to occur.

MANAGE YOUR DATA

Once you have established a need, developed your full evaluation plan, planned your program, refined it through studies and decided that it is needed, you are ready to implement your program. There are many influences to be aware of when implementing a program or project. Be sure to always keep your target group's established and defined need in mind as you proceed. Your evaluation plan can serve as the framework for program success.

Implementation is the time when all of the comprehensive planning that you have done is put to the test. Evaluation plans are intended to be flexible. You will want to use the data you are collecting along the way to adapt your program to reach your goals. For example, while you may have found that past programs were very successful in reaching cancer survivors after work, your current population may have a tough time participating at that particular time.

The majority of issues you face are likely to be barriers or challenges that you have already anticipated. Hopefully, you have put some thought into how to address if they were to arise. In the end, there may be changes that need to be made. Using the data you have collected throughout the planning and evaluating processes is crucial to gain support from your organization as well as the constituents you may serve.

COLLECTING DATA

- Data collection should be ongoing throughout program planning, development and implementation. This may include collecting names on sign-in sheets, handing out surveys or collecting comment cards. This will help you to monitor your progress without being burdened by data collection at the end.
- Keep in mind what success will look like to you and think about how you are seeing the changes you planned for occur.

Planning and Evaluating Effective Programs

Manage Your Data

By sharing accurate data, your board will be better able to help you make decisions for the future.

SHARE YOUR DATA

As you collect data, think about who will want to learn about the results of your program. There are a number of different stakeholders and audiences who will be interested in your data. Those audiences may include:

Granting sources (if you have a grant)
In the Understanding Grants section of this toolkit, there is more comprehensive information about reporting to your grantor(s). You will want to ensure that you have mechanisms in place at the onset of your program so that you can complete all of the grant requirements and are able to report in a timely manner. Think about how you will present this information and the amount of time it will take to put this together. For example, the grantor will likely not want you to send a set of completed surveys, but may want to read a summary of the data you found. Additionally, if you are collecting information outside of what is required, check in with the program officer of your grant as they may be interested in reviewing your results.

Board of Directors
More than likely, your board will want a condensed and summarized report on what you have learned through programmatic evaluation. You can use your results to substantiate needs, such as why a program needs additional funding, should be expanded, replicated or even discontinued. By sharing accurate data, your board will be better able to help you make decisions for the future.

Donors
The more comments and qualitative data tying dollars to specific numbers of people served are often times the most compelling pieces of data to donors. You can engage your donors by putting numbers to programs. For example, your data could show that for every $20 raised, you are able to educate 10 cancer survivors on how cancer may affect their lives.

Staff
In order to improve your program, your staff will need to have access to the results of the work you are doing. Sharing data with staff will help your team to see the results of the great work they are doing. It will also help to make changes for continued successful programs, especially if you have conducted any process evaluation.

Planning and Evaluating Effective Programs

Manage Your Data

SHARE YOUR DATA

(continued)

Clients or Participants

Often times, data collection takes the biggest toll on your participants. Knowing that the information they provided was collected for a reason, and is being used for another purpose, can help you in the future. People are more likely to provide data if they know it is being put to good use. For example, if you conduct a survey to assess your current technical support and then change what you provide as a result, let your clients know that their voices were heard. You can do this through an email or your newsletter.

Your Community, the Cancer Community and the Media

The Marketing, Communications and Public Relations section of this toolkit provides more information about how to share your successes. Having hard data to tie to your program will help you tell a more compelling story. Peer-reviewed articles, conference presentations, local papers, news and many other sources are excellent outlets for sharing your results, gaining credibility for you program and ensuring that people affected by cancer have access to your program and results.

Final Tip

Think about what needs exist in your community. Define how you are best suited to address one or more of those needs. You should be able to answer the following questions:

- What are the needs in your community?
- What is the need in which you will have the ability to make the greatest impact?
- Is there an evidence base for your program?
- Will your program address the need?
- What are your goals and objectives?
- What will success look like?
- How will you know that you have achieved your goals?

Think about what needs exist in your community. Define how you are best suited to address one or more of those needs.

Iram, 34, Diffused Astrocytoma Survivor

SECTION 3: UNDERSTANDING GRANTS

In this section, you will learn more about the grants management process as well as the questions to ask yourself when choosing grants. You will also learn how to work effectively with your funding sources once you have a grant, including how to establish and maintain a positive, ongoing relationship with grantors.

Locate Potential Grantors

Look into additional larger cancer organizations to learn about their grant cycles and funding opportunities.

Create Grants That Will Get Funded

After you have decided on the grant you would like to apply for, determine the fit with your organization.

Manage Your Grants Successfully

Understanding Grants

Locate Potential Grantors

LOCATE POTENTIAL GRANTORS

Look into other larger cancer organizations to learn about their grant cycles and funding opportunities such as:

- LIVESTRONG Foundation
- Susan G. Komen for the Cure
- American Cancer Society (ACS)
- The V Foundation

- Check with local private, public or family foundations in your area. Often local foundations are only interested in funding projects in that area or specific scope, so build a relationship with that funder and learn about their areas of interest. Many family foundations are created with a specific focus in mind but are open to hearing what identified community needs are. It's recommended that any nonprofit organization establish a rapport and develop a long-term relationship with local funding groups that will enhance their funding portfolio and also create a local funding mechanism.
- Do the funding sources offer competitive funding cycles? Is there a committee that determines how state funds are dispersed? Review other organization's websites to find out where they have received money from. There is a chance they will not share this information with you, but it is worth asking.
- Read successful grant proposals before writing your own. Consider taking a grant writing workshop in your community. Ask colleagues in the community to share their accepted proposals with you for reference.
- Local libraries are also great resource for locating local grant-making institutions. Many provide free or reduced prices for accessing foundation databases. Contact your local library and university systems for more information. Check with the funding agency to see if they will release funded proposals as examples, or if the funded organization would share their application.

RESOURCES:

The Foundation Center maintains comprehensive database on U.S. grant makers and their grants. It also operates research, education and training programs designed to advance philanthropy at every level.

- Cancer Control Planet

Check with pharmaceutical companies such as:

- Medical Health Plans
- Ely Lilly and Company
- Aetna Foundation

Check with federal funding sources such as :

- Centers for Disease Control and Prevention (CDC)
- National Cancer Institute (NCI)
- National Institutes of Health (NIH)
- Health Resources and Service Administration

Look for national grantors that do business in the communities you serve. They will often have broader parameters (i.e. types of grants, amounts and topic areas) in the communities in which they do business.

- Robert Wood Johnson Foundation
- Bill and Melinda Gates Foundation

Understanding Grants

Create Grants That Will Get Funded

Be sure you look at all the grant requirements and evaluate the time and effort required relative to the funding amount of the grants. Are the grant application and subsequent reporting requirements, which can be extensive, a good use of your staff time and resources?

DETERMINE THE FIT WITH YOUR ORGANIZATION

- Thoroughly review the grantor's website or other published materials to make sure your proposed program fits with their established priorities.
- Be sure you look at all the grant requirements and evaluate the time and effort required relative to the funding amount of the grants. Are the grant application and subsequent reporting requirements, which can be extensive, a good use of your staff time and resources?
- Do not waste time applying for grants that are of marginal fit for your organization's mission. Remember that your organization and its programs should drive your funding solicitations, not reversely.

SET YOUR TIMELINES

- Determine if they accept proposals year-round or only through an established Request for Proposals (RFP) process.
- If grantors use an RFP process, be responsive by following the deadlines.
- Plan to apply early so that you have adequate time to address any unforeseen complications with submitting the application.
- Create a "tickler" system to track when you completed and submitted your application, as well as when the review dates may be and when you should receive an answer about your proposal.

FOLLOW GUIDELINES

- Follow the established guidelines for the grant application. For example, if the grantor requires a specific font, word length or template, do not ignore those instructions. You may be eliminated from the formal grant review process for that reason alone.
- If the grantor allows, contact the grant manager or program officer for that organization to get clarity on expectations of the grant and to identify if your program idea is a good fit for the grantor.
- Look at the grantor's prior funding amounts and fit your request within their traditional giving range.
- Be accurate, truthful and succinct in your grant application.

Understanding Grants

Create Grants That Will Get Funded

FOLLOW GUIDELINES

(continued)

- Proofread your grant proposal and have others proofread prior to submission, especially if you are cutting and pasting from other documents.
- Make sure any attachments are accurately labeled, either electronically or with a header if submitted on hard copy. Attachments may include your CV or resume, organizational description or budgets.

