



deliberations, decisions & planning

NATIONAL MEETING HIGHLIGHTS

October 16 -17, 2006 | Hyatt Regency | Washington, DC

“It felt like an historic event
and I was there.”

nonprofit congress
many missions, one voice

“This is something we have needed for a long time in our sector.”

“I’ve never before been energized by a conference. This one got me excited about my work again.”

“It was terrific to witness the energy and diversity of our field in such a tangible way, and to see widely recognized leaders sitting with locally powerful activists and doers in frank and productive conversation.”

“It wasn’t a moment. It was a mindset. I was really pleased to see that egos were left at home. Everyone I talked to and worked with focused on our sector as a whole instead of pushing for the interests of a particular subsector.”

“Everyone seemed to agree with the concept of true democracy, giving leaders of small organizations equal voice to those of the largest organizations.”

“I am hopeful that we will see some serious changes happen in our sector, we desperately need it. It is a watershed moment for us.”

“The concept and initiative of the Nonprofit Congress were very idealistic and ambitious – and it was an amazing success. So many nonprofits of different missions came together with a desire to learn from and truly listen to each other, it was an awesome accomplishment and an honor to be a part of.”

“This is just the beginning. There is much to be done.”



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All quotes are from session notes and attendee evaluations unless otherwise noted.

The Nonprofit Congress is an unprecedented effort to unite nonprofits and strengthen the charitable sector. The initiative is coordinated by the National Council of Nonprofit Associations (NCNA), the network of state and regional associations representing 22,000 nonprofits across the country. To learn more, please visit www.nonprofitcongress.org.

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acknowledgements

The Nonprofit Congress National Meeting would not have been possible without the support of committed leaders. This meeting was a culmination of a full year of hard work nationwide and we extend our appreciation to the many individuals and organizations that contributed to the Nonprofit Congress National Meeting, including:

- **Steering Committee members**—A group of visionary individuals who gave invaluable time and insight. Special thanks to Robert Egger and Michael Weekes for co-chairing this event and to Tim Delaney for his tireless contributions.
- **Town Hall conveners**—State associations, United Ways, universities, management support organizations and others played a critical role in shaping and building momentum for the National Meeting. Thank you for mobilizing your networks to engage in this effort.
- **Promotional partners** also played a key role in spreading the word to local groups about the *Declaration for America's Nonprofits*, the values survey, and of course, the National Meeting. There are too many groups to list here, but you have our appreciation.
- **Funders and sponsors**—Another group which deserves our deepest gratitude. Pamela Davis, president and CEO of the Alliance of Nonprofits for Insurance, Risk Retention Group and Nonprofits' Insurance Alliance of California jumpstarted our funding effort through a generous challenge grant on behalf of her members. We cannot thank her enough for her visionary support. Additional thanks go to the Bill & Melinda Gates Foundation, the Ford Foundation, and Rockefeller Brothers Fund for their critical investments.
- **Keynote speakers, facilitators, and educational session presenters**—Thank you for volunteering your time and expertise, and for helping to establish a high level of discourse throughout the National Meeting. A special thanks to Marcia Avner and Isabel Lopez for helping to design the facilitation plan.

Finally, and most importantly, thank you to the delegates and participants. You brought this meeting – and this movement – to life through your willingness to share, learn, and plan. Thank you for your hard work during the National Meeting and thank you, in advance, for all you will continue contributing to the Nonprofit Congress movement to strengthen the nonprofit sector.

introduction | about the nonprofit congress

In 2006, thousands of individuals engaged in the Nonprofit Congress, revealing a common and deep-seated belief: **the time has come for nonprofits to work together to address our common challenges and opportunities.** The accomplishments of the inaugural year of the Nonprofit Congress include:

Personal Declaration – Thousands of individuals from 50 states and the District of Columbia demonstrated their personal commitment to nonprofits by signing the *Declaration for America's Nonprofits*, a call to unite nonprofit sector (www.nonprofitcongress.org/declaration.htm).

Town Halls – Nonprofit leaders came together through 117 local Town Hall meetings in 43 states to identify shared values, challenges, and visions for the future, and to develop proactive solutions for reaching collective goals. Nonprofits of all sizes and mission-areas were represented at these local meetings. (For a summary of proceedings and results, view *Voices from the Field: The National Meeting Briefing Book*, available at www.nonprofitcongress.org/briefingbook.htm.)

Values Survey – Over 1,000 nonprofit leaders across the country participated in “Voicing Our Values: A Survey of the Guiding Principles of the Nonprofit Sector.” The survey was based on feedback from the Town Hall meetings and codified the shared values of nonprofits in order to solidify common ground for future collective action. (To view the contents and outcome of the *Values Survey*, visit www.nonprofitcongress.org/values.htm.)

National Meeting – The National Meeting marked the transition from dialogue to action. Over 400 nonprofit leaders from 47 states gathered in Washington, D.C. on October 16-17, 2006 to build on the work of the Town Hall Meetings. The goals of the National Meeting were to:

- Affirm the nonprofit sector's shared values
- Identify the 3 Top Priorities of the Nonprofit Congress for 2007
- Draft state action plans to address those priorities

The agenda of the National Meeting was structured around a series of working sessions during which individuals representative of the U.S. nonprofit sector worked together to meet these goals. *This report highlights the proceedings and results of this event.*

The intensive networking, prioritizing, and planning of the inaugural year of the Nonprofit Congress will culminate in coordinated action at the local, state, and national level. In 2007, state and local nonprofits will drive progress towards the goals of the Nonprofit Congress in order to strengthen the nonprofit sector from the ground up. Local actions will include additional Town Hall meetings as well as a host of other actions described in this document. See “Next Steps” on page 14 for more details.

national meeting highlights

educational sessions – LIGHTING THE FIRE

The Nonprofit Congress National Meeting began with educational sessions, exposing attendees to the latest thinking from key experts in the fields of advocacy, interactive technology, coalition building, marketing and branding, leadership and workforce development, resource development, and public opinion. These sessions were designed to provide a common understanding, and generate new ideas for strategies relevant to Nonprofit Congress decision making and implementation. *For a summary of these sessions, see Appendix B.*

opening plenary – OUR NONPROFIT SECTOR

Audrey Alvarado, executive director of the National Council of Nonprofit Associations and the Nonprofit Congress, kicked off the Opening Plenary by thanking the thousands of individuals in every state who had engaged in the Nonprofit Congress by signing the *Declaration for America's Nonprofits*, completing the values survey, and participating in the 117 Town Halls across the country.

