

# **Roger Williams University EBCH Final Report 2013**



# **EAST BAY COALITION FOR THE HOMELESS**

# The Roger Williams University Community Partnerships Center

The Roger Williams University (RWU) Community Partnerships Center (CPC) provides project-based assistance to non-profit organizations, government agencies and low- and moderate-income communities in Rhode Island and southeastern Massachusetts. Our mission is to undertake and complete projects that will benefit the local community while providing RWU students with experience in real-world projects that deepen their academic experiences.

CPC projects draw upon the skills and experience of students and faculty from RWU programs in areas such as:

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- Historic Preservation
- Law
- Justice Studies
- Business
- Education
- Engineering and Construction Management
- Environmental Science and Sustainability
- Community Development
- Visual Arts and Digital Media
- Marketing and Communications
- Graphic Design
- Political Science
- Psychology
- History
- American Studies
- Finance
- Public Administration
- Public Relations
- Writing Studies
- Sustainable Studies

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# Executive Summary

The East Bay Coalition for the Homeless is a program of the East Bay Community Action Program that provides housing and support services to homeless families. While the EBCH provides valuable services to the community, its work is not well known or recognized. Thus, while the need for assistance for the homeless has increased, donations have not kept pace.

The EBCH requested assistance from Roger Williams University through the Community Partnerships Center. The EBCH requested support in the form of a branding study and a marketing strategy to attract new donors and to increase funding.



The project was undertaken by three classes: Marketing Research in the fall of 2012 and a Special Topics Marketing class and a Web Development Center class in the spring of 2013. These last two classes began their work individually and then formed cross-disciplinary groups to complete the work.

Although the EBCH does have a website and is using social media, neither avenue is being used to its fullest potential. What follows are suggestions to enhance these efforts to help achieve the dual goals of increased awareness and increased funding. More specifically, the report details plans for communicating the EBCH's story via specific marketing objectives, strategies and tactics which include a new logo and tag line and a new website.

The report suggests strategies that can be incorporated into the current work flow and builds upon the current work of the EBCH. The report also presents ways in which to create a more efficient platform for completing marketing tasks, creating opportunities for awareness and knowledge of the EBCH, and increasing consideration of the EBCH as a potential donation focus.

The EBCH is viewed as a hard-working small organization. Instead, it needs to be viewed as a small organization making an important impact on individual families and on the East Bay Community. Accordingly, we suggest repositioning the organization to highlight the ways in which it is different from other Rhode Island organizations that address homelessness so that it will occupy a unique place in people's minds.

# Project Goals & Objectives

## Client Request

Develop a market attraction/branding study for the EBCH, resulting in a strategic marketing plan to increase funding and awareness. This strategy will increase visibility in the community and ultimately increase financial support for the organization.

## Additional Goals

- Identify the current EBCH image
- Identify alternative images
- Identify how best to communicate the image
- Assess current fundraising efforts

## Primary Marketing Problem

The EBCH is not well known among potential donors and volunteers. EBCH needs to increase its brand awareness in the East Bay and among high profile donors throughout Rhode Island.

# Research

Research Objectives	<p>Identify the organization's current image</p> <p>Identify alternative messages to convey the EBCH's story</p> <p>Identify how best to communicate the new image</p> <p>Assess current fundraising efforts</p>
Secondary Research	<p>Surveys conducted by other charitable organizations</p> <p>Articles about charitable giving attitudes</p> <p>Articles about charitable giving motivations</p>
Primary Research	<p>Baseline survey of EBCH and EBCAP Board Members (Fall 2012)</p> <p>Survey of EBCAP mailing list: Current Donors, Former Donors and Non-donors (Spring 2013)</p>

Fall 2012 Baseline Board Survey

See Appendices A and B for Research Report (including survey questions) and Presentation Slides

## Welcome to the Roger Williams University EBCH Survey!



### About This Survey

You are invited to participate in a survey to evaluate the EBCH's role in the East Bay community. We are asking for your help because you are or have been an EBCH or EBCAP Board member.

Your responses are important because they will help guide future EBCH marketing strategies that will improve its image in the East Bay community and lead to increased contributions.

Your participation will involve completing this short survey which should take about 10 minutes. You may choose not to answer some or all of the questions. You may leave the survey at any time before completing it. Your name will not appear on your completed survey and no identifying information is being collected.

Spring Survey

See Appendices C and D for Presentation Slides and Survey Questions



## Welcome to the EBCAP/EBCH Survey!



### About This Survey

You are invited to participate in a survey about the EBCAP's housing program, the East Bay Coalition for the Homeless (EBCH). We are asking for your thoughts and perspectives because you currently receive the EBCAP newsletter or have been associated with the EBCAP or the EBCH in some way.

The EBCH is working with students at Roger Williams University to assess the organization's image. Your input will help us develop future programs to increase awareness of the EBCH's programs as well as expand the EBCH's outreach in the community.

Your responses are important to a successful outcome.

## Key Research Findings

### **Awareness/Image**

1. Other than “insiders,” the EBCH is not well known
2. EBCH image is not clearly articulated

### **Strengths to Build Upon**

1. Dedicated staff and board; committed to the mission/cause
2. Well thought of by current and former donors
3. Strong belief that donations to the EBCH are put to good use

### **New Messaging**

1. Highlight EBCH’s services that help families become independent
2. Primary means of learning about charities is through news stories, direct contact and through family & friends
3. Primary reasons for donating to a charitable organization are belief in the cause and belief that donations are well-spent

### **Fundraising**

1. Board members need help asking for donations
2. Non-donors express a willingness to make a donation
3. Former donors stopped EBCH contributions because of their involvement in other organizations

Fall presentation of research results to the EBCH Board



# Situation Analysis

## Organizational Analysis

From the very beginning, the East Bay Coalition for the Homeless has depended on the local East Bay community to support it in its efforts. The program was started 1989 when community leaders and church groups joined together to devise a strategy to meet the needs of the homeless.

Currently, the EBCH is a program of the East Bay Community Action Program. The organization owns and operates 18 apartments for homeless families. Consistent with the “hand up, not a hand out” idea, the EBCH’s programs are focused on providing eligible families safe, affordable housing as well as support and services to help them become financially stable so that the families can manage their own housing needs for the long term.

EBCH’s annual operating budget is \$500,000, including \$130,000 in cash assistance that goes directly to households to prevent homelessness. The major source of funding for its housing programs are Federal Funds from HUD at \$58,000, State funds, private grants and fundraising activities. Funding for the majority of services has remained level since the early 1990s. More recently, however, the EBCH has lost \$90,000 in donations and funding because of the current economic downturn. The EBCH would like to recapture at least \$50,000 of that.

These economic realities mean that the organization does not have the budget to dedicate to marketing and communications as some competing organizations do. Nevertheless, the EBCH has a small but dedicated staff who exhibit a real passion and dedication for their work and the organization offers a unique set of services.

## Current Marketing Efforts

The East Bay Coalition for the Homeless currently has its own website which provides information on upcoming events, how to volunteer, services offered, and who the board members are. The EBCH also has also expanded its presence on several other sites including Shelterlistings.org, WhyHunger.org and Rhode Island United Way 2-1-1. Currently, marketing efforts focus primarily on what the organization does and the services it offers along with fundraising efforts through events.

## Competitive Analysis

While it may seem strange to address “competition” for a not-for-profit organization, the reality is that there is considerable competition in two areas.

First, competition exists in terms of “share of the mind.” A number of organizations in Rhode Island address homelessness and provide differing levels of services. Thus, when a prospective donor thinks about “an organization that helps the homeless,” any number of these organizations may come to mind.

Second, the non-governmental organizations compete for a finite pool of donations, especially in a small state such as Rhode Island. Not too surprisingly, the better funded organizations have a higher profile and are better known, as illustrated by the survey results presented here.

The perceptual maps that follow summarize the EBCH’s position relative to other organizations that also address homelessness based on different sets of criteria. What these maps illustrate is that in some aspects, the EBCH is in the “middle of the pack” and does not stand out; in other areas it is distinctive – sometimes in a good way and sometimes in a less desirable manner. The end result of these analyses is a better understanding of what needs to be done to improve and enhance the EBCH’s position relative to other homeless-focused organizations.

### How familiar are you with these organizations?

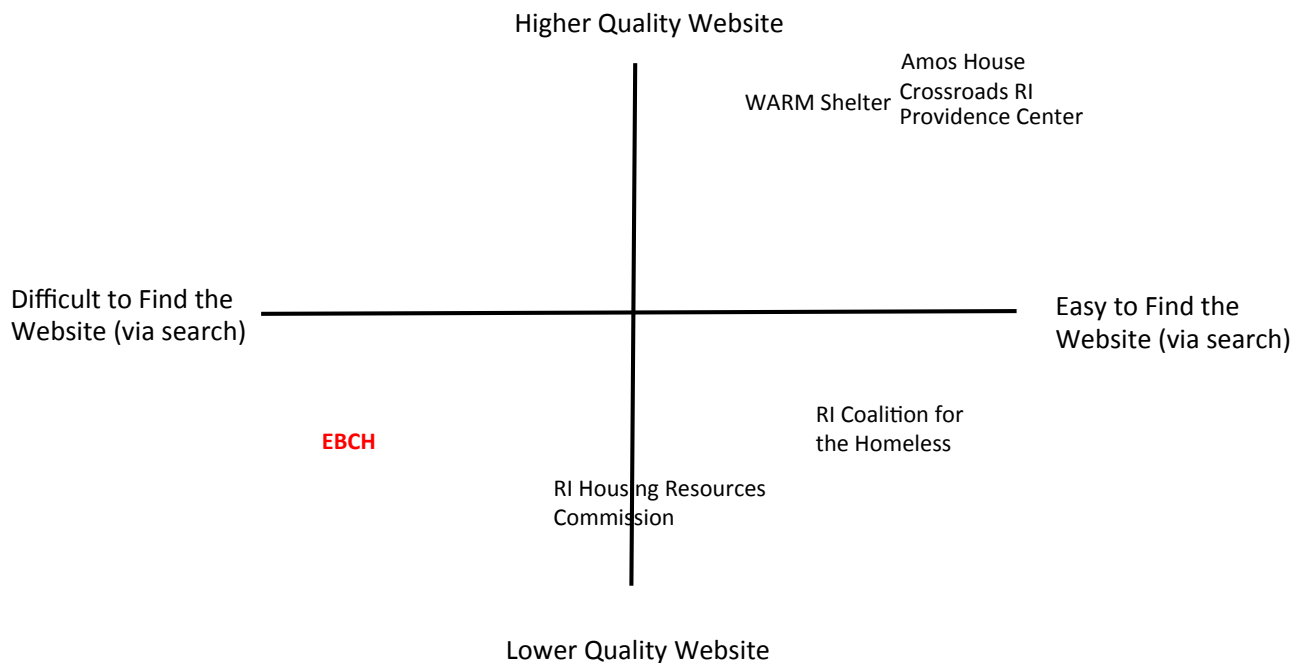
Each respondent saw a set of six organizations: Crossroads RI, EBCH and four others selected randomly from among the rest (From the Spring 2013 Survey of the EBCAP mailing list).