PREPARE FOR A RESPONSE

- Anticipate that not all of your grant applications will get funding. Do not be deterred by this. Grantors receive many more grants than they can fund and you will most likely experience rejection. Do not always take it as a reflection of the quality or value of your program.
- If your proposal is rejected, contact the grantor and ask about the reasons behind the decision. However, be aware that some grantors may not be able to provide that information because of limited resources and/or due to a large volume of applicants.
- Submit again in the next grant cycle, if applicable.

RESOURCES:

- Council on Foundations
  - www.cof.org
- Guidestar
  - www.guidestar.org
- Nonprofit Guides are free web-based grant-writing tools for nonprofit organizations, charitable, educational, public organizations and other community-minded groups. The guides are designed to assist established US-based nonprofits through the grant-writing process:
  - www.npguides.org

Anticipate that not all of your grant applications will get funding. Do not be deterred by this.

Understanding Grants

Manage Your Grants Successfully

Helpful Tips:

- *Keep in mind that no two funding sources are alike.*
- *Understand the complexity of the parameters of any and all grants you apply for and are granted in order to meet the needs of the grantor and your program's funding source.*
- *When tracking data, it should be noted that the use of Excel and Access is adequate for small organizations just getting started. However, as the organization grows, a more sophisticated database may be required.*

ESTABLISH OPEN LINES OF COMMUNICATION

- Always communicate with your grantor through the established program officer.
- An introductory call with your grantor is important. Call to introduce yourself and have a preliminary discussion with your contact about your grant and its objectives.
- Use the time to discuss the best ways and times to communicate with them in the future regarding changes and updates.
- Regular communication with the grantor can be helpful. Communicate both your struggles and successes and provide appropriate timely reporting to the grantor. However, be aware that funding sources vary widely in the amount of contact they want. Some like direct and ongoing communication; others do not encourage or desire any contact.
- If a grantor contacts you, respond in a timely fashion. Grantees who do not respond to communication from their grantor run the risk of potentially losing funding, the respect of the organization and disqualifying themselves for future funding from that organization.
- Discuss with your grantor any challenges you are dealing with before the end of your grant. It is never a good idea to submit a final report on a project that was not successful without having had prior discussion with the grantor about this.

LEARN ABOUT YOUR GRANTORS POLICIES AND PROCEDURES

- Read and understand the funding contract and grant obligations. If possible, have a lawyer review it in a timely manner to ensure you can agree to the requirements.
- If the grantor has a policies and procedures manual, read it and ask the grantor to answer any questions you may have.
- Ask your grantor if there are specific reporting forms you should use and use them.
- Learn about timeframes for reporting, meetings, conference calls and any other recommended and required aspects of your award.
- Grantees who are regularly non-compliant run the risk of potentially losing funding, the respect of the organization and disqualifying themselves for future funding from that organization.

Understanding Grants

Manage Your Grants Successfully

Consider inviting grantors to your events, send emails and photos of ongoing projects and participate in any grantor-related events, if possible, to build rapport and engage your grantor.

RESOURCES:

Geofunders is a coalition of grant makers committed to building strong and effective nonprofit organizations.

- www.geofunders.org

ADHERE TO REPORTING REQUIREMENTS

Be sure to find out and adhere to the reporting requirements of the grantor.

Keep a calendar or schedule of grant reporting requirements. As you acquire more grants, they become more difficult to track, so develop a "tickler" system to ensure timely reporting and to track target dates or schedule of events. A tickler system is a process that prompts you to be reminded of a particular action at a later date. It can be a reminder system and a way to make documents or data available at a particular time in the future, and it can include an automated, paper or folder system.

- Do NOT ignore the grantor's timelines. The timelines established in your proposal and in the grantor's policies and procedures should be viewed as deadlines and contractual obligations, not as projections.
- Do not make significant changes to your timelines, outcomes or budget without asking the grantor if they approve. Remember, they decided to fund your project based on the proposal. If the project significantly changes (and without justification), the grantor may no longer want to continue funding.
- Many grantors are working with multiple grantees, so it is important to reach out to them to provide updates, ask questions or just stay involved. It is recommended that organizations send updates or materials on their grant outside of reporting requirements (unless specifically asked not to) to engage with the grantor and provide reminders of what you are doing. By highlighting program successes, you provide the grantor with a tangible reminder of who and what you are. You also give them something to share with their board or constituents as an example of success.

BE A RESPONSIBLE STEWARD OF FUNDS

Remember that you are a steward of the money entrusted to you by your donors. Spend their funds wisely, efficiently and effectively.

- Consider if your purchases and business expenses would be questionable if examined by a donor.
- Have monthly or quarterly review meetings with the staff involved in the implementation of your grant. Make a schedule of activities with benchmarks and target dates.
- If the grantor offers regular conference calls, annual meetings, conferences or technical support services, take advantage of them. This shows that you are engaged in the process and are committed to making your program successful.

SECTION 4: FUNDRAISING SUCCESSFULLY

Fundraising and development can occur through many different channels. This could include your website, direct mailings, grant writing, major and planned giving and direct sales. It is easy to get bogged down with fundraising events. Fundraising tends to be focused on short-term goals and outcomes that are reset at the end of each fiscal year or event. Development is a much longer term "ask" creating a different relationship and impact. These include but are not limited to endowments, major gifts, scholarships, fellowships, grants, sponsorships and awards. This section focuses largely on event planning but also covers other common forms of fundraising.

Planning Your Events

Although there are many different sources of revenue you may choose to pursue, one of the primary sources of revenue for many nonprofits is fundraising through events. Consider executing one or two events each year.

Annual Giving

Events are not the only way to raise funds for your organization. Consider other options including pledge drives, direct mail campaigns and e-mail blasts asking for donor support.

Thank Your Donors

No matter how you raise your funds, establish a plan to thank your donors that is relative to the scale of donations.

Fundraising Successfully

Planning Your Events

DECIDE WHAT TYPE OF EVENT YOU WANT TO HOLD

- Research other local organizations' websites to see what type of events they hold. You want to make sure your event is not scheduled at the same time as or identical to an established ongoing event in your community.
- You can also call and talk with someone from a similar sized agency to get tips and feedback on the lessons learned from their event. In general, other cancer organizations want to share their success stories and lessons learned.
- Explore different kinds of events and take into consideration what fits best with your organization. Events can range from a bike ride or a community 5k, to an upscale gala, to a picnic, barbeque or party with a silent auction.
- You can set a fundraising minimum that must be reached in order for your constituents to participate in your event. This will increase awareness about your organization and create a larger pool of donors.

FIND RESOURCES TO SUPPORT YOUR EVENT

- Hire a consultant, if possible, or ask if they will donate their time to help with the event. Even if you cannot afford to utilize these services for the execution of the event, you can brainstorm with them and develop a plan.
- Small budgets require savvy shopping, getting donations and leveraging in-kind support.
- Explore how much can be done online instead of in person. For example, having people register for your event online may save staff time and resources and, potentially, reach a larger audience.
- Find any and all ways to get items, services and materials donated. Engage your board or local partners to donate items and services.
- For event purchases, secure as many nonprofit discounts as possible through local vendors and companies. Also consider donations of goods and services in exchange for sponsorship benefits. Engage your board or, if available, steering committee members to solicit donated goods and services. Many companies do not advertise nonprofit rates, so you never know unless you ask.
- Use your tax-exempt status to save on sales tax.

Although there are many different sources of revenue you may choose to pursue, one of the primary sources of revenue for many nonprofits is fundraising through events. Consider executing one or two events each year.

Fundraising Successfully

Planning Your Events

GAIN COMMUNITY SUPPORT

- Establish a clear target audience for the event and brainstorm ways to reach that audience. For example, if you are hosting a bike race, reach out to all the local bike stores to ask them to post flyers, start their own team or offer discounts to people registered for your event.
- Create opportunities for volunteers at your event. This will not only help you in the execution of your event, but will give you buy-in and support from the community and will allow those who may not be able to afford to attend to still give something back. They will also help connect to potential donors who may not be familiar with your organization.
- Learn how to best tell your story to get people invested. It is always helpful to share stories with donors that make their donation personal.