Alvarado called on attendees to work together – both at the National Meeting and in their hometowns – to solve systemic social problems and bridge the country's rancorous political divide. "All of us in the nonprofit sector are passionate about our work, and those we serve are grateful—but that is not enough," she challenged. "The time has come to capture the wisdom and experience of those on the front lines to come up with systemic long-term solutions." Alvarado also noted the role of nonprofits in helping solve current political discord and make progress on issues that are critical to the communities we serve. "How can we move forward? How can we return to respectfulness, even in disagreement, that best exemplifies the democracy in which we all work, and recognize ourselves as working for the common good? We believe that the nonprofit sector of our society has a significant and, some would say, moral obligation to lead this movement. It is our hope and intention to do so through the Nonprofit Congress."

Alvarado and Nonprofit Congress co-chair **Robert Egger**, executive director of DC Central Kitchen, then unveiled the results of "Voicing Our Values: A Survey of the Guiding Principles of the Nonprofit Sector."



According to the survey, nonprofits' top values are:

- Dedication to the betterment of the communities we serve
- Commitment to serve others
- Ethics and integrity
- Catalyst for change and innovation

Attendees were reminded to keep the values in mind throughout the National Meeting deliberations.

Alvarado's address was followed by impassioned speeches from 5 Nonprofit Congress delegates representing the diversity of the nonprofit sector, including men and women from the arts, the faith community, human services, youth development, and healthcare. Each offered a perspective on the potential of the nonprofit sector and the Nonprofit Congress.



William Walczak, CEO of the Codman Square Health Center in Dorchester, Massachusetts, stated: “Our detractors perpetrate the myth that what we do is wasteful—that we are takers, not givers, to the economy...[but nonprofits] are united by the fact that we exist to improve the quality of life for the people of our communities, not for the financial gain of our shareholders. And that makes us different, indeed, more different every year. Our sector has gained a great deal of maturity. It is much larger and much stronger now than ever before, and our impact is huge and growing.”

Karen Chamblee Paisley, the producing artistic director of the Metropolitan Ensemble Theater in Kansas City, Missouri, spoke eloquently about the role of arts and culture in the nonprofit sector—and society at large—as a place where different groups can connect and draw strength. She referred to many in the nonprofit sector as “angels in their own communities.”

Charles Weathers, Sr., chair of strategic planning and community development of the South Atlantic Episcopal District AME Zion Church in Columbia, South Carolina, reminded attendees that all of us in the nonprofit sector operate from a position of faith. “Not faith from a religious standpoint, but faith as being that beyond-human ability to see with what is hidden from the eyes. For if we operated solely on what we see, many would be discouraged, distraught, and dismayed to the point of abandoning the mission.”

Elaine Gause, CEO of Girl Scouts of Utah in Salt Lake City, Utah, announced that Girl Scouts is creating one of the largest alumni associations in the nation and offered the Girl Scout movement as an example of millions of individuals connected – and strengthened – by a common mission and vision.

Cari Taylor, intern at the Mississippi Center for Nonprofits and Back Bay Mission in Jackson, Mississippi, spoke on behalf of emerging leaders in the nonprofit sector and beseeched those in attendance to make room for young leaders, imploring, “we are the ones who will carry on your legacy...and there is no kiddy table in the nonprofit sector.”

Robert Egger closed the session by challenging the attendees to be bold. He reported that, as he traveled the country over the last year, he has been heartened by the willingness of those in the nonprofit sector to explore new ideas and work in collaborative spirit. He challenged attendees to identify new solutions to existing challenges, look at familiar solutions with fresh eyes, and work collectively in pursuing our goals.

from the attendees

- “The session showed the many voices of the nonprofit sector.”
- “[The speakers] really addressed what we are all doing here and why we are doing it together.”
- “Great to see such diversity on stage to represent the diversity of the sector. Each had something different to offer in a different style.”
- “The energy level was the most important.”



working session I – DELIBERATION OF PRIORITIES

Monday afternoon, attendees met in small, intentionally diverse discussion groups to deliberate on the potential priorities of the Nonprofit Congress. The starting point for the sessions was the detailed *Voices from the Field: The National Meeting Briefing Book* (www.nonprofitcongress.org/briefingbook.htm) which outlined the seven possible priorities that emerged from 117 Town Hall meetings. The purpose of this session was for attendees to challenge each other to understand the root causes and long-term implications of the potential priorities before voting to establish the Top Priorities of the Nonprofit Congress.

The conversations were far-reaching. When asked, “What is the one idea expressed in this working session that stands out in your mind?” attendees gave the following responses:

- “The essential role of advocacy in the day-to-day work of the sector.”
- “We need to create a national public awareness campaign that speaks to our importance as a sector and how vital we are to each and every community we serve.”
- “We need to collaborate and stand together as a sector.”
- “The need to reframe our thinking about ourselves as nonprofits.”
- “The need to reaffirm the sector’s role in promoting social change.”
- “Nonprofit collaboration has to go beyond ‘being nice’ to ‘being strategic.’”

See Appendix D for a summary of notes from the Working Sessions.

97% of attendees “actively participated (contributed to the conversation) in this working session.”

from the attendees

- “A very wide variety of experiences at the table.”
- “Our group was excellent and diverse . . . we were very productive.”
- “My group was phenomenal; we worked very well together.”



National Meeting Attendees | There were two categories of attendees at the National Meeting: voting delegates and at-large participants. Voting delegates were nonprofit leaders that reflected charitable organizations nationwide. See the chart below for details.* At-large participants included elected officials, funders, consultants, and others. All attendees fully engaged in working session deliberations and planning.

	National Distribution of Nonprofits	Nonprofit Congress Delegates
Budget Size		
\$25,000 – 99,000	44%	20%
\$100,000 – 499,000	29%	26%
\$500,000 – 999,000	8%	10%
\$1,000,000 - 4,999,000	12%	21%
\$5,000,000 - 9,999,000	3%	5%
\$10,000,000 and above	4%	8%
(unknown)		10%
Subsectors		
Human Service	34%	36%
Education	18%	16%
Health	13%	5%
Arts, Culture & Humanities	11%	8%
Other**	24%	36%

*National distribution provided by the National Center for Charitable Statistics; data on delegates is self-reported.