	I Know Something About This Organization	# Responses
Crossroads RI	93%	74
Amos House	74%	35
RI Housing Resources Commission	74%	29
Rhode Island Coalition for the Homeless	73%	26
EBCH	65%	74
Providence Center	56%	25
Advent House	55%	31
Statewide Housing Action Coalition	43%	21
Nickerson House	33%	30
Housing Networks for RI	24%	34
W.A.R.M. Shelter	24%	29
People to End Homelessness	17%	36



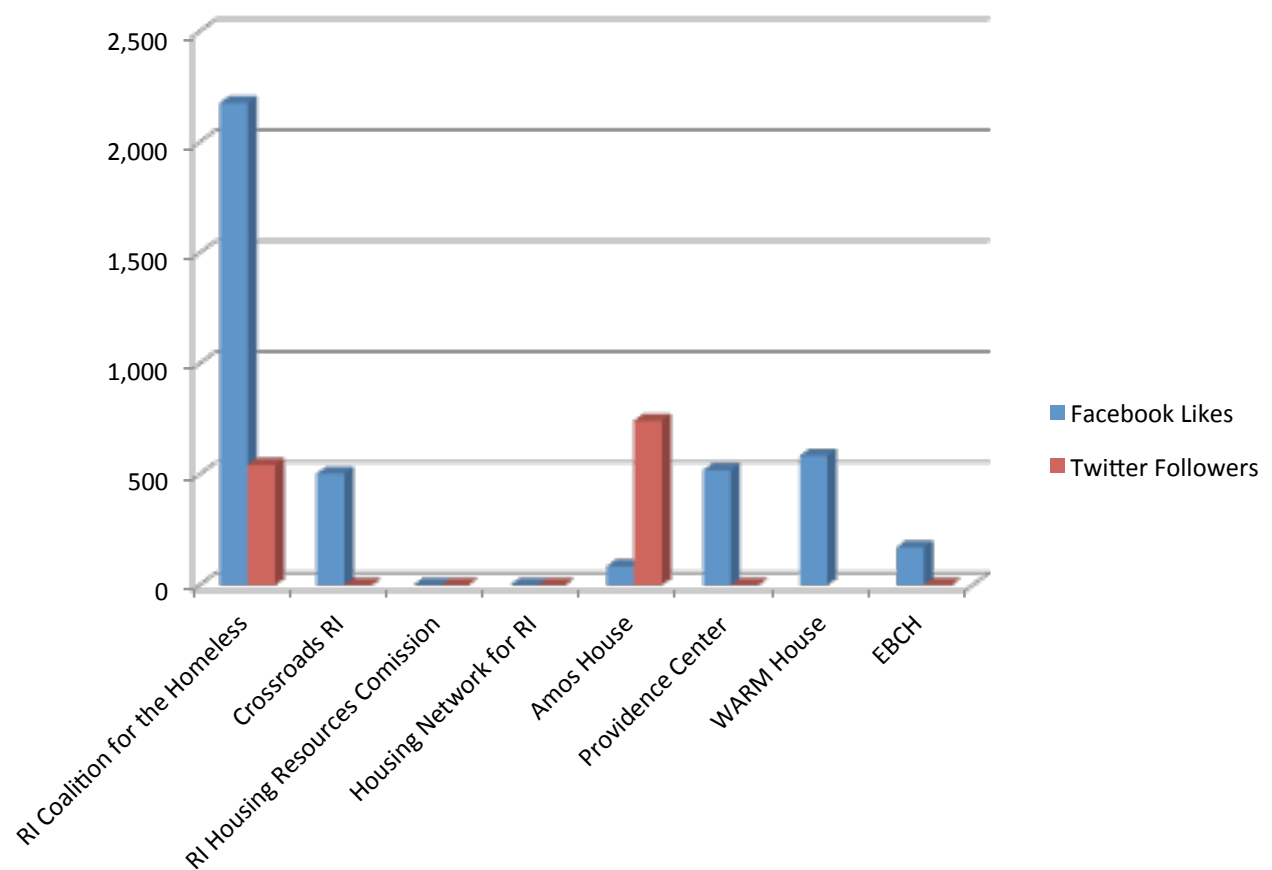
## Competitive Analysis: Internet Access to Organizational Information

Four of the main competitors are well positioned on the basis of website quality and ease of access via a web search. The RI Coalition for the Homeless has a poor website but is still easy to find by just typing the name into a search engine. The RI Housing Resources Commission has a poor website which is hard to find because it is under the Community section on the Rhode Island's government page. Something similar happens to EBCH, its design compared to the competition is poor and it is also difficult to find the website since it is under the East Bay Community Action Program's site.

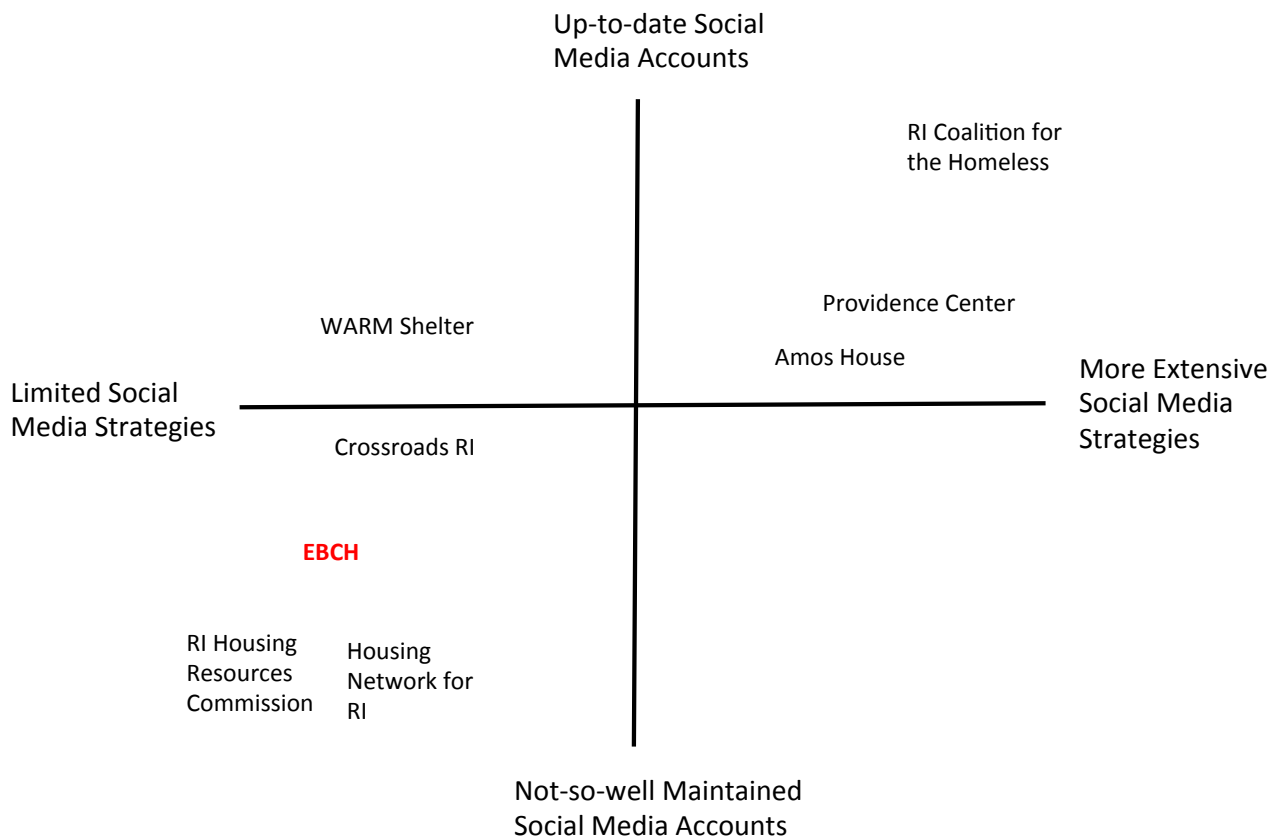


## Competitive Analysis: Social Media Usage

Only one organization seems to be Web 2.0–savvy. The rest display various degrees of social media usage as reflected in the chart below. Data for the chart were collected from each organization’s official Facebook and Twitter accounts. Data were then used to position the EBCH and its competitors in terms of social media usage, as seen in the map on the next page. The RI Coalition for the Homeless maintains the strongest social media presence and is the most up-to-date. The website links to its Facebook and Twitter accounts; press releases also are archived on the website. The Providence Center also links its website to its Facebook and Twitter accounts as well as to its LinkedIn connection. Amos House only has a Facebook and Twitter account, but they both are up-to-date. The other organizations have very limited social media resources that are not up-to-date.