MAKE IT EASY FOR PEOPLE TO DONATE

- Consider ways to maximize your event and appeal to various donors by offering more than one way to donate. For example, you might include a silent auction at your luncheon.
- Establish sponsor levels that provide greater benefits as the level increases. For example, $5,000 entitles donor to 10 tickets and $15,000 entitles donor to 10 tickets and a full page ad in the program.
- Should you choose to have a more formal gala-type event, ask your supporters to each commit to filling a table with their family and friends. Not only does this take the pressure off of you to fill the seats, but it is also a great way to engage new future donors and supporters.
- You can also encourage your supporters to organize their own events. Have the event organizers ask for pledge donations and hold a contest to win donated items. The winning categories may be:
    - Event organizer who raises the largest amount of money
    - Event organizer who has the most individual donors

RESOURCES:

- Free Management Library Fundraising
    - www.managementhelp.org

Helpful Tips:

- *Learn how to best accommodate credit card needs, including options for PayPal. Explore which option is the most cost-effective, and do not hesitate to encourage your donors to contribute through that method.*
- *Consider using the evaluation of your programs to make a compelling case to donors. For example, "Thanks to your donation of $100, we were able to…"*

Fundraising Successfully

Annual Giving

Helpful Tips

- *Direct mail campaigns keep your previous donors involved and introduce new donors to your mission.*
- *Include a form or envelope in every mailing, at every event and at every other opportunity where you may come in contact with your constituents. The easier you can make it for your donor to give you money, the more likely he/she will be to do so.*

ANNUAL GIVING

Events are not the only way to raise funds for your organization. Consider other options, including pledge drives, direct mail campaigns and e-mail blasts asking for donors' support. If you send a newsletter out each month, consider adding a plug for donations at the bottom of it. You can also work with local employers who allow their employees to make donations to charities directly out of their payroll. Many companies also match employee, spouse and retiree's gifts. Tell your donors they can possibly double their gift by asking their company to match their gift. Keep in mind that you do not always need to be the person making the ask. Once you establish a strong network of supporters such as board members, donors or constituents you can engage them to assist with the fundraising. And think about offering incentives.

PLEDGE FORMS AND SELF-ADDRESSED ENVELOPES

Pledge forms should provide a brief description of your organizations services and list all the information needed to process a donation by credit card. Offer the option to have people make a one-time or recurring donation so that you can process their credit card monthly. A self-addressed envelope will work as a reminder for your donors to make their gift and it will save them time. If your budget allows, a bright color associated with your logo is a great way to make your envelope stand out in a pile of mail.

DIRECT MAIL AND EMAIL CAMPAIGNS

A direct mail and email campaign will mail to one or both of the following:

- *Acquisition:* This is mailing to an "acquired" list of names that are not currently in your organizations donor base. You will most likely pay for these names, which can be costly and you have no assurance that your contacts are going to respond with a donation. Your objective is to get your contacts familiar with your organization over the longer term. If they do make a donation, you can then work to bring them to a regular pattern of donating.
- *Renewal:* This is mailing to your existing donor base. The response rates are higher than acquisition. With renewal, the objective is to increase or maintain the frequency of their gifts while also trying to increase the average gift amount.

For both groups, you need to stress the good work being done by your organization and the urgent need for their (continued) support.

Fundraising Successfully

Thank Your Donors

Stewardship of donors requires more than a one-time thank you. Develop a plan that keeps you in contact with donors all year long – through newsletters, personal notes, and invitations to events.

THANK YOUR DONORS

No matter how you raise your funds, establish a plan to thank your donors that is relative to the scale of donations.

Donation Amount	*Letter*	*Phone Call*
$0 - $25	Computer Generated	None
$26 - $50	Personalized email from volunteer	From staff
$51 - $75	Handwritten by staff	From board member
$76 - $100	Handwritten by board member	From executive

RESOURCES:

- Fundraising 101 Presentation
    - www.doc.state.nc.us
- Other fundraising links:
    - www.greenlights.org
    - www.idealist.org
    - www.foundationcenter.org

SECTION 5: MARKETING, COMMUNICATIONS AND PUBLIC RELATIONS

Marketing, communications and public relations (PR) are crucial to the mission, goals and successes of your organization. These efforts can help spread the word about your programs and events. They can also be proactive in identifying the needs of your constituents. In this section, you will find advice about public relations, sharing your story and how to develop supportive materials. The use of technology and creating effective branding will also be discussed.

Promote Yourself

Promoting yourself and your organization can be done through a number of strategies, venues and styles. By learning the strategies on the next page, you can make decisions that are best for your organization and are tailored for a specific need or event.

Maximize Your Reach

Understanding the different ways that you can increase or strategically direct your organization to specific groups can involve a number of ideas. The following chapter describes ways you can employ to maximize your reach to your targeted community.

Marketing, Communications and Public Relations

Promote Yourself

SHARE YOUR STORY

This is the story, not only of your organization and how it came about, but of those who have been impacted by the existence of your organization. Learning to share your story is crucial.

Be compelling, engaging and relatable.

- People often want to connect with someone who has experienced something similar to an event that has happened in their own life.
- Other times, people just want to know what has motivated someone to live the way that they do. This may include, "What has led to you form a nonprofit organization?"
- By sharing your story, you can provide hope, inspiration and connection to those who take the time to read or hear about a piece of your journey.
- Provide an account of your story that is clear, honest and transparent. If the story is in written form, ensuring that there are no grammatical errors or confusion will assist the audience in better understanding your view.
- You may want to consider creating a unique value proposition per key audience. For example, if your organization focuses on parents and children, one statement could say, "We have formed this organization because we believe that even children can contribute to fighting global warming." Then for the parents, "We have formed this organization because we believe that fighting global warming is a family activity that should be taught in every home." Depending on who your organization is talking to or what channel you are in, you can adapt messaging appropriately.

Create avenues to share your story.

- Develop a website.
- Capitalize on speaking opportunities.
- Collaborate with other similar organizations.
- Incorporate your story into core collateral materials.
- Use professional networks such as social work, nursing, public health and oncology.

Promoting yourself and your organization can be done through a number of strategies, venues and styles. By learning the strategies to the left, you can make decisions that are best for your organization and are tailored for a specific need or event.

Marketing, Communications and Public Relations

Promote Yourself

FIND WAYS TO PROMOTE YOUR MATERIALS

Developing, maintaining and having a booth presence at events is a necessary strategy to create awareness and educate your community about your organization. Booths are also a great way to build a database of potential donors and volunteers. They help to increase awareness of your organization within the community. When planning for a booth presence, consider the following:

- Determine what the purpose of having a booth presence at that particular event is. Are you trying to build awareness of your organization? Are you attempting to recruit volunteers? Are you looking for potential donors? Have a call to action when people approach the booth.
- Set up a booth at events that are attended by the same audiences you are trying to reach. Think outside of the box. Events at which you may consider exhibiting could include conferences attended by health professionals who work with cancer survivors, employee health and wellness or benefit fairs and community events such as festivals.
- Plan in advance. You will often save money and unnecessary stress by planning well in advance. Depending on the type of event you are attending, you may need to reserve booth space, order furniture or create specific materials to be distributed.
- Consider investing in a table cloth and signage that includes your organization's logo that can be reused at different events. It will make your booth recognizable and more credible.
- Arm your booth representatives with talking points about your organization, its services and ways to get involved. Target the talking points appropriately to the audience in attendance at the conference.
- To help booth visitors remember your organization once they return home, consider distributing collateral materials and giveaway items that are relevant to the conference, its attendees and the messages you aim to communicate.

Bring some sort of giveaway that will draw people to your booth and require people to do something—sign up for your newsletter, complete a survey to provide feedback, take information about your organization—in exchange for that item.

Marketing, Communications and Public Relations

Promote Yourself

Remember, any collateral piece is only as good as its accompanying distribution plan.

FIND WAYS TO PROMOTE YOUR MATERIALS

- While it is important to distribute collateral at your booth, it is not always the quantity that matters. Having quality conversations with several people will go a longer way in making an impact in your community and educating people on what your organization does.
- Bring some sort of giveaway that will draw people to your booth and require people to do something—sign up for your newsletter, complete a survey to provide feedback, take information about your organization—in exchange for that item.
- Collect names, addresses and e-mail addresses of anyone who approaches your booth and have a system of follow-up in place. Send them an e-mail thanking them for stopping by or add them to your newsletter distribution (with their permission, of course). Develop a relationship with these people in order to get them more involved with your organization.

DEVELOP COLLATERAL

To support your organization and get the message out there about the work you are doing, develop collateral and educational pieces. By developing "boilerplate" language, you create a guide on how your documents should appear. You should be able to copy and paste from this template and use in materials or in promotion of your organization. You may find that you need collateral pieces for different reasons. These may include:

- Overview of your organization
- Event promotion
- More detailed description of select programs
- Reports on your successes
- Educational materials related to your services
- Annual reports on your financial status

Remember, any collateral piece is only as good as its accompanying distribution plan. Develop collateral based on a need to share information about your organization through well-thought-out distribution channels.