** (i.e., community benefit, research, religion-related, environment, and capacity-building organizations)

vote on top priorities

Following the deliberations, delegates cast their votes for the Top Priorities they believed nonprofits should focus on to advance the nonprofit sector. (A sample ballot is below, displaying the total votes for each priority.) The 3 Top Priorities of the Nonprofit Congress for 2007 were announced at the Monday evening reception. The remainder of the National Meeting was dedicated to addressing these priorities.



The 3 Top Priorities of the Nonprofit Congress for 2007:

- **Advocacy & Grassroots Community Activities**
- **Nonprofit Organizational Effectiveness (especially accountability and leadership)**
- **Public Awareness & Support of the Nonprofit Sector**

nonprofit congress BALLOT

Please mark an "x" next to no more than three priorities, below. **Ballots with more than three priorities marked will not be counted.**

NOTE: If you choose to include "Nonprofit Organizational Effectiveness" among your top three choices, please also mark an "x" next to two of the seven sub-priorities listed in that section.

[244] Priority A: **Nonprofit Organizational Effectiveness**

- [109]** Accountability and Best Practices
- [87]** Leadership
- [48]** Organizational Structure and Governance
- [40]** Planning and Strategy
- [78]** Resources and Funding
- [75]** Results-driven Orientation, Evaluation, & Impact
- [20]** Workforce and Volunteers

[122] Priority B: **Advocacy and Grassroots Community Activities**

[92] Priority C: **Nonprofit Collaboration**

[71] Priority D: **Partnerships with Government & Business**

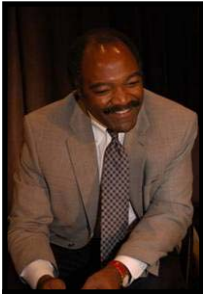
[201] Priority E: **Public Awareness and Support of the Nonprofit Sector**

[110] Priority F: **Social Change**

◀ **Potential priorities A – F (listed on ballot at left) emerged from the 117 Town Hall meetings held nationwide.**



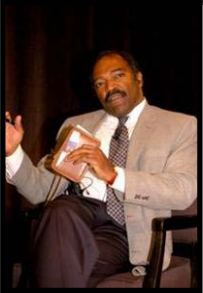
plenary – PERSPECTIVES ON THE PRIORITIES



Stacy Palmer, editor of the *Chronicle of Philanthropy*, moderated a provocative, early morning plenary featuring **William Schambra**, director of the Bradley Center for Philanthropy and Civic Renewal, Hudson Institute, a conservative-leaning think tank, and **Mark Lloyd**, senior fellow from the Center for American Progress, a progressive-leaning think tank.



Palmer asked the two panelists to offer their words of advice to the attendees as they headed into working sessions to address the 3 Top Priorities. Schambra cautioned attendees: “Don’t let the techniques and language of management lure you into imitating business.” He urged nonprofits to work from their strengths instead. “Participatory democracy is what nonprofits provide when they are at their best. You have what Americans want — a sense of community, of purpose, and belonging.” He suggested that it is a mistake to focus on restoring trust in government. “The nonprofit sector is identified with small, immediate community, and compassion. Government is viewed as distant, alienating, and unresponsive.”



Lloyd noted, “an important thing that nonprofits do is to have dialogue based in truth and honesty.” He proposed that nonprofits can further advance the notion that we are a republic of, by, and for the people, and that the nonprofit sector should strive to create change. Specifically, Lloyd urged nonprofits to follow the example of corporations by partnering and participating at a high level within government. Additionally, he encouraged nonprofits to push to create a federal agency to champion their interests, an entity similar to the Small Business Administration.



from the attendees

- “This was a very informative and revealing session. I think many things were said that others might have been afraid to say...[the] comments were very useful.”
- “It was good to hear commentary from the conservative side and the liberal side. It really demonstrated some of the assumptions that are made about the nonprofit sector and its views on politics.”
- “I would like to see...more of these kinds of discussions. The sector represents a big tent and we ought to be deliberate about making sure that differing perspectives are heard.”

working session II – PRIORITIES TO ACTION

Attendees reconvened in their intentionally diverse groups to plan national strategies for addressing the 3 Top Priorities. Planning began with identifying the fundamental change needed to successfully address the Top Priorities. Common themes emerged across the Priorities. As one attendee stated in the evaluation, “The Top Priorities all feed off and support each other.”

According to the attendees, the fundamental changes needed to address the Top Priorities include:

- “Changing the mindset of nonprofits” with regard to the importance of advocacy, public relations, and leadership
- “Moving beyond individual missions to unify in large numbers for common advocacy goals”
- “Speaking as a collective group to change the image of nonprofit organizations”
- Establishing “a unified voice that informs our publics”
- “Being recognized as a social and economic force, and as respected leaders”
- “Being recognized as an essential partner with private and public sectors”
- “Investing in the leadership of our sector”
- Ensuring “a greater distribution of resources and information to nonprofits” about leadership development programs, best practices, advocacy, and public and media relations

The attendees spent the remainder of the session brainstorming innovative ideas and identifying the best approaches to address the Top Priorities. Several themes emerged:

1. Communication and collaboration within the nonprofit sector
2. Education and training for nonprofit organizations
3. Cross-sector learning and relationship building with government and business
4. Coordinated campaigns and collective action
5. Public education and public relations
6. Research and materials development
7. Leadership and workforce development
8. Events and convening

For a list of specific strategies that emerged from the planning sessions, please see Appendix D.

99% of attendees “actively participated (contributed to the conversation) in this working session.”

plenary – USING OUR COLLECTIVE POWER

Nobel Laureate **Jody Williams**, a nonprofit leader who won the 1997 Peace Prize for her work, gave the keynote address. She shared strategies and insights from growing the International Committee to Ban Landmines (ICBL) from a coalition of two organizations with one staff member to a multi-national force with significant political power. Her role early on, and the secret to the success of the ICBL, was keeping already active organizations aware of what other groups were doing, and encouraging them to learn from each other and coordinate actions to magnify their collective impact. This strategy is analogous to the Nonprofit Congress, where leadership and drive are situated at the state and local level, and communication at the national level serves to support and connect those local efforts.

from the attendees

- “We had to move from thinking to action.”
- “We really got down to what was important.”
- “A member of the media joined us at the table, which emphasized our desire to be thoughtful, respectful, original, and representative.”