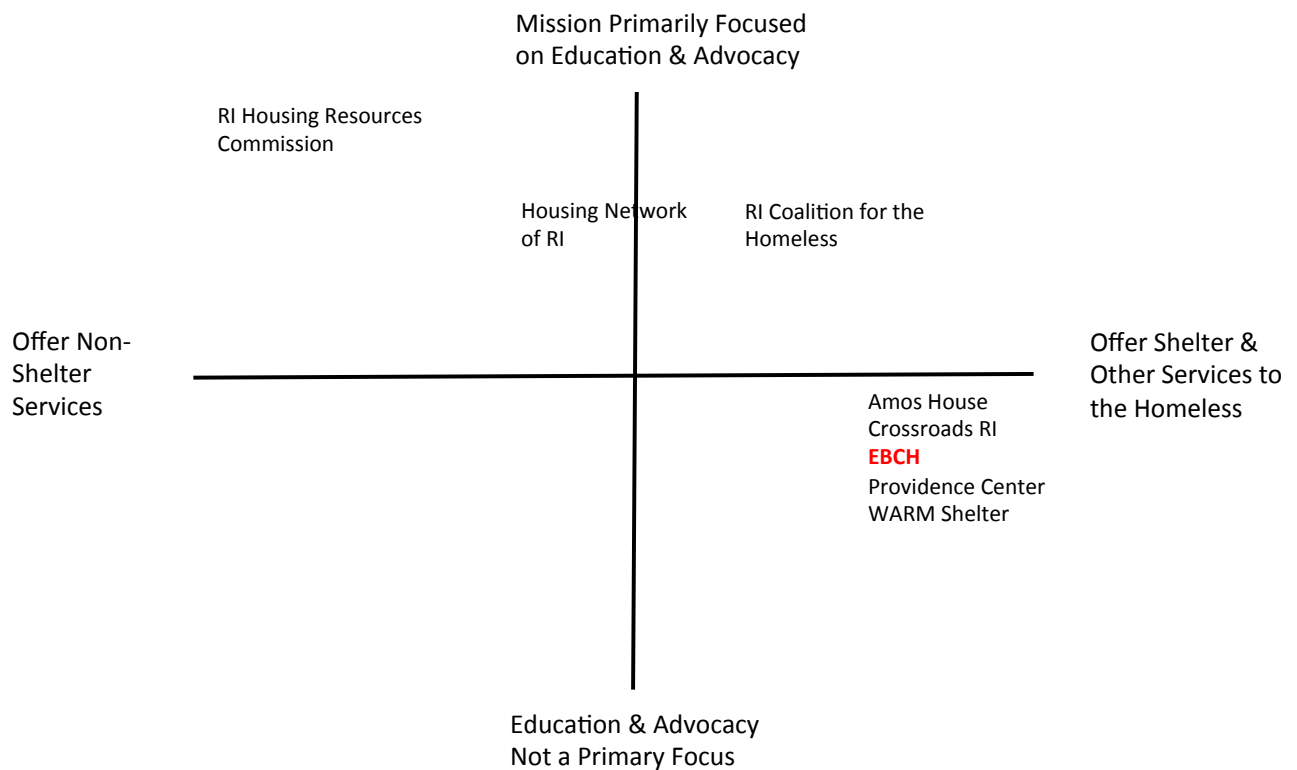


## Competitive Analysis: Social Media Usage



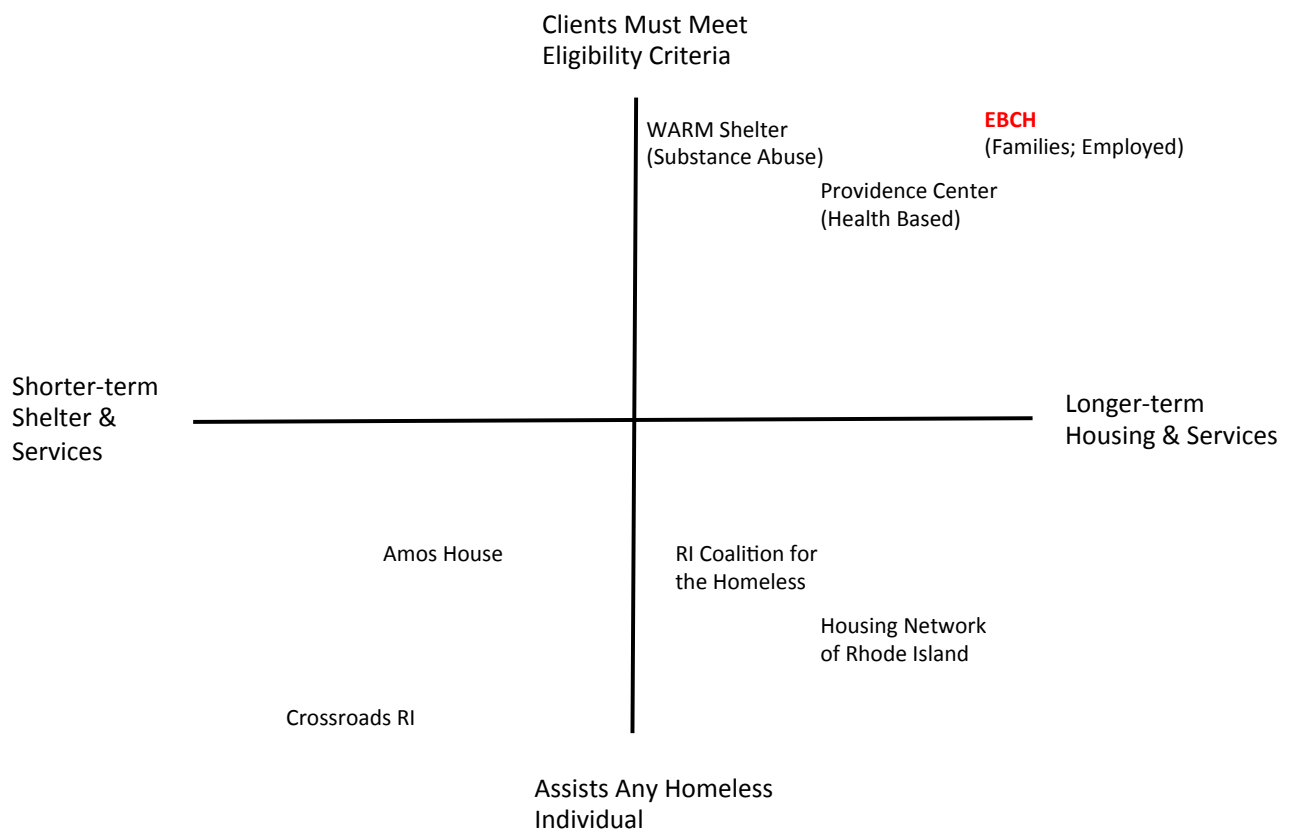
## Competitive Analysis: Public Perception of Services Provided

When considering the public perceptions of the different organizations (offering services to the homeless or being primarily an educational and advocacy organization), the EBCH is positioned along with several others. Thus it does not stand out in potential donors' minds as having its own niche.



## Competitive Analysis: Differential Services Provided

When considering the types of services offered, however, the EBCH does occupy a unique position relative to other organizations serving the homeless in Rhode Island.



## Target Audiences

The EBCH needs to reach two target audiences:

1. The general public. To raise awareness of its activities and services and its value to the East Bay community.
2. Donors. This target audience is smaller. Research did identify characteristics of current donors. To the extent that potential donors will mirror that profile, here's what we learned.



**Current Donors** tend to be well-educated individuals, ages 55-to-74, with incomes of \$75,000 and up.

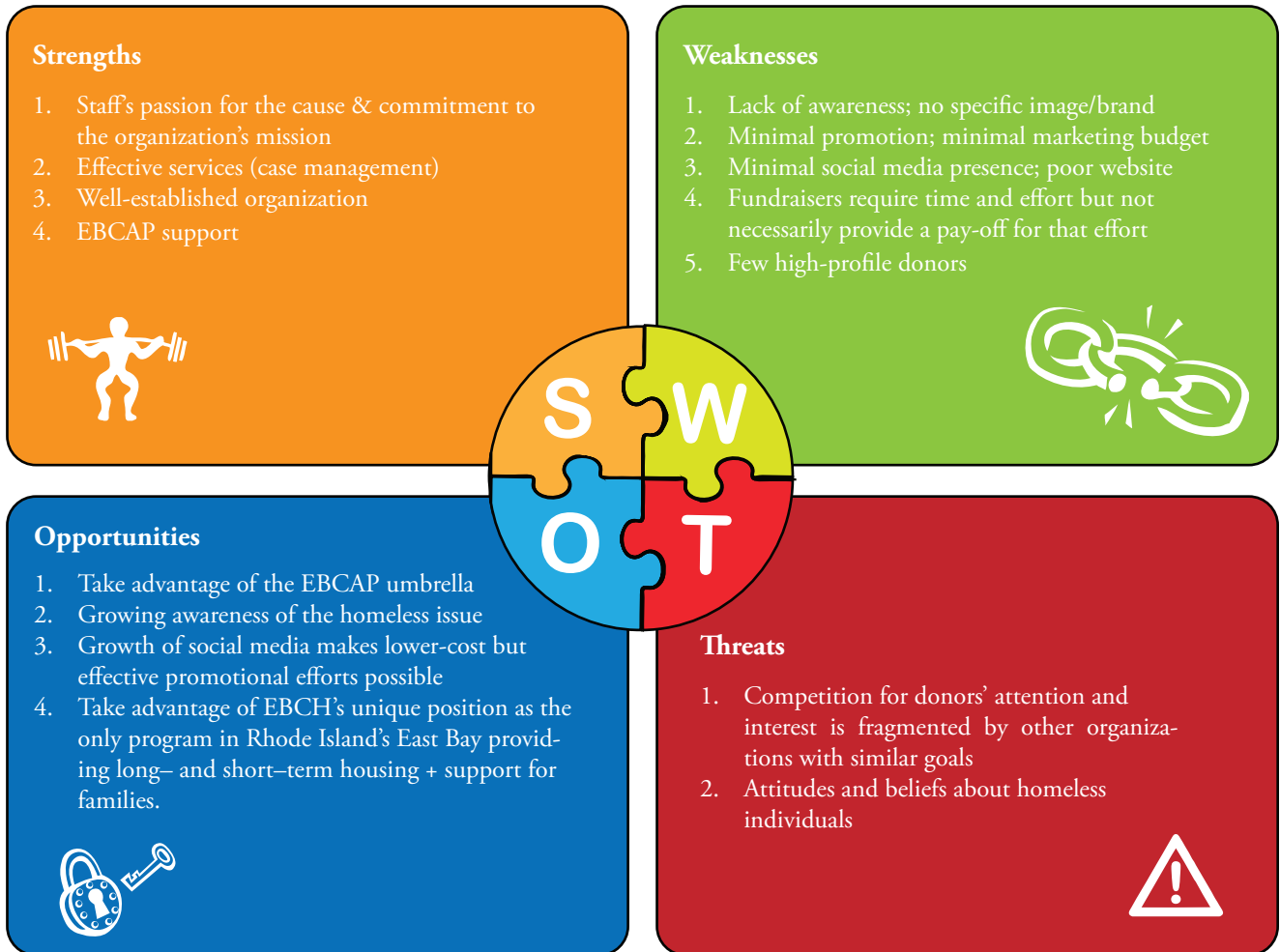
**Potential Donors** thus may have similar characteristics. It would also make sense to target younger individuals, ages 30-to-45, with college degrees, who believe in the cause. This strategy will allow the EBCH to begin to build future major donors and tap into the energy of younger individuals.