Marketing, Communications and Public Relations

Maximize Your Reach

Technology can increase your organizational capacity, enhance your effectiveness in communication and reach new audiences.

USE TECHNOLOGY

Technology allows nonprofits to develop a larger reach and have a greater social impact. Technology can increase your organizational capacity, enhance your effectiveness in communication and reach new audiences. With complex databases and an abundance of information available online, computers and software systems are increasingly important to nonprofits.

Some examples of technology that can enhance your organization are:

- Electronic newsletter and email updates
- Library of resources for a specific group
- Order forms for collateral and educational materials
- Storage of constituent database to track contact information, participation in organizational events and other relevant information
- Online data collection through surveys, analysis tools and evaluation
- Website that describes and promotes your organization
- Interactive website capabilities, such as blogs, chat and message boards and search functions
- Utilization of conference call lines
- Updated computers, printers, software, fax machines, projectors and televisions

UNDERSTAND AND LEVERAGE SOCIAL NETWORKING TOOLS

Social networking tools are a great way to connect with those that may be interested in your organization and your cause. The tools are almost always free and user-friendly.

The following are social networking tools:

- *Twitter*: A "microblogging" tool that allows you to talk to and post notes to your friends in 140 characters or less. It can be used as a way to promote an event and share your efforts, but most importantly, to build community. Twitter is a free service.
    - www.twitter.com
    - Twitter in plain English: www.youtube.com
- *Facebook:* A social networking site. You can create a profile for your organization, a "fan" page or a group that is open or closed to the public. There are options to create events and send invitations to your friends and fans. Facebook offers applications for photo albums, video uploading and more. Facebook is a free service and there are add-on services to assist in promotion that you can purchase.
    - www.facebook.com

Marketing, Communications and Public Relations

Maximize Your Reach

Important things to remember with social networking:

- *Use it as a way to understand your audience.*
- *Build community by being casual and real.*
- *Don't forget that you are having a conversation with your constituents. It's not just a promotional tool. It's a 50% proactive communication and 50% reactive.*

UNDERSTAND AND LEVERAGE SOCIAL NETWORKING TOOLS

(continued)

- *MySpace:* Similar to Facebook, this social media networking site requires a little more basic programming knowledge. MySpace is a free service.
  - www.myspace.com
  - Social networks in plain English : www.youtube.com
- *Video Sharing:* Video sharing allows you to upload your videos and share with others. You can use video sharing sites, such as YouTube, to upload and organize videos. Upload videos are posted to a profile channel that you have created. The channel can be associated with a business type (such as nonprofit). YouTube can also be embedded into a MySpace or Facebook page using special applications designed for those sites. YouTube is free to set up, but if you would like to make your account more robust, you may choose a number of promotion opportunities for a fee.
  - www.youtube.com
- *Blogs*: A blog is a great way to share your organizations news. You can allow your readers to post comments about each of your entries to foster dialog and community. There are many templates you can use for creating a blog. Some of the blogging platforms include Blogger, Word Pres and TypePad. Depending on how much space you need, there may be a charge associated with setting up an account. Check with each site for details.
  - www.blogger.com
  - www.wordpress.com
  - www.typepad.com
  - Blogs in plain English: www.youtube.com
- *Online Photo Sharing:* Online photo sharing allows you to upload your photos and share with others. You can use photo sharing sites, such as Flickr or Kodak Gallery, to upload, organize and share photos with your supporters. You can also comment on other photos and allow people to comment on yours. Flickr provides crop, fix and edit capabilities. Just like YouTube, you can download a special application on your Facebook or MySpace accounts, as well as your blog, that will allow a Flickr photostream to live on your page.
  - Online Photo Sharing in plain English: www.youtube.com
- *Social Bookmarking Sites*: Applications, such as Delicious, Digg and Technoratti, can allow you to capture news story urls and place them on your website. These services are free. People can use these services to "favorite" your blog or articles written about your organization
  - Social Bookmarking in plain English: www.youtube.com

Marketing, Communications, and Public Relations

Maximize Your Reach

Bring some sort of giveaway that will draw people to your booth and require people to do something.

UNDERSTAND MEDIA OUTREACH AND PUBLIC RELATIONS

Media and public relations are also crucial parts of marketing your organization and message. It is often a good idea to develop key messages that can be used and reused with the press and public. This not only makes your message consistent and clear, as you want your branding to be, but also provides you with easy responses to press inquiries. Understanding the types of media, as well as best strategies for talking with the media, is key. You will also want to learn how to develop an effective press release. The following outlines methods for effective media outreach.

Public Service Announcement (PSA)

A Public Service Announcement is a non-commercial advertisement used to inform and persuade the public about an issue, program or activity. They are short messages that are produced on film, script or video tape and given to radio and television stations for broadcast. The broadcast media are required by the Federal Communications Commission (FCC) to serve "in the public interest" and most stations use PSAs to meet this requirement. A PSA is commonly used by nonprofit organizations, federal, state or local governments. If your message is short (most PSAs are approximately 30 seconds in length), and you have a specific announcement to make, a PSA could be an excellent resource.

PR / Marketing Firm That Offer Pro Bono Services

To find a firm in your local community that may offer pro bono services the following link may be helpful. Find the firm and make direct contact with them to ask if they offer this service. Many PR firms will.

Media Campaign

To develop a media campaign you will need to identify your target audience and what message you want to publicize. Decide where your story would be most effective and what form of media you want to utilize (radio, television, magazines, newsletters, email bulletins or trade publications). Familiarizing yourself with the websites of local media will help determine where to place your message.

Marketing, Communications and Public Relations

Maximize Your Reach

Once the media has been identified, organize a media list that should include names, titles and contact information.

UNDERSTAND MEDIA OUTREACH AND PUBLIC RELATIONS

(continued)

Once the media has been identified, organize a media list that should include names, titles and contact information. You will also want to be aware of required formatting for submitting material and a schedule of deadlines.

Finally, your message will need to be created. This should be in the form of a press release, media advisory, PSA, letter to the editor or op-ed. Create a clear, concise message that will catch the attention of the editor. It's usually best for your first contact to be via email and then, if the media hasn't responded, follow up with a phone call to confirm that they received your material and elaborate on your event or message.

Helpful tips for creating your message:

- Some magazines have lead times as long as six months, so it's best to consider that when planning your media campaign.
- Identify media.
- Organize media lists (contact information) four to eight weeks prior.
- Contact media to request format submission requirements and deadlines.
- Write press releases, articles, and PSAs two to six weeks prior.
- Send media material based on deadlines.
- Phone call follow-ups can take place after material is sent and on the date of the specific event.
- Distribute media advisory day prior to event.
- Send out followup email reminders or make calls to remind people.
- Issue your press release on a Tuesday, Wednesday or Thursday.
- If possible, avoid holding an event on a Monday. People are more likely to forget over the weekend. Give yourself an extra day at the beginning of the week to send them a reminder.

Marketing, Communications and Public Relations

Maximize Your Reach

DEVELOP A STRONG BRAND

Your brand is more than just your logo. The logo is often the visual piece of your brand, but your brand encompasses so much more. Your brand is how and what people convey in their mind when they think of your organization. Your brand should distinguish you from other cancer organizations. It is the intangible asset of your organization that provides the essence of what your organization provides and who you serve. If possible, seek out assistance from firms and studios that offer this creative service. The way a brand looks can truly turn people on (or off) during their first few exposures.

Create your brand by:

- Determining what your message is
- Determining what you want to be and who you want to reach
- Making yourself memorable or differentiating yourself
- Developing a tagline, jingle or slogan
- Creating a visual image (symbol or logo) reflective of your style, attitude and color
- Seeking out all appropriate opportunities for brand exposure
- Providing the same basic message regardless of media outlet
- Thinking through the unanticipated outcomes of your brand and planning for that

Your brand should:

- Help your constituents understand who you are
- Evoke loyalty, quality, awareness and associations
- Establish yourself in the cancer community
- Be used throughout all of your printed or online materials
- Once established, be able to stand on its own
- Deliver a clear message
- Confirm credibility
- Connect emotionally to the user
- Motivate the audience
- Establish standards of consistency

Traits of a good brand:

- *Organizational not individual*
- *Show personality*
- *Create emotion*
- *Are shared by word of mouth*
- *Provide excellent customer experience*

Marketing, Communications and Public Relations

Maximize Your Reach

DEVELOP A STRONG BRAND

(continued)

Legal restrictions and appropriate use of logo and branding.