Williams reminded the attendees that it takes determination to wake up every day with the goal to make change. She also was direct about her lack of patience for individuals who don't act on their convictions: "If you are complaining about something but not doing anything about it, don't talk to me, don't waste my time." She argued that if she, a woman from a rural state who did not ride an escalator until age 25, could win the Nobel Prize at 47, then others can also affect change.



from the attendees

- "[Williams] is the epitomy of 'out of the box' which is how we all need to think and do."
- "Great reminder [of the] ripple effect and that we can make a difference."
- "Raw edginess reminding us that all it takes is one person to connect with an issue and others to promote change."
- "I appreciated the idea that 'you don't need permission' to implement something that is right."
- "Makes me believe I can make a difference in the world."

working session III – CHARTING THE COURSE

During the final planning session of the National Meeting, state delegations gathered to draft action plans for addressing the 3 Top Priorities once they returned home. The plans built upon the strategies that emerged from Working Session II, and included immediate and concrete actions:

- The New Hampshire delegation (in cooperation with other New England states) will hold a forum for 2008 Presidential candidates.
- The California delegation will create and launch a public awareness campaign for the sector.
- Delegations from Vermont and Oregon will build strong state associations of nonprofits.
- The Montana delegation will develop principles and best practices for nonprofits in their state.
- The Michigan delegation will educate nonprofits about regulations and strategies for effective advocacy.

See Appendix D for a summary of notes from the Working Sessions.

Most delegations committed to hosting a Town Hall meeting to engage other nonprofits in the work of the Nonprofit Congress. For more information about these Town Halls and to view state action plans, visit www.nonprofitcongress.org.



from the attendees

- "Coming together by state was invaluable for us."
- "We quickly agreed upon a concrete action."
- "I saw how relevant our work is to the progress of the sector. It was very rewarding."
- "I loved...learning what each of us knew about nonprofits in our state – it was all so different for each of us."



closing plenary – REALIZING THE VISION

During the Closing Plenary, each state delegation “shouted out” key action items from their state plans. In so doing, they committed to carrying the Nonprofit Congress movement forward and returning to the next National Meeting in the spring of 2008 to report on individual and collective impact.

In his follow up article on the National Meeting, **Frank Sietzen** of *The Examiner* described the scene in this way:

“Sometimes it sounded like a church meeting. Other times it took on the quality of a college seminar with students cramming for midterm exams. But at the end of the first-ever national Nonprofit Congress... what attendees really discovered was the power of group commitment... At the congress’ closing session, a standing-room only crowd of attendees clapped and shouted out their plans before each other like an old-style political convention. With cries of “Amen!” echoing back, each state delegation said what it would do to help move the sector forward.”



from the attendees

- “You could feel the energy.”
- “Excellent closure to a fun event with serious implications.”
- “All the action steps that were announced provided hope that the ideas generated...will materialize.”
- “Very motivating and left everyone feeling that each of us...had roles to plan personally.”

97% of attendees say, “The National Meeting met or exceeded my expectations.”

95% of attendees “met colleagues that I will contact in the future.”

93% of attendees “will encourage my colleagues to attend the National Meeting in spring 2008.”



next steps

After a full year of identifying our common challenges and opportunities, establishing priorities, and planning next steps, **now is time for action**. Between now (fall 2006) and the next Nonprofit Congress National Meeting in the spring of 2008, several types of actions will be taken to address the 3 Top Priorities.

- **Collective actions at the state and local level:** State and local groups will work together to identify and achieve a common goal. These goals may include advocacy or PR campaigns, systematic outreach and education efforts, or other strategies listed in Appendix D.
- **Individual actions:** Individuals are encouraged to take action to address the Priorities within their organizations or communities at any time. For example, an individual can write an op ed, volunteer to educate a nonprofit board about advocacy, or adopt best practices within his/her own organization.
- **National support and coordination:** NCNA will support nationwide efforts by facilitating communication and knowledge sharing among local groups, developing partnerships to extend the capacity and reach of existing efforts, and coordinating national strategies based on need and input from the field.

In order to achieve the mission of the Nonprofit Congress – to strengthen the nonprofit sector – it is critical that the strategies used to address the Top Priorities establish lasting knowledge, networks, and infrastructure within the nonprofit sector. The crosscutting goals of the Nonprofit Congress include:

- **Increasing Capacity:** develop skills and knowledge at all levels of nonprofit organizations, including staff, board, and volunteers; actively develop local leadership.
- **Growing Networks:** facilitate communication and relationships between diverse nonprofits at the local, state, and national level; create lasting nonprofit coalitions; build cross-sector relationships with government, business, media, and other stakeholders.
- **Inspiring Engagement:** encourage nonprofits to accept a leadership role in their local communities; ensure that nonprofits prioritize collective and proactive engagement.

These goals will not only help achieve impact toward the Top Priorities; they will benefit the nonprofit sector for years to come.

get involved

Join the Nonprofit Congress movement today!

Visit www.nonprofitcongress.org to:

- Post Your Big Idea to strengthen the nonprofit sector
- Read and respond to your state's preliminary action plan
- Attend or host a Town Hall meeting
- Sign up for periodic Nonprofit Congress updates

Be sure to check back for updates and new campaigns.



from the attendees

“[I will] integrate the Nonprofit Congress into my work and continue supporting my delegation’s efforts.”

“I will use the Nonprofit Congress as an example of collaboration and self-determination.”

“[I will] help to train new emerging leaders, providing them with various tools and on-going assistance enabling them to fulfill their missions.”

“I will double our public awareness efforts – make special efforts to educate [the] public and key stakeholders in the community.”

“I am meeting with executive directors of similar organizations...to drive more support for the movement.”

“I will increase focus on accountability and best practices in my own organization.”

“I will speak to civic organizations in my area on the value of our nation’s nonprofit sector and the Nonprofit Congress.”

“I am looking forward to working with colleagues to...hold a nonprofit awareness day in our state.”

“[I will] Ensure my nonprofit understands the Top Priorities and acts with them in mind.”