### Recognize Benefits to Donors

A primary benefit of donating is the emotional satisfaction donors receive from helping others. Some donors may derive satisfaction from knowing that they made a contribution to a local cause, especially in a small community like the East Bay where people can see the direct results of their actions. Some donors, however, may desire even more tangible evidence of the impact of their contributions. For these donors the EBCH might offer a menu of donation opportunities.

EBCH-Owned Apartments Per Unit Costs				
	Monthly	Quarterly	Semi-annual	Annual
Heat & Hot Water	\$75	\$225	\$450	\$900
Water	\$38	\$114	\$228	\$456
Electricity	\$48	\$144	\$288	\$576
Property Taxes	\$42	\$126	\$252	\$504
Property Insurance	\$39	\$117	\$234	\$468
Maintenance & Repairs	\$27	\$81	\$162	\$324
<b>Expenses Per Unit</b>	\$269	\$807	\$1,614	\$3,228
Case Management	\$225	\$675	\$1,350	\$2,700
<b>Cost for housing &amp; support services for a family of three</b>	<b>\$494</b>	<b>\$1,482</b>	<b>\$2,964</b>	<b>\$5,928</b>

## SWOT Analysis



# Marketing Objectives & Strategies.

Marketing Objectives	Marketing Strategies
Awareness	Create a new brand identity Keep information about the EBCH in front of current and potential donors
Knowledge	Provide essential information about the EBCH and the impact of its programs so that donors will understand the value of EBCH to the community and place the EBCH in their “consideration set” as a potential organization for their donations
Consideration -> Preference	Personalize the EBCH’s work so that the stories have impact and resonate with current and potential donors. Show donors that their donations are put to good use
Action	Facilitate contact with the EBCH and facilitate donations



## Positioning Strategy

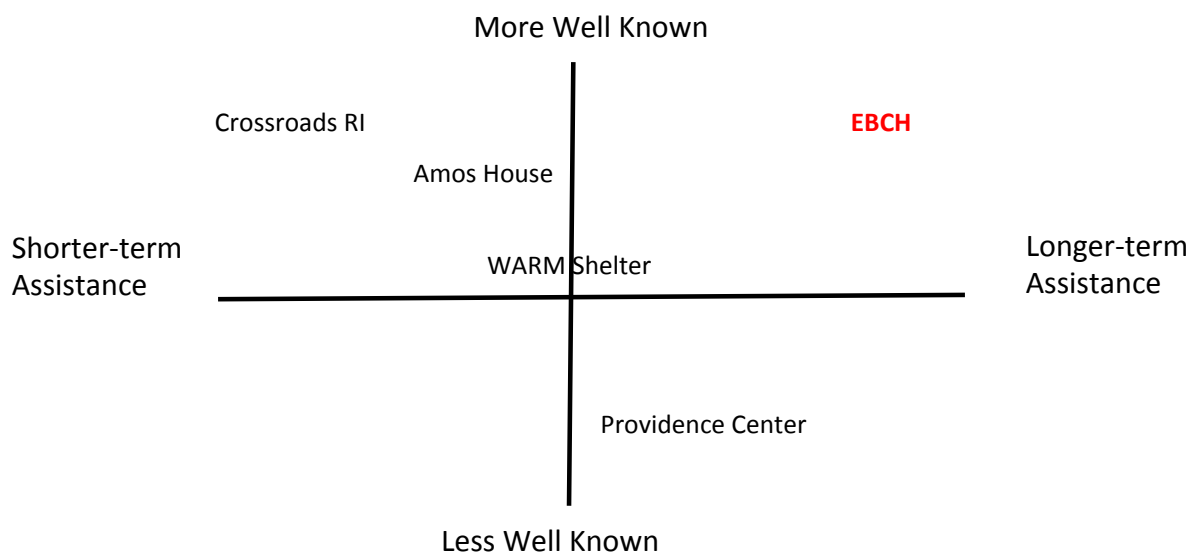
There are a number of potential positioning strategies. The two which make the most sense for the EBCH are to “position the EBCH away from others in the category” and to “position the EBCH as unique.” These strategies have the advantage of setting the EBCH apart from the other organizations that address homelessness. Occupying its own “position” in the minds of potential and current donors is not only an effective communications/marketing strategy but also a less costly one because it avoids head-to-head competition and comparisons.

Position the EBCH as a unique organization that

- offers families that are currently homeless a platform for long-term success
- provides services different from those offered by other organizations
- has an important impact on the homeless situation in the communities it serves that cannot be achieved in other ways.

## EBCH's New Positioning

The perceptual map below shows the desired position for the EBCH in the minds of current and potential donors once the marketing strategy has been implemented.



# Creative Objectives, Strategies & Tactics

Creative Objectives	Creative Strategies
<i>What</i> we want to accomplish	<i>What</i> to say and <i>How</i> to say it
Create a new brand identity	Create a new logo and tag line and design a new website
Tell the EBCH story	Tell a compelling story Emphasize that homelessness is not confined to any one group of people Address negative stereotypes of homelessness Explain how a contribution to the EBCH makes a difference Within privacy guidelines, personalize the story
Encourage participation	Explain why the EBCH is a worthy organization Invite potential donors to join the EBCH in making the difference Encourage current donors to continue the collaboration with the EBCH

## Creative Tactics

Use colors that connect with current EBCH logos and materials  
 Communicate competency and professionalism  
 Create a sense of urgency  
 Create a sense of being part of something important, of being able to make a difference  
 Use photos to communicate activity and participation and to highlight those involved

## Logo

The existing logo, while recognizable, was not unique, because of its similarity to the RICH logo, and some thought it looked “childish.”



Several options were presented for an updated logo and, after discussion and refinements, the one below was selected.



## Tag Line:

### Opening doors, one day at a time

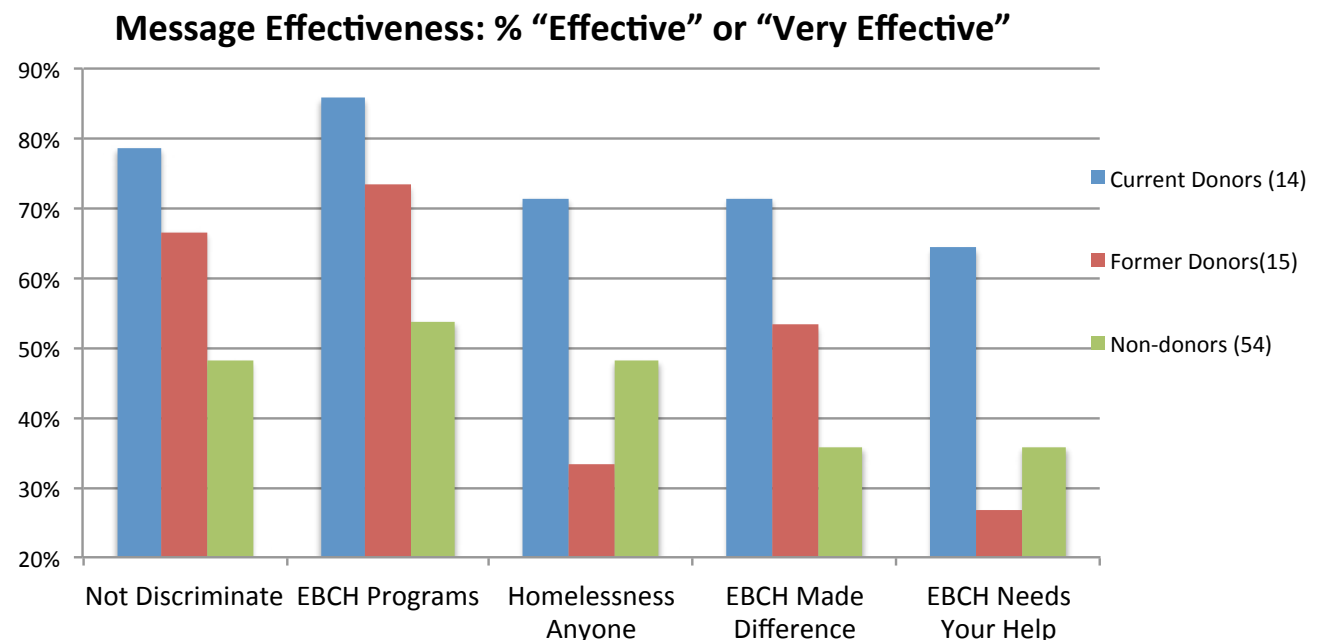
A tag line needs to convey the organization's mission and be meaningful to potential donors. Since it is "shorthand" for an organization, the tag line needs to help set the organization apart from others that provide similar services.

The search for a tag line was informed by research that presented five possible narratives for conveying the EBCH story. A review of the narratives deemed to be the most effective yielded a number of potential tag lines (see the list on the right).

In the end, the one at the top of the page was selected as best conveying the desired EBCH message.

## Alternative Tag Lines

Bridging hope with opportunity.  
Homelessness does not discriminate;  
it can happen to anyone.  
Homelessness. You never know.  
A hand-up not a hand-out.  
Because a family needs a home.



For more specific research findings about messaging, see Appendices A & C for research results and Appendices A & D for the survey questions.

## Additional Messaging

Under the “Opening doors, one day at a time” tag line, other messaging strategies may be used depending on the targeted audience. The following messages are suggested as options.

### **Welcome Home**

Time and again, our hearts are warmed by stories of people helping others through hardship. The EBCH can market itself as a team of life coaches who not only provide housing but also work hard to improve the lives of others on a person-by-person basis. Target audiences will develop a respect for the EBCH and want to create their own impact through donating.

The phrase, “Welcome Home,” has a double meaning. It resonates with the homeless as well as the donor pool. In addition to evoking the elements of warmth, privacy, and self-expression that come with one’s own “home,” it reminds donors that the East Bay is their home. The donors share a home with the people in need. Therefore, community members may see the donation as part of their social responsibility.

### **Dedication and Compassion**

When asked, “What sets the EBCH apart from other organizations?” the answers often came back to the dedication and passion of the EBCH staff and volunteers.

When investigating why people donate to organizations, research revealed that people donate to causes they believe in and have a personal connection to. They also donate to organizations that they believe to be good stewards of their contributions. Research with EBCH donors (current and former) as well as with the community validated these findings.