Create a "Terms of Use" and/or style guide for your organization. This guide should discuss issues such as minimum size of the mark, not manipulating the scaling or the color and where and when it should be used. The guide should be displayed on the website or provided to partnering organizations as needed. This will ensure proper use of logos and information. In addition, it will assist in accurate representation of the organization. Also, review your style guide and usage with all internal staff in order to ensure they are using your mark correctly. Consider trademarking your brand and be sure you are not violating someone else's trademark. There are so many similar phrases in the cancer community; you will want to acquaint yourself with the various ones.

Consider trade marking your brand and be sure you are not violating someone else's trademark.

RESOURCES:

- Nonprofit Technology Enterprise Network (N-TEN) promotes technology use in nonprofits.
  - www.nten.org
- Techsoup provides technology information for nonprofits.
  - www.techsoup.org
- Google Grants provides free AdWords space for qualifying nonprofits.
  - www.google.com
- Npower is a nonprofit whose mission is mobilizing the tech community and providing individuals, nonprofits and schools access and opportunity to build tech skills and achieve their potential.
  - www.npower.org

Pro bono marketing services.

- www.prfirms.org

SECTION 6: CONDUCTING COMMUNITY OUTREACH

Community outreach involves the strategies that you employ to educate people about your organization, the services you offer and the ways that you can engage your community to seek out their needs. In this section, you will learn about strategies to reach out to underserved communities, as well as how you can best promote your resources and work collaboratively with other organizations and partnerships.

Understand Your Community

Build Partnerships

Be Strategic and Facilitate Public Engagement

Outreach to Underserved Populations

Conducting Community Outreach

Understand Your Community

REACH OUT TO THE UNDERSERVED

Know your audience and the underserved populations that exist within your community.

- Who is your primary demographic?
- Does it change according to the funding source?
- Do you have different programs targeting a variety of demographics or are you focused on one?
- Reach out to your community members who have limited access to your services. It is important to identify your consistent supporter base and the groups that can and would benefit from your services but do not have access to them. It is also important to identify ways that you can alter your programs and services to meet the needs of underserved communities.

GATHER INFORMATION

In order to develop programs or strategies that are relevant and appropriate for reaching your target population, ask yourself the following questions:

Are there existing organizations that serve this population that we could partner with?

- For example, recruitment of non-survivor volunteers for buddy programs or in-school assistance may be accelerated when partnering with existing volunteer or service hour opportunities, such as the National Honor Society or faith-based youth groups.

Are there existing reports that would help us better understand our population?

- For example, if you chose to conduct outreach to adolescents and young adults (AYAs), a good starting point would be to review reports and research that have identified the gaps that exist within this population.

Is there existing infrastructure that would help us to communicate with this population?

- For example, recruitment of AYA survivors may be aided by utilizing existing communication resources, such as provider list serves and other support services utilized by this population.

Disparaged communities exist across many spectrums. Some of these include:

- *Age*
- *Socioeconomic status (SES)*
- *Geographic region*
- *Race*
- *Ethnicity*
- *Sexual orientation*
- *Culture*
- *Religious affiliation*
- *Education levels*
- *Sex/gender*
- *Cancer type*

Conducting Community Outreach

Understand Your Community

GATHER INFORMATION

(continued)

Are there unique barriers or challenges experienced by this population?

- For example, when recruiting high school students for participation in programs, be mindful of the school calendar and where your programs may fit best and with the least competition from large events and vacations.
- Identify ways to lower or decrease expenses associated with travel, which is a common barrier to participation for this age group.
- Do not schedule programs during traditional work or school hours.

Does this population have any preferences that would impact your outreach strategy?

- For example, AYAs often do not want their parents involved in their activities.
- AYAs are resistant to programs labeled as 'support groups.' It is easier to accrue participants by marketing your activity rather than the support that comes with it.

ENGAGE YOUR COMMUNITY

Create local organizing committees with members of the community. This can help them feel invested. Ask for and listen to feedback from your community on what's needed, what's realistic, what's plausible and how your efforts can be reached.

Recruit volunteers :

- Learn the basic steps you will need for each volunteer role. This includes planning, organizing, staffing, directing and controlling.
- Ensure that volunteers know what they are doing by properly training and explaining the program or project they are working on.

RESOURCES:

- National Cancer Institute Progress Review Groups and Reports
  - www.planning.cancer.gov
- National Action Plan for Cancer Survivorship
  - www.cdc.gov
- Interculteral Cancer Council
  - www.iccnetwork.org

Ask for and listen to feedback from your community on what's needed, what's realistic, what's plausible and how your efforts can be reached.

Conducting Community Outreach

Build Partnerships

When considering collaboration with other organizations, ask yourself these questions:

- *Are there other organizations or health care professionals in your community that serve people affected by cancer?*
- *What types of services do they provide?*
- *Are there obvious opportunities for collaboration?*

IDENTIFY OTHER ORGANIZATIONS

Identifying partners in your community:

- Look beyond the cancer community and engage representatives of the other pieces of your program: e.g. if you are addressing nutrition, bring in the growers and grocers. Look at what is being done in the community and who supports it. See where you fit and engage those with synergy.
- Engage at the local level, not only corporate headquarters. You are much more likely to get an enthusiastic response from a store manager looking to do something positive in the local community. This can help with both fundraising and in outreach to participants and volunteers.
- Know what your "ask" is going to be and keep it short. If they say no to something big, then go back and ask for something smaller.

Partnering with other cancer-related organizations and health care professionals is not only financially efficient, but also ensures that organizations are working together to meet the needs in your community.

The Centers for Disease Control and Prevention (CDC) has supported the development and implementation of cancer plans in each state, tribe or territory. These plans provide a strategic framework to address the specific needs of the cancer community. To facilitate the implementation of these plans, state, tribal or territorial health departments, invite health care professionals, community-based organizations and others to meetings to ensure the activities included in the cancer plan are executed. These meetings also provide participants an opportunity to discuss rising needs in their community, develop partnerships with other organizations and prevent duplication of services within their community.

If an opportunity to collaborate with another organization arises, it is important that you take the time to build a solid and strong relationship with one another. Partnerships provide an opportunity for both organizations to have an equal share in the development and implementation of the program or product. You should work together to set the goals and objectives to ensure that each organization has an opportunity to provide feedback. When the program or product is developed, it is very important that both organizations are given credit for their work.

Conducting Community Outreach

Be Strategic and Facilitate Public Engagement

Public engagement can be significantly advanced through the use of the following functions:

- *Online surveys*
- *Internet forums*
- *Blogs*
- *Social networking and virtual communities*
- *Group communication tools*

BE STRATEGIC

Be strategic in how you grow and what populations you can serve within your resources. Smart growth is more important than fast growth. Start with one existing demographic and build from there. Establish a program that works and develop a smart growth plan.

Understand the resources you have to promote your program through outreach strategies. Creating ways to drive people to your website is helpful in promoting your organization and reaching out to other people in need. If funds are available, consider a targeted mail campaign to other community-based organizations, cancer treatment centers or health care providers that serve your target population.

Understand and utilize the strength of your program. For example, if you have an arts program, utilize the artwork from your programs to attract others to it. Leverage existing partnerships to recruit help in promoting the artists and their personal messages too. Facilitating outreach can occur through multiple channels. Whether it is email, phone or mail, keep in mind that some underserved populations may not have access to certain methods of communication and outreach. Utilize the outreach venues that your targeted population would have access to.

FACILITATE PUBLIC ENGAGEMENT

As use of the Internet continues to grow innovative technologies are creating new ways of engaging and maintaining the public's involvement. Advances in technology have opened the door to reaching new constituencies, creating spaces for sharing ideas and taking action and offering opportunities for increased communication.

Depending on your community, your partnerships and your resources, some or all of the above may be a good fit. While it is important and necessary to engage your community, you want to do it in a forum that they have comfort, familiarity and trust with.