Steering Committee

- **Robert Egger**, DC Central Kitchen/Kitchens in National Cooperation, *co-chair*
- **Michael Weekes**, Massachusetts Council of Human Service Providers, *co-chair*
- **Audrey R. Alvarado**, National Council of Nonprofit Associations, *project director*
- **Chuck Bean**, The Nonprofit Roundtable of Greater Washington
- **Karen Borchert**, the Campus Kitchens Project
- **Siobhan Canty**, Greater DC Cares
- **Katie Burnham Lavery**, Society for Nonprofit Organizations
- **Mei Cobb**, Points of Light Foundation
- **Pamela Davis**, Nonprofits' Insurance Alliance of California (NIAC) & Alliance of Nonprofits for Insurance Risk Retention Group (ANI-RRG)
- **Larry Decker**, American Red Cross
- **Tim Delaney**, Center for Leadership, Ethics & Public Service
- **Marc Freedman**, Civic Ventures
- **Sheeraz Haji**, GetActive
- **Val Halamandaris**, National Association of Home Care & Hospice
- **Elizabeth M. Heagy**, Center for Lobbying in the Public Interest
- **Steve Jordan**, Center for Corporate Citizenship
- **Jeanne Bell Peters**, CompassPoint
- **Bill Strathmann**, Network for Good
- **Kala Stroup**, American Humanics
- **Alison Wiley**, Consultant

State Association Executives

- **Peter Berns and Trudy Jacobson**, Maryland Association of Nonprofit Organizations
- **Willard "Sandy" Boyd**, Iowa Nonprofit Resource Center
- **Jennifer Campbell**, Ohio Association of Nonprofit Organizations
- **Katie Campbell**, Virginia Network of Nonprofit Organizations
- **Catherine Carabetta**, Donors Forum of Chicago
- **Michael Clark**, Nonprofit Coordinating Committee of New York
- **Danielle Clore**, Nonprofit Leadership Initiative (KY)
- **Ron Cretaro**, Connecticut Association of Nonprofits
- **Linda Czipo**, Center for Non-Profit Corporations (NJ)
- **George Elliott**, Nonprofit Resource Center of Alabama
- **John Flanagan**, Hawai'i Alliance of Nonprofit Organizations
- **Melissa Flournoy**, Louisiana Association of Nonprofit Organizations
- **Joe Geiger**, Pennsylvania Association of Nonprofit Organizations
- **Sandy Gill**, Northwest Nonprofit Resources (WA)
- **Flo Green**, California Association of Nonprofits
- **Debby Hampton**, Oklahoma Center for Nonprofits
- **Jeff Kost**, Center for Nonprofit Advancement (DC)
- **Trisha Lester and Sally Migliore**, North Carolina Center for Nonprofits
- **Mark McCrary and Jo G Prichard**, Mississippi Center for Nonprofits
- **Patrick McWhortor**, Alliance of Arizona Nonprofits
- **Marina Pavlov**, Florida Association of Nonprofit Organizations
- **Brenda Peluso**, Maine Association of Nonprofits
- **Jon Pratt**, Minnesota Council of Nonprofits
- **Brad Robinson**, Montana Nonprofit Association
- **Doug Sauer**, Council of Community Services of New York State
- **Barry Silverberg**, Texas Association of Nonprofit Organizations
- **Mark Turner**, Colorado Nonprofit Association

Summary of Educational Sessions

Advocacy Strategies 101: **Jim Hudson**, Center for Lobbying in the Public Interest; **Liz Towne**, Alliance for Justice; and **Brian Magee**, Montana Nonprofit Association, spoke with attendees about effective advocacy strategies and nonprofit lobbying regulations. Topics included creative methods for communicating and building relationships with lawmakers, and how to implement an effective legislative advocacy campaign and “call to action”. Participants also discussed the need for patience and persistence when engaging in the policy process.

Civil Society and Technology: The Future of Philanthropy, Volunteerism, and Advocacy: **Gregory Baldwin**, VolunteerMatch; **Sheeraz Haji**, GetActive; **Margot Pritzker**, WomenOnCall.org; **Bill Strathmann**, Network for Good; and **Billy Bicket**, TechSoup, discussed the role that technology will play in future philanthropic endeavors. The conversation included methods of engaging in online fundraising, recruiting volunteers, increasing membership, pooling resources, disseminating information, grassroots mobilization, and other technology trends that relate directly to the nonprofit sector.

Coalition Building: **Cecilia Munoz**, National Council of La Raza; **Jason Sabo**, United Ways of Texas; and **Jon Pratt**, Minnesota Council of Nonprofits talked about the best methods of building coalitions. Panelists recommended ways of making friends out of enemies, diversifying, and building on past relationships. Recommendations included being focused in articulating specific goals and strategies of the coalitions, being holistic in approaching the needs of potential coalition members, and ensuring transparency and follow through in all coalition work.

Elevating the Nonprofit Sector: An Opportunity to Speak with One Voice: **Michael Clark**, Nonprofit Coordinating Committee of New York; **Dave Clayton**, Nonprofit Social Issues Practice, Harris Interactive; **Frank Sietzen**, *Washington Examiner*; and **Larry Checco**, Checco Communications presented methods for creating a brand for the nonprofit sector at large and messaging it to the media. The conversation was far-reaching and ranged from definitions of the nonprofit sector and the importance of creating a sector-wide brand to tactical recommendations on how to build strong relationships with media.

Communicating with the Public in an Age of Skepticism: **Michael Lipsky**, DEMOS and Georgetown Public Policy Institute; **Jean Johnson**, Public Agenda; and **Alan Abramson**, Aspen Institute, discussed public opinion of the nonprofit sector and government’s role in society. The session explored negative public opinion of nonprofits and the need to “re-imagine” government’s role in society. This session articulated the need for nonprofits to extend their current reach within communities, show discipline in communications, and be persistence in reaching collective goals in order to succeed in shifting the current discourse.

Passing the Torch: Leadership Transition and Preparation for the Next Generation of Nonprofit Leaders: **Patrick Corvington**, Annie E. Casey Foundation; **Irv Katz**, National Human Services Assembly, **Phyllis Wallace**, Nonprofit Partnerships and Campus Expansion, American Humanics; and **Michael Weekes**, Massachusetts Council of Human Service Providers, focused on the urgency of recruiting and retaining future nonprofit leaders. Given that 640,000 new nonprofit leaders will be needed in the next decade, this session addressed the critical roles of young and mid-career leaders, the importance of organizational culture in supporting staff development, and the need to revamp recruiting strategies.