Thus, messaging that focuses on dedication and compassion/passion may resonate well with donors. Donating to the EBCH allows individuals to participate in a cause that is important to them. They will be donating to a group that will use their contributions thoughtfully.

### **Breaking the Homeless Stereotype**

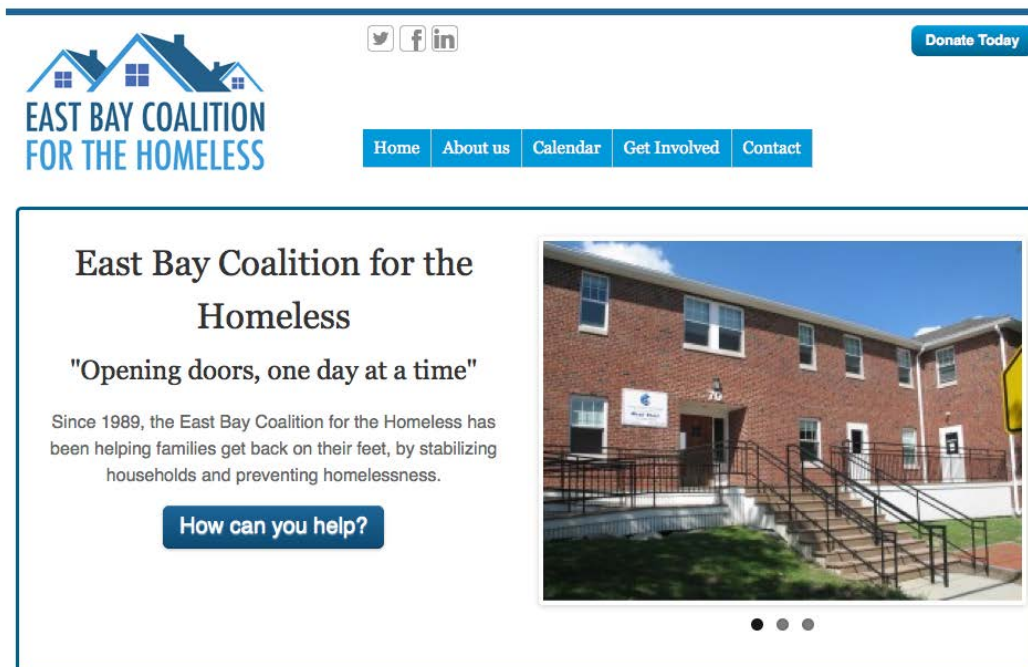
Even though survey respondents recognized the often-serendipitous nature of homelessness, the stereotypes of laziness, substance abuse and criminal behavior still abide. To successfully attract donors, EBCH messages need to personalize its clients, highlighting families with children and employed parents.

### **EBCH Success Stories**

Survey respondents’ comments also suggest that messages need to convey how successful the EBCH approach is. By illustrating how the longer-term provision of services helps families become independent, the EBCH can promote the “hand-up, not a hand-out” idea (without saying that exactly, since that phrase is used by other organizations). These comments underscore the importance of telling the EBCH story. Consider using narratives that illustrate different families’ journeys from becoming homeless to successfully managing social and financial concerns to finally becoming independent.

## Website

A website serves many functions: branding, education, communication. It also provides an analytical tool for tracking visits and visitors. As with the logo and tag line, a number of website designs were considered; the one below was selected and has been implemented



<http://eastbayhomeless.org>

### Goals

1. Design a professional website that communicates the EBCH's mission in a way that will attract new and current donors
2. Provide information about the EBCH and its programs
3. Facilitate transparency (and trust) about how the EBCH uses donors' contributions
4. Link the website's URL to the EBCH's social media outlets

### Features

1. Provide an easy way to donate
2. Provide easy access to information about programs
3. Feature donors
4. Showcase events and participants
5. Tell success stories
6. See Appendix J for a guide to using WordPress for your website.

# Communication Objectives, Strategies & Tactics

Communication Objectives	Communication Strategies
Use media most used by potential donors	Employ social media as well as public relations to get the EBCH message in as many media outlets as feasible
Seek reach, but focus on frequency as well	Use public relations tactics to reach a broad audience Use social media for more frequent, targeted communications Frequent messaging will be important since the EBCH is not well known
Be cost effective	Both social media and public relations efforts are less costly than traditional media

## Communication Tactics

Regularly post on Facebook  
 Start a blog and post regularly  
 Create a Twitter account and post regularly  
 Set of yearly events and utilize social media to enhance their success  
 Integrate social media with each other and with the website  
 Schedule regular Public Relations activities (press releases, PSAs)  
 Undertake Promotional activities (donor premiums, brochures, collateral item)

## Social Media

Social media outlets offer multiple ways to connect with current and potential donors. They offer a way to quickly increase word of mouth by allowing donors and volunteers to proudly post about the organization and their connections with it. We recognize that the EBCH cannot deploy all these social media tactics all at once. We suggest that the EBCH employ the “Crawl - Walk - Run - Fly Model” provided by Beth Kanter. Appendix E contains the specifics, which also can be found on this website: [https://www.educationnest.com/components/com\\_jshopping/files/files\\_products/PDF\\_files/PDFSlideShare/cwrf\\_model\\_bk\\_8\\_28\\_2012\\_120831100638\\_phpapp02.pdf](https://www.educationnest.com/components/com_jshopping/files/files_products/PDF_files/PDFSlideShare/cwrf_model_bk_8_28_2012_120831100638_phpapp02.pdf).



### Goals

1. Create and raise awareness
2. Connect and engage with current and potential donors
3. Stimulate conversations about homelessness
4. Make EBCH the “go-to” organization for information about homelessness and solutions
5. Facilitate fundraising

### Why Social Media?

1. Low cost means of connecting with target audiences.
2. Built-in methods (Tagging, Suggesting, and the like) for spreading information about EBCH to other networks
3. Built-in means of tracking impact of actions
4. Keeps EBCH top-of-mind for followers
5. Does require constant maintenance

### Suggested Social Media Outlets

1. Blogging
2. Facebook
3. Twitter
4. LinkedIn
5. Email marketing
6. YouTube/Vimeo



## Blogging

Blogs provide a voice for an organization and a way to share its concerns with others. Blogs can also foster connections within the charitable community.

### Goals

1. Relate to your audiences (donors, potential donors, those who influence policy) by telling stories
2. Provide a human face for the EBCH
3. Keep interested individuals informed about EBCH activities and initiatives
4. Let audiences know how EBCH spends donors' contributions
5. Stimulate conversations about relevant topics

### General Blogging Guidelines

1. Post consistently: establish a pattern for posts (once a week, once a day) so that readers know when to check back
2. The best person to write posts is the person most excited to do so
3. Consider using "guest posters" for special topics — such as a donor prior to a special event
4. Craft each post to tell a mini-story: beginning (ideally with an interesting hook), middle, end (the "so what," a call to action, a promise)
5. Use multi-media (pictures, videos) to break up text and keep readers interested
6. Create links to the EBCH website when appropriate

## Facebook

Everyone enjoys showing off a little bit. Facebook allows people to post photos of themselves at EBCH events and meetings. It's a great way to quickly draw people into the organization using followers' networks.



### Goals

1. Keep people informed about EBCH activities, thereby raising awareness
  - > Posts about up-coming events
  - > Posts about the event: pictures, comments, tag Facebook followers as often as possible so that the pictures will appear on their friends' pages as well
2. Keep people informed about homelessness
  - > Posts about current issues and controversies
  - > Posts that seek input and suggestions
  - > Posts that suggest actions (other than donations)
3. Keep people informed about EBCH successes
4. Interactions with board members and other volunteers
5. Interactions with donors (and potential donors)
6. Calls to action when appropriate

### **Facebook Guidelines & Strategies**

1. Post regularly
2. Almost always include a picture or video
3. When posting pictures of events, tag the people in them to spread the word to their networks
4. Try to tell a story
5. Ask your Facebook friends to “suggest” the EBCH: a way for current supporters to promote the EBCH to their friends and family.
6. Post to stimulate conversations: ask a question, pose a dilemma
7. Create links to the EBCH website when appropriate
8. Peak time for Facebook traffic is Wednesday at 3p.m.

#### **Good to Know**

Asking a question on Facebook is beneficial because it creates posts in response. Here are some examples.

“Who is excited for the Bike-a-Thon this weekend?  
“We are looking for new fundraising approaches.  
Any ideas?”  
“Please tell your friends to like us!”

## Twitter

Twitter serves as both a conversation starter and as a means to build and sustain the EBCH network of friends and donors.



### Goals

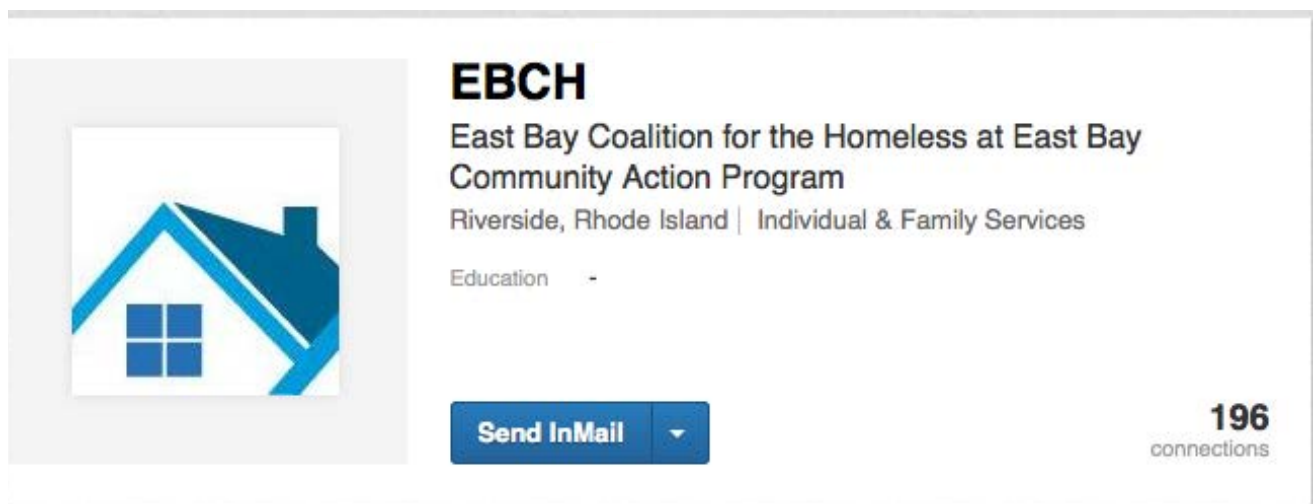
1. Reminders and updates for EBCH events
2. Direct followers to the EBCH website. For example, once pictures have been posted to Facebook, a tweet such as this would be appropriate: "New Bike-a-thon pictures up on Facebook! Check them out!"
3. Comments about relevant current events, especially comments that would help start conversations. For example, an Indiana homeless organization tweeted this, "What are you doing for Independence Day? We help our #homeless youth become independent, successful young adults."