Conducting Community Outreach

Outreach to Underserved Populations

OUTREACH TO UNDERSERVED POPULATIONS

The following are recommendations for working with specific populations or programs.[1]

- Create culturally relevant materials and services for minority and medically underserved populations. Identify ways to lower or decrease expenses associated with travel, which is a common barrier to participation for this age group.
    - Programs and resources for minority populations, which were well-received, were created with input from members of the community and addressed the specific needs of the community. For example, local idioms were considered for translated materials.
- Train health care professionals on cancer survivorship in a way that also values and benefits them professionally. Training health care professionals shows evidence of being an effective way to reach a small number of people who could impact a large number of cancer survivors. Efforts were most successful when:
    - Continuing education credits were provided for certified staff.
    - Course credit was built in and time was allotted for participation for students.
    - Professionals had the opportunity to see, firsthand, the effects of programs (this also helped increase referrals of survivors to programs).
    - Professionals were engaged in all aspects of programs from creation through implementation (this also helped increase referrals of survivors to programs).
- Provide pediatric, adolescent, young adult (AYA) and adult cancer survivors with the opportunity to engage in physical fitness and nutrition programs. Cancer survivors of all ages reported, in the short term, an improvement in their overall physical and mental health as a result of participating in programs targeting physical fitness and/or nutrition. Efforts were most successful when highly trained staff provided physical fitness activities or guidance on nutritional programs, especially when specialized programs were developed.

Train health care professionals on cancer survivorship in a way that also values and benefits them professionally.

[1] Community Program Portfolio Analysis report 2007, LIVE**STRONG** Foundation, Rechis-Oelker, PhD, Potts, MSW, MPH

Conducting Community Outreach

Outreach to Underserved Populations

OUTREACH TO UNDERSERVED POPULATIONS

(continued)

- Special considerations were taken for the amount of physical involvement required, especially with on-treatment survivors.
- Timing was taken into consideration in multiple ways. First, cancer survivors may need physical support after participating in physical activity programs and may need a loved one to care for them, so programs may need to be offered after work hours. Second, especially for on-treatment survivors, it may not be possible to attend 12 sessions over 12 weeks due to general life constraints, as well as treatment effects. Programs that offered multiple sessions to select from (i.e. participate in 10 or 12 sessions) were more likely to see participants attend all sessions and benefit the most from those sessions.
- Standardized measures were used to assess outcomes, or at least results were easier to understand. One cautionary note is that participants must be willing to take such measures and the group size must allow for measures to be used.

Address the educational needs of children and AYAs with cancer. Programs addressing the educational needs of children and AYAs were developed fairly inexpensively and with a great deal of success. Efforts were most successful when:

- Trained staff was involved in all efforts.
- School professionals were aware of and engaged in meeting the needs of cancer survivors.
- Cancer survivors were made aware of the potential late effects of surviving cancer and options for future success (i.e. programs for college and job placement assistance).

Cancer survivors of all ages reported, in the short term, an improvement in their overall physical and mental health as a result of participating in programs targeting physical fitness and/or nutrition.


Leon, 60, Prostate Cancer Survivor

SECTION 7: UTILIZING ADVOCACY SKILLS

Advocacy can occur at the grassroots level in local communities and towns, as well as on larger scale levels such as lobbying on Capitol Hill. All of these methods can affect your organization, the constituents you serve and the mission that governs your direction. In this section, you will learn how grassroots advocacy can help your organization make an impact on issues that are important to your mission.

What is Grassroots Advocacy?

Grassroots advocacy is a way to systematically connect all of us who care about cancer and create mechanisms for us to work together to make a difference.

Understanding and Influencing Policies

Whether it is legislative policy that dictates the level of funding a research project receives or a private health insurance policy about which treatments are covered, policies affect cancer outcomes.

Utilizing Advocacy Skills

What is Grassroots Advocacy?

WHAT IS GRASSROOTS ADVOCACY?

The LIVE**STRONG** Foundation defines grassroots advocacy as building and maintaining a permanent network that unites people affected by cancer as voices for change to develop grassroots skills, cultivate local leadership around cancer issues and empower individuals for collective action.

Put simply, grassroots advocacy is a way to systematically connect all of us who care about cancer and create mechanisms for us to work together to make a difference.

Whether you are raising money to support research, educating your community about issues, creating new services or advocating with elected officials to increase funding for cancer programs, you are a grassroots advocate. Your grassroots network can act to create change in policy or practice around cancer issues in the health care, public policy, research and community arenas.

Building power by organizing a strong base of grassroots advocates will demonstrate that there are many people who care about an issue, and those people are taking action to create change. The more people that actively support your work, the more influence you will have on decision makers whose support you need.

RESOURCES:

LIVE**STRONG** Foundation: Grassroots and Advocacy support

- www.livestrong.org

Who can your network influence?

- *The media*
- *Elected officials*
- *Opinion leaders*
- *Health care providers in your community*
- *Members of your family or community*
- *Your personal stories can illuminate problems and point to solutions in a way that no statistic can match.*

Utilizing Advocacy Skills

Understanding and Influencing Policies

When you are deciding what project you want to take on, think about how your actions cannot only help that issue, but also help to build momentum and strength.

UNDERSTANDING AND INFLUENCING POLICIES

Whether it is legislative policy that dictates the level of funding a research project receives or a private health insurance policy about which treatments are covered, policies affect cancer outcomes.

That is why policy—public, private, federal and local—is an important part of solving cancer-related issues. By getting involved, you are making sure your community leaders are representing you. For the following examples, an individual solution may exist, but there also may be a better system to put in place that would eliminate or reduce the problem for all people affected by cancer. This could require some change in policy or practice.

- A treatment center could rearrange its appointment schedule to accommodate multiple patients from a particular area and offer transportation service to and from that area on treatment day to alleviate stress for the patients and their families. The center also could provide a mechanism for those patients to get support from each other during their treatment trips.
- An insurance carrier could change its reimbursement policies to be more inclusive of a variety of cancer treatments or a state could mandate by law that insurance companies cover certain treatments.
- A state university system could create a campus cancer program for students at all of their college campuses and extension offices.

These examples illustrate how an individual problem is actually a cancer issue and that cancer issues can be alleviated or resolved through policy change.

CONSIDERATIONS FOR POLICY PRIORITIES

When you are deciding what project you want to take on, think about how your actions cannot only help that issue, but also help to build momentum and strength. There may be local or regional issues that you want to tackle.

Consider if those projects:

- Have a human face or story to tell that helps people relate to the problem on a personal and emotional level. This could increase your chances of getting their support and involvement.
- Have broad appeal not only to the people you are working with, but also to others in the community affected by cancer, so that they will be more likely to join you.

Utilizing Advocacy Skills

Understanding and Influencing Policies

Government systems are complex; therefore, designating one individual to monitor public policy will assist in educating other employees, constituents and affiliates.

CONSIDERATIONS FOR POLICY PRIORITIES

(continued)

- Have a local angle. Often people are more motivated and interested in their own communities than they are in a place in which they are not familiar.
- Establish priorities that are easy to explain and understand so that you are not bogged down in technical jargon or confusion within the grassroots ranks.
- Inspire passion in your most deeply committed advocates so they will stick to it and convey their energy to others.
- Set priorities that can be influenced in a realistic amount of time (months vs. years). That way you will be able to celebrate victory and achieve a solid sense of accomplishment.
- Have a clear solution to advance. Pointing to problems without solutions is demoralizing.
- Associate with an identifiable decision-making body, such as a board of directors or elected body. This will give you individual people you can go to if there is a need to make changes.
- Lend themselves to a clear victory that you will be able to celebrate and publicize.

UNDERSTANDING HOW POLICY DECISIONS ARE MADE

Having a person designated to address public policy for the organization is valuable. They are dedicated to observe, understand and explain the impact of public policy. This person can also lead lobbying efforts if and when necessary. Lobbying is any activity designed to influence a decision maker toward a desired action, most often through legislation. Organizations need to make sure that they follow all relevant local, state or federal laws before engaging in lobbying activities.

Government systems are complex; therefore, designating one individual to monitor public policy will assist in educating other employees, constituents and affiliates.

Before beginning any advocacy activity, you must have a sound understanding of the issue and process you are seeking to influence. Research how an issue is decided and who will inform your strategy every step of the way. This is true whether you are seeking to change public policy, such as a law or ordinance, or private policy or practice such as the delivery of a service, administration of an insurance plan or dissemination of a human resource benefit. The key to good research is obtaining adequate detail.

Utilizing Advocacy Skills

Understanding and Influencing Policies

UNDERSTANDING HOW POLICY DECISIONS ARE MADE

Who makes the ultimate decision about your issue?

You will need to identify those people directly involved in making decisions about the issue—individuals, committees, departments or groups who can facilitate, approve and/or ensure the change you seek.