Resource Development: Rethinking Nonprofit Sustainability: **Richard Brewster**, National Center on Nonprofit Enterprise; **Jeannine Jacokes**, Partners for the Common Good and Social Enterprise Alliance; **Liz Nicholson**, Nonprofit Finance Fund; and **Benjamin Shute, Jr.**, Rockefeller Brothers Fund, addressed innovative trends in nonprofit resource development and finance. Panelists debunked the myth that “nonprofits cannot make money,” underscored the need for permanent sources of unrestricted funds, explored the use of nonprofit lines of credit, and explored strategies for mission-focused social enterprise.

Targeting Your Advocacy: How (and Who) to Engage at the Local, State, and Federal Level: **Heather Arnet**, Women and Girls Foundation of Southwest Pennsylvania; **Henry Bogdan**, Maryland Association of Nonprofit Organizations; **Mauricio Vivero**, 501(c) Strategies; and **Melissa Flournoy**, Louisiana Association of Nonprofit Organizations, provided insight on effective advocacy. Panelists addressed the critical need for nonprofits to be confident they can change the status quo and to frame their issues carefully. In addition, the session underscored the need for nonprofits to fully understand the policy process due to the fact that identifying and targeting the appropriate decision maker is often more complex than it appears.

Working Session Facilitators

- **Marcia Avner**, Public Policy Director,
Minnesota Council of Nonprofits
- **Elizabeth Boris**, Director,
Center on Nonprofits and Philanthropy, Urban Institute
- **Diana Bucco**, Senior Program Officer,
The Forbes Funds
- **Katie Burnham Laverty**, President and CEO,
Society for Nonprofit Organizations
- **Linda Czipo**, Executive Director,
Center for Non-Profit Corporations
- **Larry Decker**, Director, Government Relations,
American Red Cross
- **Tim Delaney**, President and Founder,
Center for Leadership, Ethics & Public Service
- **Melissa Flournoy**, President and CEO,
Louisiana Association of Nonprofit Organizations
- **Flo Green**, Executive Director,
California Association of Nonprofits
- **Hedy Helsell**, Consultant
- **Wilson Jones**, Chairman,
Alliance of Nonprofits for Insurance, Risk Retention Group
- **Don Kramer**, Editor and Publisher,
Don Kramer's Nonprofit Issues
- **Isabel Lopez**, Principal,
Lopez Leadership Services
- **Alison Wiley**, Consultant

Summary of Working Sessions: Root Causes, Long-Term Implications, and Strategies to Address the 3 Top Priorities

Advocacy & Grassroots Community Activities

CONTEXT

Root causes of why current advocacy and grassroots efforts are not as prevalent or successful as they could be include:

- Nonprofits are too nice
- Elected officials misunderstand the sector
- A common lack of understanding of nonprofit advocacy rights, including misinformation from legal professionals
- Nonprofits don't see advocacy as part of their mission
- Risk-adverse boards of directors
- Competition between organizations
- Nonprofits' inability to make advocacy a priority given competing (and more immediate) demands
- Nonprofits cannot afford to do this alone
- Intimidation
- People don't believe they have the power to change anything
- Lack of inspirational leaders
- Democracy is hard: grassroots work is difficult and expensive; long term benefits are not easily recognized
- Lack of mobilization of volunteers and others
- Lack of education and capacity to do advocacy well
- The lack of a bottom-up strategy: start with the local and state levels, not with the federal level
- Vision beyond one organization is required
- Apathy
- Fear of losing government contracts or other funding
- Lack of resources for this purpose
- Lack of understanding what our constituents really need
- Lack of understanding the importance of this work – it is not a lack of resources it the prioritization of those resources
- The culture of the nonprofit sector is to blame: it needs to be OK to blow our own horn
- Nonprofits believe this is a zero sum game; we need to shift our thinking and believe we can grow the pie

Long-term implications of successfully addressing advocacy and grassroots community activities include:

- Nonprofits will have a larger impact and be a powerful force to change public policy for the better
- Stronger relationships between nonprofits and our constituents
- Nonprofits will be on equal footing with government and business
- The face of nonprofits will change: organizations will have different skills sets, different types of supporters, etc.
- Nonprofits will be at the table when decisions are made
- Nonprofits will become a true partner with government
- The nonprofit sector will adopt a different way of thinking
- Nonprofits will have better visibility
- Communities will be stronger because nonprofits connect people to each other and help them to overcome a sense of powerlessness
- Increased civic participation will create social change

- Nonprofits have access to increased funding
- Better solutions to current problems
- Systemic change, rather than temporary band-aid solutions
- Nonprofits will no longer be needed because long-term issues are solved
- Government and the public will have realistic expectations of nonprofits' capacities and needs
- Root causes will be addressed
- Underrepresented organizations will have a voice

STRATEGIES

Training and Education within the Nonprofit Sector

- Train and support nonprofit employees in developing advocacy skills and grassroots constituencies
- Increase trainings on advocacy and lobbying, including coordinating new statewide trainings, working with universities and other educational institutions to incorporate advocacy training into curriculum, and meeting with management services organizations to integrate policy into ongoing trainings
- Educate nonprofit board, staff, volunteers, and constituents on politics and the process of policy change
- Educate board of directors about the importance of advocacy
- Create mentoring program to help new organizations engage in advocacy
- Encourage seasoned professionals to enter in peer-to-peer advocacy mentorship
- Educate funders and individual philanthropists about the need for nonprofits to increase their engagement in advocacy
- Educate nonprofits about ways to engage in nonpartisan voter engagement
- Change culture and identity of nonprofits to not only meet the immediate needs but to prevent those needs in the future
- Encourage individual organizations to devote resources to advocacy efforts

Building Relationships with Government and Business

- Meet with local, state, and federal decision makers and representatives
- Ensure nonprofit representation from every state at national conferences for Governors, Attorneys General, Mayors, etc.
- Find new allies in elected officials from both parties and new legislative leaders to carry our torch
- Hold business and government accountable for their responsibilities
- Partner with businesses; ask them to align with nonprofits on advocacy issues