### Twitter Guidelines & Strategies

1. Tweet regularly
2. Tie Tweets to events, about people
3. Take advantage of relevant trending hashtags to become part of on-going conversations and extend reach
4. Tweet to stimulate conversations: ask a question, pose a dilemma
5. Peak time for Twitter traffic is Monday-through-Thursday after 2p.m.

## LinkedIn

LinkedIn can help the EBCH connect with and build credibility with the types of individuals who might become donors and/or board members.



### Goals

1. Provide a professional presence for the EBCH
2. Connect to other organizations with similar or complementary missions
3. Solicit volunteers

### LinkedIn Guidelines & Strategies

1. EBCH staff and board members should include EBCH and its logo in their LinkedIn profiles
2. Join LinkedIn non-profit networks
3. Post volunteer "jobs" as a way to engage the professional community

## Email Marketing

Used judiciously, email is an easy way to stay in touch with the EBCH network, keeping the EBCH on the minds of friends and donors.



### News and Notes Spring 2012



#### INSIDE

- 2 Meet our board
- 3 What we do
- 4 Donors
- 6 Making a Difference
- 7 News & Notes

#### THE MAGIC OF WELCOME HOME

The sun set over Narragansett Bay giving way to another successful Welcome Home Annual Dinner and Auction. Nearly 180 guests generously bid on a variety of items on display at Rhode Island Country Club.

The event was sponsored by Minuteman Trucks, Inc. and Citizens Bank, the evening began with a cocktail hour and silent auction, and was highlighted by a week on Block Island, dinner and theatre packages and a chauffeured interlude to Newport Vineyards. Funds raised support our housing program for homeless families.

### Goals

1. Reminders and updates for EBCH events
2. Newsletter distribution

### Why Email Marketing?

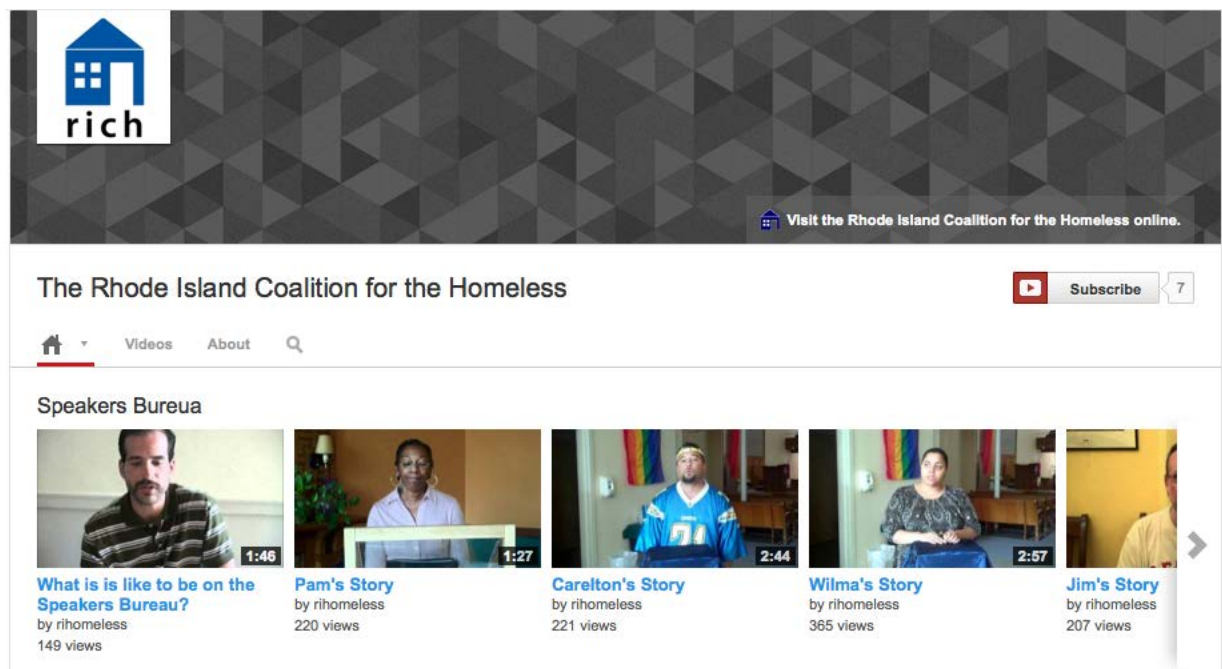
1. Low cost means of connecting with target audiences
2. Helps keeps EBCH top-of-mind leading to increased awareness and consideration/preference
3. Does require staff members to create newsletters and periodic emails

### Email Marketing Guidelines & Strategies

1. Don't make email contacts too frequent
2. Keep email contacts interesting and compelling – provide useful/helpful information
3. Keep email content short and to the point
4. Consider using a service such as Constant Contact
  - > Such services facilitate posting the newsletter to the EBCH Facebook page and website
  - > Services also make it possible to track email metrics: who received the email, who opened it, who responded, and the like.

## Youtube/Vimeo

Short videos provide a way to connect with target audiences by telling the EBCH story in a compelling manner.



### Goals

1. Awareness
2. Education
3. Consideration/Preference

### Why Videos?

1. Video uses sight and sound to create emotional connections that are difficult to approximate via other media
2. Can be linked with other social media outlets
3. Often passed along and recommended, creating additional word-of-mouth promotion
4. But, can be costly to produce, though they need not be.

### Examples from other homeless organizations

1. WARM Shelter: <http://vimeo.com/49316196>
2. RI Coalition for the Homeless' YouTube channel: <http://www.youtube.com/user/rihomeless>
3. RI Coalition for the Homeless example video: <http://www.youtube.com/watch?v=uZHyTv6L9VM>



## Public Relations

Public Relations activities create mutually beneficial relationships between an organization and its various constituencies. The EBCH will be able to connect with key individuals in the East Bay using public relations strategies and tactics.

### Goals

1. Create and raise awareness
2. Connect and engage with current and potential donors by keeping the EBCH “in the news”
3. Connect and engage with relevant media (i.e., journalists, TV reporters)
4. Connect and engage with relevant policy makers
5. Facilitate donations/fundraising

### Why PR?

1. Low cost means of connecting with target audiences
2. Helps keeps EBCH top-of-mind leading to increased awareness and consideration/preference
3. Does require staff members to attend to PR activities

### PR Tactics

1. Press Releases
2. Events
3. Public Service Announcements
4. Press Conferences
5. RIPTA Advertising

### Good to Know

You don't have to reinvent the wheel each time you want to issue a press release or hold a press conference. Example press releases, media release templates and press conference check lists are included in Appendices F, G, H & I.



## Press Releases/Media Advisories/News Coverage

### Goals

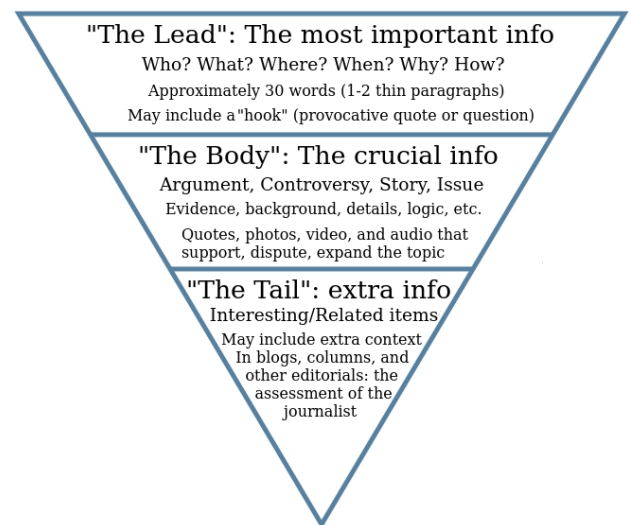
1. Gain exposure and build awareness
2. Tell the EBCH "story"
3. Present the director/staff/board members as experts on homelessness who can be called on to offer opinions and examples when reporters need that expertise
4. Encourage donations
5. Influence policy

### Why Press Releases?

1. Low cost means of connecting with target audiences
2. Helps keep EBCH top-of-mind leading to increased awareness and consideration/preference
3. Does require staff members to attend to PR activities

### Press Release/Media Advisory Tactics

1. Provide information about the seriousness of homelessness to the community
2. Provide information about homelessness
3. Put a personal face on homelessness
4. Promote success stories and testimonials so that target donors will hear about the EBCH and its accomplishments
5. Ideally, information will be something that only the EBCH can provide or that the EBCH can provide a perspective that makes the issue more understandable or makes it stand out
6. Appendix F contains a press release template and two example press releases.



### Good to Know

- Services such as CisionPoint, Vocus and PR Newswire allow an organization to manage and track the distribution of press releases and media coverage.
- Services often include profiles for media contacts (traditional as well as social media) as well as editorial calendars.

## Events

When people believe in an organization they often want to be more than just silent donors. Events allow those donors to bring their families and friends and possibly spend one-on-one time with those who are using the services and with EBCH staff and board members. Events can help create a greater sense of connection to and responsibility for the organization.



### Goals

1. Create and raise awareness through community involvement
2. Connect and engage with current and potential donors
3. Facilitate fundraising

### Why Events?

1. Immediate community involvement
2. Active involvement
3. Can generate publicity
4. Requires considerable time for planning and execution

### Event Planning Caveats from the Research

Survey responses from EBCH board members suggest that the EBCH should focus on a few signature events each year – at least until additional staff assistance is available. Board member responses revealed that board members would like to limit their planning and implementing of events to two or three per year and their attendance to two events per year.