Examples of decision makers:

- Elected officials, such as state or federal legislators, mayors, county commissioners, city council members or school board members
- Officials who are either elected or appointed, such as library or park board members, or health department administrators
- Boards of directors of for-profit or nonprofit organizations, such as hospital, insurance company or nonprofit boards
- Employers, human resource directors, institution staff (such as school superintendents, principals, presidents or staff)

What is the process required to change the issue you are working on?

- Use these guiding questions to clarify the decision-making process:
    - Can individuals submit a request, or does a member of the decision-making body have to introduce the change?
    - What individuals can make a request?
    - Once a request is in motion, what are the steps? What is the timeline, and how can it be influenced (sped up or slowed down)?
    - Are there legal or regulatory guidelines related to your issue? If so, what are they, and how do they influence a change in policy?
    - Is public input allowed or required?

Map It

As this information is obtained, it may be helpful to "map" the process by creating a diagram that identifies each step and the individuals associated with each step. No matter how you contact a decision maker—whether it is by mail, in person or on the phone—your contact should be designed to persuade and motivate that decision maker to help. When you communicate with decision makers, there are several things you can do.

Use these guiding questions to identify your decision makers. Is it one individual or a committee?

If it is one individual:

- Is the individual elected or appointed? What are the terms?
- Can anyone override the individual's decision?

If it is a committee:

- How is the committee structured?
- Who votes and who doesn't?
- Does anybody have veto power?
- Are members elected or appointed? What are the terms?
- Do they represent anyone, formally or informally?

RESOURCES:

- Alliance for Justice
    - www.afj.org
- THOMAS has content such as Bills and Resolutions, Activity in Congress, Congressional Record, Schedules and Calendars, Committee Information, Presidential Nominations, Treaties, Government Resources and Voting Records
    - www.thomas.lac.gov

SECTION 8: DEVELOPING A SUSTAINABILITY PLAN

Sustainability results from the culmination of your efforts across all of the areas discussed in this toolkit. Sustainability measures can vary based on the organization, your program, what you are measuring and how you define success. Sustainability should reflect oversight of both long-term goals and day-to-day operations. In this section, you will learn more about the time, planning and energy required to sustain an organization or program.

How is Sustainability Different from Evaluation?

Evaluation is the process of determining the worth, merit and effectiveness of a program or product based on relevant standards that are typically set by the organization.

Developing a Sustainability Plan

How is Sustainability Different From Evaluation?

Identify strengths and weaknesses in the group you work with.

HOW IS SUSTAINABILITY DIFFERENT FROM EVALUATION?

Evaluation is the process of determining the worth, merit and effectiveness of a program or product based on relevant standards that are typically set by the organization. Sustainability is how you will maintain your organization for the long term. This may be through established fees, regular donors and endowments. While you may use the data you collect to inform donors, fulfill grant requirements and share with other stakeholders, it is only one part of you sustainability plan.

Managers need to ask and answer key questions about how their staff performs as a group, and how well managerial systems support their work. Identify strengths and weaknesses in the group you work with and act to increase your organization's ability to face challenges such as limited funding or inability to maintain long-term sustainability.

Key Components:
For an organization or program to survive and thrive over time, all of the following components must be in place:

- *Identity*: In addition to brand, your organization should have an identity that is defined through your mission and values.
- *Strategic Plan*: Your organization should have a plan for the foreseeable future. Over the course of the next five years ask yourself what areas, specific to your mission, you will focus on, what gaps your program will fill, how you will adapt to changes in your community and the economy, etc.
- *Evaluation Plan*: Your plan for the immediate future, your objectives, activities and timelines for programs currently being implemented.
- *Budget*: Your budget is your fiscal plan and should reflect your expected revenues and expenses. A good fiscal plan will focus on the current budget as well as reflect a long range fundraising plan that supports the activities outlined in your strategic plan, as well as a diversity of income streams and sources .
- *Personnel Plans:* Your program or organization should have a plan for cultivating and engaging your board of directors, staff and volunteers. Sustainable organizations invest in the people who invest in the organization. Consider long-term plans for rewarding initiative and creating a culture that is transparent and flexible.

Developing a Sustainability Plan

How is Sustainability Different From Evaluation?

One of the keys to sustaining as an organization is having a constituency who believes in your work and is there to support you.

SUSTAINABILITY WITHIN THE COMMUNITY

Sustainability is not just about money and planning. It is also about continuing to fill an indentified need in your community. It will be necessary to periodically reexamine your program and the needs of your community.

As your programs become more established, you will become more recognizable in your community. Look for opportunities where there is mutual benefit to partner with new segments of your community. How can the community rally behind your cause? Keep in mind that people support what they help create. Are there ways to engage more and more people in what you do? Can you get people in your community to care about your success? One of the keys to sustaining as an organization is having a constituency who believes in your work and is there to support you.

DEVELOPMENT AND UNDERSTANDING OF POLICIES

Internal Policies

- Internal policies should reflect who you are as an organization. For example, if working at a cancer organization, reflect that in your choices of health care plans, flexible time off, utilizing non-smoking hotels for travel, etc.

External and Health Policies

- Having a process in place to identify and review health policies and how they may influence your constituent base is important. For example, tracking of the health policies in Congress that influence health insurance rules and regulations, and developing positions and strategies specific to those policies.

MEASURING SUSTAINABILITY

An evaluation plan allows you to plan and implement your organizational objectives. Evaluation goes hand and hand with sustainability. Look to your evaluation results to see where you are being successful and where there is room for growth. These answers will help you plan to maintain your organization for the long term. By determining whether programs are reasonable, feasible or measurable, you are assessing your organization's sustainability.

Developing a Sustainability Plan

How is Sustainability Different From Evaluation?

MEASURING SUSTAINABILITY

(continued)

Is your sustainability goal specific to your organization, new initiatives, ongoing projects or all of these? While you do not need to choose program or organizational sustainability, you need to understand the differences in how they may be measured. One is just as important as the other.

You will need to include, in your planning process via your evaluation plan, what your short-term and long-term goals are for sustainability. These goals and your measurements can be developed with input from your board, your constituents and your staff.

An example using programmatic sustainability indicators is:
The tobacco control program that you developed and pilot tested this year:

- Had x number of participants compared with your goal of x.
- Saw prolonged smoking cessation in x% of participants.
- Raised awareness nationally and locally.
- Was selected for additional funding by a new grantor.

An example using organizational sustainability indicators is:
Your organization started with a small grant of $10,000 to pilot a program and recently received ongoing funding for a five-year project for $200,000 to continue those program activities.

- You have successfully developed your board, with the addition of x number of experts in x,y, and z program specific fields.
- Your program operates within budget, reporting $x spent, $y raised, and $z saved through in-kind donations.
- You have increased the number of funding sources from x to y.

RESOURCES:

Council on Foundations is to provide the opportunity, leadership and tools needed by philanthropic organizations to expand, enhance and sustain their ability to advance the common good.

- www.cof.org

Look to your evaluation results to see where you are being successful and where there is room for growth.


Sarah, 33, Two-Time Breast Cancer Survivor

SECTION 9: ADDITIONAL INFORMATION

- *Legal Resources Available for Nonprofits*
- *About the Community Toolkit*
- *Development Process*
- *About the LIVESTRONG Foundation*

Additional Information

Legal Resources Available for Nonprofits

Legal resources may be helpful during any stage of your organizational functions, activities, evaluation and growth. Click on the following links for more details.

The Legal Aid Society's Community Development Project (CDP) offers free legal assistance to qualified nonprofit organizations in New York City.

- www.legal-aid.org

The National Council of Nonprofit Associations (NCNA) is the network of state and regional nonprofit associations serving over 20,000 members in 41 states and the District of Columbia. NCNA links local organizations to a national audience through state associations and helps small and midsize nonprofits.

- www.ncna.org

The Martindale-Hubbell Lawyer Locator has a search form to locate lawyers specializing in nonprofit law.

- www.martindale.com

Volunteer Lawyers for the Arts is a New York-based organization that offers volunteer legal services to arts organizations and individual artists nationwide.

- www.vlany.org

Pro Bono Partnership offers pro bono legal services to eligible nonprofit organizations in the New York tri-state area that serve the poor and disadvantaged, primarily in the areas of health and human services, affordable housing, neighborhood revitalization and economic development.

- www.probonopartnership.org

Nonprofit Risk Management Center helps nonprofits cope with uncertainty, offering a wide range of services on a vast array of risk management topics (such as employment law).

- www.nonprofitrisk.org

Corporate Pro Bono gives qualified nonprofits the opportunity to create a listing for their organization, which can then be searched and viewed by lawyers looking to volunteer their services.