Convening

- Bring together statewide advocacy leaders to educate and inform on sector issues
- Host a state Legislative/Advocacy Day
- Develop permanent alliances and coalitions
- Create a nonprofit cabinet in every state; create a formal government-nonprofit liaison office
- Regionalize advocacy and grassroots efforts to increase collaboration and capacity, but work on a statewide level (similar to the Chamber of Commerce model)
- Hold additional Town Hall meetings, with more diverse representation
- Create task force on impact and importance of nonprofit sector; reframe the issues nonprofits address to show their cumulative benefit on communities
- Be more inclusive
- Convene a working group to examine ways to depolarize issues
- Establish cross-community teams to pursue community issues through civic conversations

Collective Planning and Action

- Create a proactive state/national policy platform for the sector
- Look for a common rallying point for a collective advocacy campaign
- Organize nonprofit constituents
- Create a campaign to inform and get people involved – the “10” easy ways to get involved

Communication

- Develop newsletter and/or website for charities across the state that introduces the Nonprofit Congress and provides FAQ's about lobbying

Nonprofit Organizational Effectiveness

Focusing on Accountability/Best Practices and Leadership

CONTEXT

Root causes of why current nonprofit organizational effectiveness is not as prevalent or successful as it could be include:

- The current system is focused on not spending resources on infrastructure, administration, and overhead
- Fragmentation; silo mentality
- Unrealistic expectations on the part of the public and government
- Overwhelming social problems and lack of resources; being overextended
- Lack of strategic planning
- Nonprofits are so focused on a dream that we miss out on the nuts and bolts of running an organization
- Lack of effective boards
- Lack of business skill sets and mindset
- Founders syndrome, the lack of ability to change
- Lack of common measurements
- Lack of focus
- Lack of effective mentorship and leadership development
- Negative media stories
- Leadership deficit
- It is too easy to become a 501(c)(3)
- Poor training
- Short-term thinking
- The only way to do this right is to go to scale; individual groups can't do this
- Lack of effective human resources strategies
- Misconceptions about how to best measure the effectiveness of nonprofits
- Effectiveness is not a priority for organizations, funders, or volunteers
- Lack of support for infrastructure
- Chronic under-funding, particularly of administrative and core operating support
- Lack of infrastructure to support nonprofit capacity building
- Organizational structures are not conducive to efficiency and effectiveness
- Lack of education and training
- Too many variable standards
- Competition

Long-term implications of successfully addressing nonprofit organizational effectiveness include:

- Excellent organizations both in terms of accountability and ability to meet community needs
- Longevity, stability, and credibility
- Nonprofits will be better able to strategically focus on solutions
- Return on investment will be assured for donors
- Increased resources for nonprofits
- Nonprofits will have the public's trust
- A sustainable support system for communities
- Effective social change models
- Nonprofits will be better able to adjust to paradigm shifts
- More effective use of resources
- A better and more sustainable balance between mission, people, services, and capacity
- Respect
- Efficiency
- A stronger nonprofit sector

- Increased self regulation; decreased threats from government to overregulation the nonprofit sector
- Greater impact
- Innovative planning
- Well-trained and well-educated staff
- Increased capacity
- Nonprofits will be inspired by ethics and integrity
- Increase in public and private support
- Increased leverage with the public, government, and business
- The ability to counter negative press on the bad apples
- The ability to work on a larger scale

STRATEGIES

Mindset

- Understand difference between management and leadership and address both
- Think and plan strategically, not reactively
- Fundamentally change our approach to funding
- Define leadership more broadly – we will need to recruit a diverse workforce – age, ethnicity, gender, etc
- Embrace new leadership models that reflect coming of age in a collaborative environment
- Create vehicles for culture conversation/roundtable
- Promote a mind-set that encourages respect for the significant work we do, our high level of skill, and commitment; acknowledge our capital

Education, Research, and Materials Development

- Identify existing resources; highlight unique services; don't reinvent the wheel
- Develop/promote best practices material and programs
- Train nonprofit board members; disseminate information on board priorities; expand board leadership programs to all socio-economic classes and communities
- Develop competency-building programs
- Develop nonprofit sector specific leadership and management tools for individual organizational assessments
- Provide better support and education for board and staff development before they assume their positions
- Evaluate current education process and move towards standardization competencies
- Pull together best practices in leadership development
- Identify and train emerging leaders in knowledge development and skill building
- Implement a long-term strategy focused on mentoring in leadership development programs
- Include coaching as part of the executive compensation package
- Create a training institute (connected with national mentoring program) for existing leaders
- Facilitate collaboration and exposure of voices from different generations to share ideas and experience

Relationship Building and Cross-Sector Learning

- Assess business leadership development strategies and determine when they are appropriate for nonprofits
- Encourage/teach donors to support capacity building for potential/emerging sector leaders
- Create new partnerships
- Partner with other sectors to invest in leadership development
- Work with all community foundations
- Encourage funders (government, United Ways, foundations, etc) to ask for and provide incentives to use board management profile assessment and proof of board training/certificate participation

Recruiting, Retention, and Transitions

- Implement systems that plan for and ease transitions to ensure dynamic and flexible organizations
- Wage a "war for talent" using colleges/job fairs/media
- Pay staff and marketing in every grant proposal
- Recognize nonprofit leadership as a legitimate career choice; reach into the schools for promotion

- Increase the “glamour” and the respect of the sector through a national ad campaign
- Develop compensation packages that attract the best and the brightest, including salary, professional development, sabbatical, and flexibility
- Provide additional benefits to nonprofit employees, such as extra vacation, one day per month to volunteer, flex time, etc.
- Increase overall flow of people interested in board service; launch an ad campaign promoting board service
- Develop a message that resonates with the “search for meaning” generation

Other

- Develop awareness campaign for the sector regarding need and benefit of leadership education
- Makeover the image of nonprofits; change the language around the charity model
- Create statewide associations of board members
- Establish nonprofit credit care, discounts for nonprofits and free bank services
- Support the Nonprofit Capacity Building Initiative, a proposal to establish an entity for nonprofits similar to the Small Business Administration for nonprofits

Public Awareness and Support of the Nonprofit Sector

CONTEXT

Root causes of why current public awareness and support of the sector is not as prevalent or positive as it could be include:

- Denial or lack of understanding of the importance of communications and PR
- Diversity, the lack of unity
- Apathy
- Boards of directors do not embrace the role of community spokesperson and liaison
- Lack of clear and concise facts and statistics about the nonprofit sector
- Nonprofits are too focused on our own organizations
- Nonprofits don’t listen to the marketplace
- Lack of collaboration
- Nonprofits lack a nonprofit consciousness
- Nonprofits serve too many masters, we don’t know what we are selling or to whom we are selling
- The sector is not organized enough to do this
- The public image of the sector is driven by negative media
- “Nonprofit” is a negative term
- The public does not currently understand the role of the nonprofit sector
- The culture of nonprofits reflects low self esteem and self deprecation
- Lack of capacity and skills
- American culture is based on individualism and self-centeredness
- Lack of marketing on the part of nonprofits
- Nonprofits discuss problems rather than successes
- Lack of media savvy
- Nonprofits have an apologetic mindset
- Lack of a clear, shared message
- Lack of investment in communication and PR
- Lack a nonprofit sector leaders
- Media paints nonprofits as a cute kid
- Media does not want to understand the systemic issues behind current problems
- Lack of a definition of the nonprofit sector: who are we?
- Nonprofits don’t take advantage of publicity

Long-term implications of successfully addressing public awareness and support of the sector include:

- Increased public understanding and support for nonprofits
- Nonprofits will be better able to accomplish their missions, organizations can not do this without the public
- The sector will be widely recognized as a viable social and economic force
- The public will understand that nonprofits are a good investment
- Power
- Individuals will increase their involvement in all levels within an organizations
- More young professionals will enter the nonprofit sector; nonprofits will fill the generational gap in leadership
- Respect
- Viable careers with good salaries and benefits
- More unity and less fragmentation within the nonprofit sector itself
- Nonprofits will redefine ourselves in a positive light
- Nonprofits will endure a greater risk of regulation from government and competition from business
- The relevancy and perceived importance of nonprofits will grow
- Nonprofits will be able to control our own reputation
- The nonprofit sector will be able to sustain itself
- The public will understand that nonprofits do much more than serve the poor
- Nonprofits will be better able to match audiences and services, this will decrease the disconnect between organizations and those in need
- Nonprofits will be better able to achieve individuals missions and collective goals
- This country will develop a stronger culture of volunteerism and social responsibility
- The public will be able to differentiate between large and small nonprofits

STRATEGIES

Events

- Hold a statewide Nonprofit Day
- Hold a forum or town hall debate for federal Presidential candidates in each state, especially key primary states
- Hold donor/funder conferences similar to public company investor conferences where nonprofits come together to present their organization to funders, media, and others
- Establish a day where nonprofits all shut down
- Establish a symbolic nonprofit week or nonprofit day

Public Education and Public Relations

- Develop a public relations campaign – create a national steering committee to work on this; create a professional campaign (National PR firm/Ad Council); multilayered campaign to reach various target markets (i.e., youth seniors, corporate sector, politicians); use latest technology and multimedia approach
- Launch a PR and ad campaign specifically to increase charitable giving; to document the benefits of the sector
- Use technology such as blogs and webcasts to promote nonprofits, state associations, and Nonprofit Congress
- Change the name “nonprofit,” perhaps to PROS (Public Response Organizations)
- Establish a nonprofit tagline
- Utilize PSA’s to share the effectiveness of nonprofits (or what the world be like without nonprofits)
- Influence TV/Hollywood to incorporate nonprofits into popular culture storylines
- Leverage public speaking opportunities at events outside of the nonprofit sector
- Educate and partner with youth to influence the next generation; focus on students; target messages to young adults
- Establish spokespeople for the nonprofit sector
- Recruit a celebrity spokesperson
- Establish a mascot
- Rebrand the nonprofit sector: each nonprofit should contribute \$5 to hire ad/branding firm, come up with one way to get the word out, and put a “member of nonprofit sector” on their website/ads/spots/literature

- Ensure that secondary schools and colleges educate on leadership in the nonprofit sector; utilize guidance counselors and curriculum specialists
- Develop a service similar to 211 as a national reference resource
- Develop a national campaign that promotes the idea that everyone belongs to the community of common social good. Reinforce concept on personal and local levels
- Develop a quarterly newsletter for the public

Communication and Collaboration within the Nonprofit Sector

- Develop common asset-based language
- Show strong unity and collaboration within the sector
- Develop a unified message based on Guiding Principles of Nonprofit Congress; develop a common message from nonprofits to government officials and the public
- Create a strategy to inform nonprofits and the public about the Nonprofit Congress
- Decrease fragmentation through increased networking
- Promote the greater good of the sector beyond the individual organization
- Develop a grassroots campaign – local nonprofits use materials developed for national campaign on local area and develop local strategies
- Develop a campaign to promote greater understanding among nonprofits about the sector as a whole and each other; use annual meetings of state nonprofit associations as a vehicle; foster the development of regional and local nonprofit associations – formal and informal
- Develop/strengthen state associations in every state
- Encourage the Nonprofit Congress to open itself to anyone who wants to be involved as a one-stop resource for information and involvement in the sector
- Communicate key messages of the Nonprofit Congress and State Action Plans to the nonprofit community

Media Relations

- Increase training on media relations
- Increase involvement and strategic use of the media
- Secure an ongoing nonprofit section in major daily newspapers
- Promote stories of success, more than just feel-good stories
- Increase proactive/positive communications to local/state outlets by coming up with our own ways to get the word out
- Buy a newspaper column
- Highlight the local hero aspect of nonprofit work
- Meet with editorial boards to explain nonprofit sector

Relationship Building and Cross-Sector Partnerships

- Educate state, federal, and local elected officials on what the sector contributes to the state, including economic and social benefits
- Hold joint meetings with counties and other local governments
- Increase grassroots communication with local government
- Partner with government to validate the essential nature of nonprofits
- Network with funders of all scope and size to support and endorse rebranding our image

Research and Planning

- Conduct a survey of internal and external market (environmental scan)
- Conduct a brand audit and create a nationwide marketing/branding plan
- Establish the true cost of services to promote the understanding of the importance of nonprofits, and our subsidy of service