## Suggested Events

1. Walk-together: like a traditional walk-a-thon, but emphasizing the idea that “we are all in this together” and that the EBCH needs the community’s help.
2. Sleep-Out: In a communal area in the East Bay, participants sleep in their cars to demonstrate what homelessness can be like. The event has visual and emotional impact and could generate good publicity.
3. Giving-Back: Special dinner to top donors to say, “Thank you” and to showcase what their donations have made possible.
4. Coordinate with local restaurants to sponsor nights when 10%-to-20% of the proceeds go to the EBCH.
5. Foster on-campus events at local colleges. The events will garner local press coverage and may generate new volunteers and future donors.
6. Formal Gala. A year or two after implementing the new marketing strategies the EBCH could hold a formal gala: an upscale event to allow current and future donors to meet the people their money benefits. It will allow them to converse with board members and staff of EBCH as well.

## Good to Know

Consider an online event planning service such as EventBrite.

- It’s free
- Can create customizable events
- Allows for online RSVPs, ticket purchases and donations
- Can post invitations to the EBCH Facebook page for increased exposure
- Can track event’s progress in real-time

## Event Planning Caveats from the Research

Survey responses from EBCH board members suggest that the EBCH should focus on a few signature events each year – at least until additional staff assistance is available. Board member responses revealed that board members would like to limit their planning and implementing of events to two or three per year and their attendance to two events per year.

## Public Service Announcements (PSAs)

### Goals

1. Create and raise awareness
2. Tell the EBCH “story”
3. Connect and engage with current and potential donors
4. Facilitate fundraising

### Why PSAs?

1. Low Cost
2. Can often find an ad agency that will create them pro-bono

### PSA Guidelines

1. PSAs usually are created for 15, 30, 60 or 90-seconds
2. PSAs are aired for free – but can be pitched to media outlets
3. See Appendix G for a template and word length suggestions

## Press Conferences

### Goals

1. Create and raise awareness
2. Tell the EBCH “story”
3. Create buzz
4. Facilitate fundraising

### Why Press Conferences?

1. A very public way to make major announcements
2. Generate excitement and gain news coverage

### Press Conferences Guidelines & Strategies

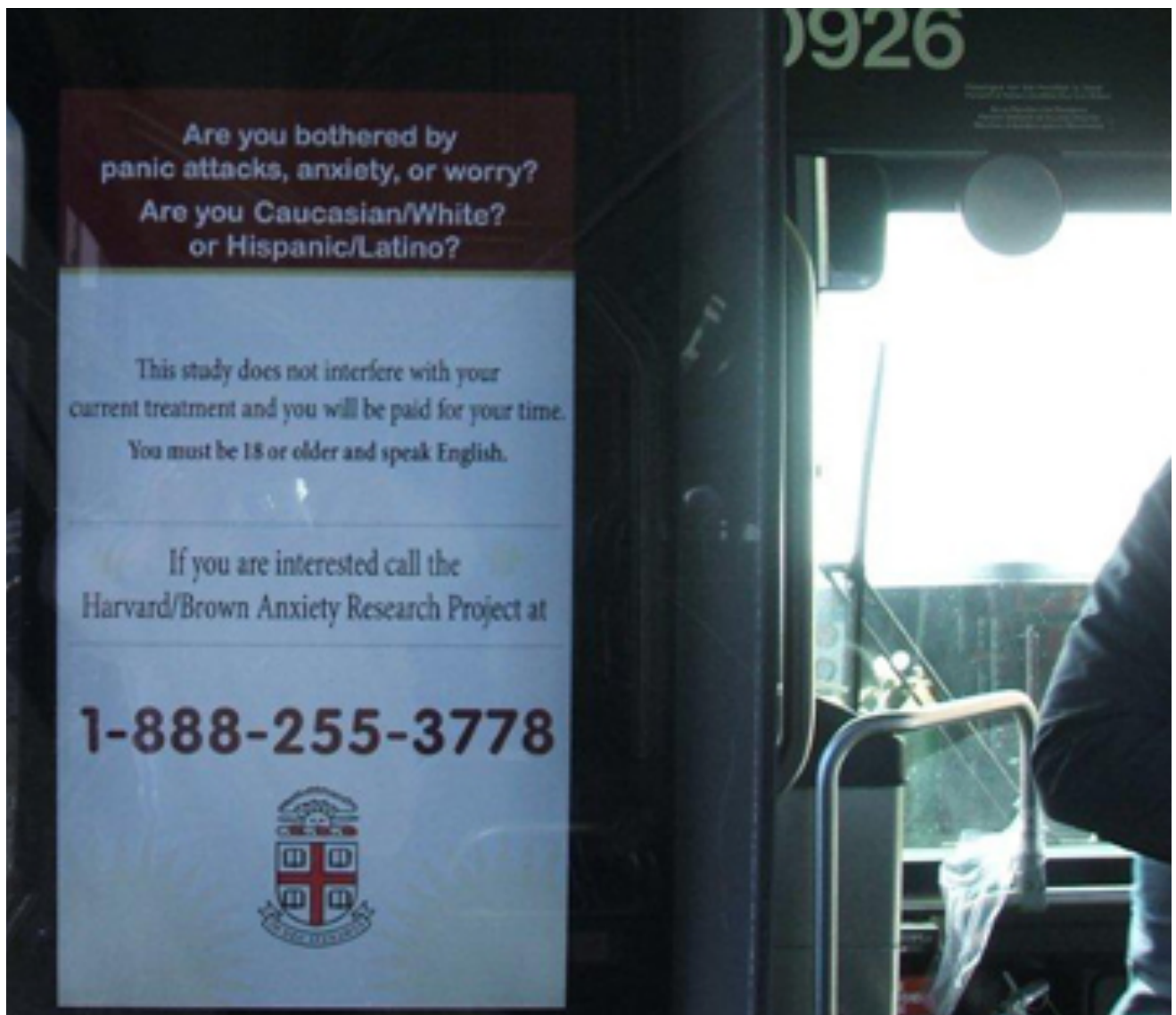
1. Only schedule a press conference when the announcement is truly newsworthy
2. Prepare press kits with information about the EBCH and information directly relevant to the announcement. Press kits are distributed to press conference attendees.
3. See Appendices H & I for Press Conference and Press Kit suggestions.

## RIPTA Advertising

A program of “interior bus” advertising is available and might be a good place for information about the EBCH. Potential clients as well as potential donors ride the bus.

The EBCH may be able to secure sponsors for these ads if the sponsors were also identified on the posters.

The program is coordinated through Direct Media ([www.directmediausa.com](http://www.directmediausa.com)).



## Promotions

### **Goals**

1. Create and raise awareness
2. Connect and engage with current and potential donors by keeping the EBCH “top of mind”
3. Facilitate donations/fundraising

### **Why Promotions?**

1. Lower cost means of connecting with target audiences
2. Helps keeps EBCH top-of-mind leading to increase awareness and consideration/preference
3. Does require up-front costs + inventory

### **Suggested Promotions**

1. Donor premiums
2. Business Cards and Rack Cards
3. Brochures
4. Wrist Bands & T-shirt

## Donor Premiums

There are a number of ways to recognize donors. While none of these addresses the primary motivation for giving to a cause one believes in, each may provide an incentive to give just a bit more or to give regularly.

1. The EBCH could establish “levels of giving” to entice people to stay with the organization longer. For example after donations reach \$500, a person would receive an EBCH sweatshirt. East Bay businesses might be approached to contribute these types of awards, such as a free meal at a local restaurant.
2. When made public, listing donor names by giving level can create incentives to give at the next level.
3. Donor names and photos could be posted on the website.
4. Donor stories could also be featured on the website, with donors talking about how proud they are to be associated with the EBCH and the benefits they’ve seen in their communities as a result of their donations and support.
5. A “Donor of the Year” award could be created for the donor who has done the most to help the organization as a whole, not just financially.
6. Small thank-you certificates could be distributed for each donation received.

	<b>Level 1: \$1 - \$249</b>
	<b>Level 2: \$250 - \$499</b>
	<b>Level 3: \$500 - \$999</b>
	<b>Level 4: \$1,000 - \$2,499</b>
	<b>Level 5: \$2,500 - \$4,999</b>
	<b>Level 6: \$5,000 - \$9,999</b>
	<b>Level 7: \$10,000 +</b>

## Business Cards and Rack Cards

Business cards contribute to a consistent presentation of the EBCH's identity and can facilitate word of mouth communication about the EBCH. Having business cards of staff members and board members available at events allows attendees to pick up contact information that they may use in the future.




**100 Bullocks Point Avenue  
East Providence, Rhode Island 02915**

**p: 401-437-5104  
f: 401-324-6678**

**[www.eastbayhomeless.com](http://www.eastbayhomeless.com)**

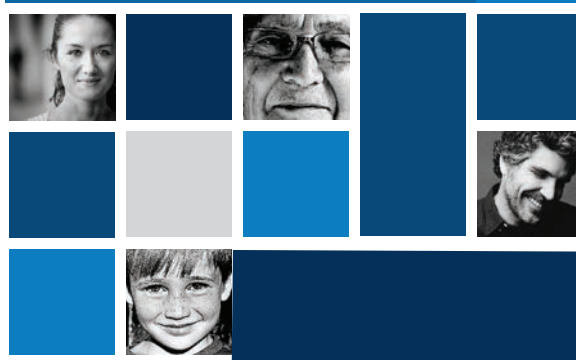


Rack cards provide basic information about the EBCH, are reminders of the organization's services and provide contact information. Two of the steps toward deciding to donate involve knowledge and consideration. When placed in strategic locations around the East Bay (such as on counters of businesses) these cards can facilitate both steps.



**EAST BAY COALITION  
FOR THE HOMELESS**

bridging  
**HOPE**  
with opportunity



East Bay Coalition for the homeless has Praesent consectetur tempor bibendum. Pellentesque non est sapien, id bibendum sem. Duis a augue sit amet lorem condimentum sagittis. Nulla facilisi. Duis quam diam, pretium eu porttitor vitae, sollicitudin non odio. Fusce blandit vehicula velit, eget malesuada elit iaculis eget. Aenean ligula massa, consectetur sit amet rhoncus vitae, aliquam at tellus.

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it's a  
**Hand Up**  
not a hand out

Nulla facilisi. Duis quam diam, pretium eu porttitor vitae, sollicitudin non odio.