- www.cpbo.org

Look to your evaluation results to see where you are being successful and where there is room for growth.

Additional Information

Legal Resources Available for Nonprofits

STATE SPECIFIC LEGAL RESOURCES

Arizona

The Arizona Community Legal Assistance (ACLA) program provides free legal assistance (non-litigation) to new and existing charitable community organizations in the health and human service area.

www.vlparizona.net

California

California Association of Nonprofits has a classified listing of members providing legal services to nonprofits.

www.can.memberclicks.net

Colorado

Colorado Bar Association provides state legal information.

www.cobar.org

Connecticut

The Pro Bono Partnership is a provider of free business legal services, educational workshops and other legal resources to nonprofit community-based organizations located in Fairfield County and greater Hartford, Connecticut, the lower New York Hudson Valley, including Westchester, Orange, Putnam and Rockland Counties; and New Jersey.

www.probonopartnership.org

Georgia

Pro Bono Partnership of Atlanta's mission is to make the highest-quality legal representation available to your nonprofit organization.

www.pbpatl.org

Hawaii

VLSH provides legal help to nonprofit organizations that are unable to pay for such help and training for both emerging and existing nonprofits. Pro bono legal assistance is offered to organizations that have a combined program and operating budget of less than $1,000,000 and are involved in community-based economic development or are providing services to people who are low-income or "gap" group.

www.vlsh.org

Idaho

The Idaho Nonprofit Center maintains a directory of experts, including legal services at:

www.inc.memberclicks.net

Illinois

The Nonprofit Legal Assessment Program (NLAP) provides legal analysis, representation and technical assistance to established nonprofit organizations in the Chicago area.

www.nlap.illinoisprobono.org

Iowa

The Iowa Nonprofit Resource Center, with the assistance of the University of Iowa College of Law Legal Clinic, offer research and graduate assistants for consultations to nonprofit organizations in Iowa needing to strengthen their operational capacity.

www.iowagrantsguide.org

Additional Information

Legal Resources Available for Nonprofits

Louisiana
The Louisiana Association of Nonprofit Organizations maintains a consultant directory, searchable by expertise type including legal.
www.lano.org

Maryland
MVLS is the state's largest provider of pro bono civil legal assistance, having helped more than 40,000 low-income individuals.
www.mvlslaw.org

Massachusetts
The Lawyers Clearinghouse, founded by the Boston Bar Assn. and the Mass. Bar Assn., provides pro bono legal services to nonprofit organizations through several programs, including corporate and business related needs, employment law and risk management.
www.lawyersclearinghouse.org

Michigan
Community Legal Resources provides pro bono legal representation to Michigan nonprofit organizations that are working with disadvantaged communities and individuals who are unable to pay for traditional legal services.
www.clronline.org

Minnesota
LegalCORPS assists low-income owners of small businesses and small nonprofit organizations with high-quality legal services from volunteer lawyers.
www.legalcorps.org

New Hampshire
The New Hampshire Center for Nonprofits maintains a consultant directory, searchable by expertise type, including legal.
www.nhnonprofits.org

New York
Lawyers Alliance for New York's staff, Board, and volunteer attorneys are an unparalleled team of legal professionals who, together with our donors, are dedicated to improving the quality of life for people in low-income communities throughout New York City.
www.lawyersalliance.org

North Carolina
N.C. Center for Nonprofits offer services directly to all sizes and types of 501(c)(3) nonprofits and work closely with other local, state and national groups that assist nonprofits.
www.ncnonprofits.org

New Jersey
The Center provides leadership and services for New Jersey nonprofits and is an umbrella organization for all charities in the state. Through advocacy, education, capacity building programs and member services, the Center gives nonprofits the knowledge and tools they need to pursue their missions more effectively, strengthening nonprofits as individual organizations and as a community.
www.njnonprofits.org

Additional Information

Legal Resources Available for Nonprofits

Ohio
Ohio Nonprofit Resources is an online community of nonprofit leaders, consultants and trainers specializing in capacity building and technical assistance for nonprofit organizations. To be listed on this site, each consultant or trainer has received references from three non-profit clients. The site contains listings for consultants on legal issues.
www.c4npr.org

Oregon
The Nonprofit Association of Oregon provides 501(c)(3) organizations with resources, including pro bono legal advice on a variety of issues related to nonprofit governance and management.
www.nonprofitoregon.org

Pennsylvania
The Pennsylvania Association of Nonprofit Organizations maintains a consultant directory, searchable by expertise type, including legal.
www.pano.org

Tennessee
Knoxville Bar Association provides state legal information.
www.knoxbar.org

Texas
The Texas C-Bar (Community Building with Attorney Resources) is the only project of its kind in Texas, providing free business law services across the state to community-based nonprofits developing affordable housing and other much-needed services in low-income communities. Texas C-BAR, founded in 2000 with the support of the Texas Bar Foundation, provides three primary resources: free legal assistance, legal workshops and an online legal resource library.
www.texascbar.org

Utah
The Utah Nonprofit Association maintains a consultant directory, searchable by expertise type, including legal.
www.utahnonprofits.org

Washington
Wayfind, formerly Washington Attorneys Assisting Community Organizations (WAACO) will refer eligible organizations to volunteer attorneys who can help with matters ranging from maintenance of tax-exempt status to complex business contracts and transactions.
www.wayfindlegal.org

West Virginia
The HUB West Virginia maintains a resource directory, including legal.
www.wvhub.org

Wisconsin
The Wisconsin Nonprofits Association maintains a consultant directory, searchable by expertise type, including legal.
www.wisconsinnonprofits.org

Additional Information

About the Community Toolkit Development Process

The goal of this toolkit is to provide an opportunity to share best practices related to program development, implementation and evaluation, as well as information related to grants, advocacy, marketing and fundraising efforts.

ABOUT THE COMMUNITY TOOLKIT DEVELOPMENT PROCESS

There is a growing community of LIVE**STRONG** Foundation grantees, including past and current recipients. Grantees often seek financial support from the Foundation. However, they also request technical guidance, capacity building information and education. The LIVE**STRONG** Foundation has previously provided support through various contacts and online support systems including MY.LIVE**STRONG**, quarterly teleconferences and email communication, as well as an annual conference.

Based on feedback received via surveys of the Community Program Grantees and evaluations from conference attendees, the Foundation determined that a larger need for support continued to exist. In response to this need, LIVE**STRONG** developed this toolkit. Its purpose is to provide further technical assistance that can enhance the knowledge, experience and confidence of LIVE**STRONG** grantees.

The goal of this toolkit is to provide an opportunity to share best practices related to program development, implementation and evaluation, as well as information related to grants, advocacy, marketing and fundraising efforts. The topic areas were selected based on an identified need for information, materials and resources to support the success of nonprofit cancer-related organizations.

The toolkit also provides an opportunity to enhance collaboration among partners in the cancer community by encouraging a resource-sharing mechanism. These benefits will ensure that duplication of services, products and programs will be minimized. It will also increase the amount of high-quality education and informational materials available to organizations and the cancer survivors they serve.

Additional Information

About the LIVESTRONG Foundation

The Community Toolkit could not have been developed without the extensive help of a panel of experts made up of previous LIVE**STRONG** Foundation Community Program Grantees. For six months, the expert panel worked with LIVE**STRONG** staff to brainstorm, guide and provide feedback and support in the development of this project. An additional group of experts were included later in the year to provide feedback and comments during the pilot testing phase.

The expert panel members included:

- Stan Golub, Reel Recovery
- Lindy Yokanovich, Cancer Legal Line
- DeeAnn Jones, Children's Chance
- Matt Brenner, Creative Healing Project
- Joanna Morales, Disability Legal Rights Center
- Melanie Goldish, SuperSibs!
- Brian Satola, The Ulman Cancer Fund for Young Adults
- Ronna Pomkin, Alliance of State Pain Initiatives

ABOUT THE LIVESTRONG FOUNDATION

The LIVE**STRONG** Foundation provides free cancer support services to help people cope with the financial, emotional and practical challenges that accompany the disease. Created in 1997 by cancer survivor and philanthropist Lance Armstrong, the Foundation is known for its powerful brand—LIVE**STRONG**—and for its advocacy on behalf of survivors and their families. With its iconic yellow LIVE**STRONG** wristband, the Foundation has become a symbol of hope and inspiration around the world. Since its inception, the Foundation has raised nearly $500 million to support cancer survivors and served 2.5 million people affected by the disease.

The toolkit provides an opportunity to enhance collaboration among partners in the cancer community by encouraging a resource-sharing mechanism.