We provide the following services to our clients to help give them the help they need toward a new life:

#### Lead Education

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#### Emergency Rental Assistance

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**EAST BAY COALITION  
FOR THE HOMELESS**

100 Bullocks Point Avenue  
East Providence, RI 02915  
Telephone: (401) 437-5104

Donate by visiting our website:  
[www.eastbayhomeless.com](http://www.eastbayhomeless.com)





## EAST BAY COALITION FOR THE HOMELESS

*For more than 20 years, the East Bay Coalition for the Homeless has been helping families get back on their feet by stabilizing households and preventing homelessness.*

---



---

## What we do...



### Housing Programs

Employed RI residents who meet the federal definition of homeless receive case management and support services to help reach and maintain financial stability

### Emergency Rental Assistance

RI residents experiencing a temporary housing crisis due to fire, condemnation, domestic violence, foreclosure or lack of employment can take advantage of our emergency funds

### Lead Education and Outreach

Education and services are available to property owners and renters to help prevent childhood lead poisoning

*Help us open doors, one day at a time*

## Wrist Bands

The idea of the wristbands is to create awareness at all times for wearers and to create a buzz by offering an item that people “must have.” Schools, clubs, and any other organizations could support the EBCH, using the wristbands as fundraisers. Wristbands can be easily created, with the color and name suitable to the organization.

The price for the wristbands varies by quantity, with larger orders having a cheaper per-unit price. On some websites 100 wristbands were priced at \$100.

[www.wristbandconnection.com/make-your-own-wristbands/](http://www.wristbandconnection.com/make-your-own-wristbands/)  
[www.wrist-band.com/](http://www.wrist-band.com/)



## T-Shirts

T-shirts can be sold and/or given away at events and as prizes for volunteers. As with the wristbands, schools, clubs, and any other organizations could support the EBCH, using the t-shirts as fundraisers.

T-shirts also are a quiet means of creating awareness.



# Campaign Evaluation

## What to Track

### **Website**

1. Number of Unique visitors (& number of repeat visitors)
2. Time spent on website for each visit
3. Most visited page(s)

### **Social Media**

1. Increase in number of Facebook friends & Likes
2. Number of Facebook posts/comments (also track number of positive vs negative comments)
3. Number of Twitter followers
4. Number of re-Tweets
5. Number of blog followers and posts/comments

### **Events**

1. Track number of attendees
2. Track number of new donors/volunteers from attendee lists

### **Traditional Media**

1. Track number of media mentions
2. Track number of column inches (can compute a dollar value based on the medium's ad rates)

### **Funding**

1. Track number of new donors
2. Track donation amounts
3. Track rate of donor retention

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# Appendix A

Fall 2012 Research Report and Survey

## **East Bay Coalition for the Homeless Marketing research Survey Report**

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## Executive Summary

This report discusses the development and analysis of a survey that is the first step in the process of assessing the East Bay Coalition for the Homeless' (EBCH) brand and current image. Data from this study will later inform a marketing strategy to increase awareness and funding for the organization.

This survey targets the EBCH and East Bay Community Action Program (EBCAP) boards. The process started with secondary research, establishing research objectives, and drafts of test surveys. A final survey was distributed to both boards, allowing researchers to use a census method when collecting and coding the final data.

Key findings include:

1. A lack of awareness regarding EBCH is as predicted.  
Board members believe there is a positive perception of the EBCH among the very small population within the community that is aware of the organization.
2. The current marketing strategies are not effectively telling the "EBCH story."
3. Future marketing strategies can build on the EBCH's strengths of a dedicated staff and board.
4. Future strategies might also take advantage of the EBCH's special niche in the Rhode Island service-to-the-homeless community: the provision of services to create independent families who can move forward without needing continuing support.

The class working for EBCH during the spring semester will finalize community and donor surveys and then use the results from all the surveys to develop marketing strategies to build the EBCH brand image and to increase donations.

## Introduction & Background

The EBCH's mission is to house homeless families with children and provide them with the skills necessary to become independent. Families receive an education and job training as well as food and nutrition services. These services continue until families are stable, living in a home that is affordable. EBCH also offers Emergency Rental Assistance services to help those who are in danger of becoming homeless. More recently, the EBCH has also become a Certified Lead Center offering education concerning lead poisoning. However, the EBCH has been struggling to receive sufficient funding for the services provided. Thus, the EBCH submitted a proposal to the RWU Community Partnerships Center (CPC) requesting help with marketing research and marketing strategies to increase the awareness and donations.

After discussions with the Diane Smith, the EBCH Director, Susan Schenck, EBCAP COO, Arnold Robinson, CPC Director, and Kathy Micken, RWU Professor of Marketing, the scope of the project was defined to cover the fall 2012 and spring 2013 semesters.

The fall semester marketing research class would be responsible for the following activities.

- Create, field and analyze a survey of EBCH and EBCAP board members.
- Draft a survey to be sent to EBCAP newsletter recipients – who represented current and former donors to the EBCH as well as community members who were not EBCH donors.
- Present the results to the EBCH board.

The spring marketing class would be responsible for the following activities.

- Finalize the second survey, field it and analyze the data.
- In collaboration with the Web Development Center class, create a marketing plan for the EBCH to include
  - » a new website
  - » a new logo, and
  - » specific marketing strategies.

The report that follows presents the results of the survey of the EBCH and EBCAP boards.

## Research Process

### Research Objectives

Discussion with the EBCH staff suggested that the overall objective was to examine attitudes toward the EBCH. The following sub-objectives were identified for the research with the EBCH and EBCAP boards.

1. Identify the organization's current image.
2. Identify alternative messages to convey the EBCH's story.
3. Assess current fundraising efforts.
4. Identify how best to communicate the new image.

### Secondary Research

Before creating the survey, we conducted research about the EBCH as an organization. We reviewed the website, brochures, and learned about programs and activities. Diane Smith, the Executive Director of the EBCH, and Amanda Campopiano, Housing Coordinator, met with us to discuss the proposal and the organization's information needs. We also met with a former board member for a "second opinion" and to review potential survey questions. Finally, we researched other Rhode Island organizations that provide services to the homeless. Importantly, we came to understand that these organizations are competitors for dollars more than for than clients, as most not provide the long-term housing case management as the EBCH does.

### Research Framework

To address the objectives, we used the "hierarchy of effects" model as a framework for the research design. This framework addresses EBCH's concerns by employing different constructs to create a complete picture of relevant attitudes and behaviors, beginning with awareness. An integral component of awareness is the organization's image and the story that EBCH tells about itself. Attitude models also guided the research, as they provided a structure for understanding the perception of the EBCH and how attitudes might be changed. Another way to think about image is through the lens of positioning, which addresses how an organization is perceived relative to others that offer similar services. Finally, theories of involvement, image congruity and reference groups helped guide questions about how engaged board members and donors are with the EBCH.

Using these frameworks as a guide, the following research questions provided the foundation for the survey.

- How is the EBCH perceived?
- Is the perceived image desirable?
- What would the board want the EBCH image to be?
- What message would best communicate the EBCH "story" and attract donors?
- How do perceptions of homelessness and of the homeless impact the EBCH's image?

What is the Board's perception of how aware people in RI are of the EBCH?  
What is the Board's perception of what people in RI know about the EBCH and its programs?  
What is the Board's perception of how people in RI evaluate the EBCH?  
What is known about donors (past, current, & repeat)?  
What activities might increase donors and donations?

How well known (in RI) are EBCH board members?  
To what extent are EBCH board members perceived to be community leaders?  
To what extent are EBCH board members identified with the EBCH?  
What is the level of personal relevance of the EBCH to board members?  
What do board members think about current EBCH fundraising activities?  
What are board preferences for additional/different fundraising activities?

### **Survey Development**

We designed a survey for distribution to the EBCH and EBCAP board members. Using the Qualtrics online survey platform, we created an anonymous survey of with 29 questions grouped into five topic areas.

Roles of current or former EBCH and EBCAP board members

How established the organization is in the community

Awareness of the EBCH and perceptions of its image

What the most effective messages would be for telling the EBCH "story"

Information about fundraising efforts

To avoid bias in responses, questions that might be taken as sensitive were constructed using accepted protocols. For example, instead of directly asking about EBCH weaknesses, the question was phrased to make it acceptable to suggest areas that might need improvement.

We collaborated with an honors junior service-learning class to construct the narratives that were presented in the "most effective messages" section. Students in this course investigated homelessness in Rhode Island and wrote six potential narratives. We refined that set to the four that were tested in the survey.

We remained in contact with the Director while developing the survey to make sure that we were on track and that the questions were appropriate for the board members. The survey was fielded only after the Director approved both the survey and the email invitation wording.

### **Survey Distribution**

The survey link was emailed to 28 board members, 13 current and former EBCH board members and the 15 members of the EBCAP board (two board members were provided paper copies). Survey respondents were ensured anonymity and confidentiality.

## Findings and Analysis

### Statistical Analysis

Because of the small number of respondents, the analysis below primarily presents the number of people responding to each question category. The discussion also separates EBCH board and EBCAP board responses. When a question asked for written comments, results are reported both in summary form along with individual exemplars.

### Description of Survey Respondents

Sixteen EBCH and EBCAP board members responded to the survey, eight from each board. The respondents included seven males and nine females. Two have been a board member for less than one year, six have been on the board for 1-to-3 years, three have been on the board for 4-to-6 years, and five have been on the board for more than six years.

### I. EBCH Awareness

#### A. General Awareness

The survey included one question to assess board members' perceptions about how well known the EBCH is.

#### What percentage of people in the East Bay do you think are aware of the EBCH's programs?

*EBCH & EBCAP Board Responses:* All respondents acknowledge that the EBCH is not well known among the East Bay community. The specific percentages are not important; rather the acknowledged lack of awareness is the issue that needs to be addressed.

Awareness of EBCH by East Bay Community (% based on respondents' perceptions)		
	EBCH Board Responses	EBCAP Board Responses
I don't know	1	1
0%		
10%	2	1
20%	4	1
30%	1	4
40%		
50%		1

## B. Awareness among Board Members' Networks

The survey asked a series of questions to assess how often board members talked with people in their networks about the EBCH and about their own involvement with the EBCH. In general, EBCH board members do talk with their friends and business contacts about their own involvement and would encourage a friend to become involved. They also would continue to advocate for the EBCH even if they were no longer on the Board. When it comes to interacting with donors, however, board members were less enthusiastic.

**Do business and social acquaintances know that the individual is a member of the EBCH or EBCAP board? Responses used a 7-point scale from Only a few people know (1) to Almost everyone knows (7).**

EBCH board membership seems to be better known among board members' networks than EBCAP board membership does. Board members' conversations about the EBCH is an important first step in spreading the word about the EBCH.

Do People in your Network Know You are an EBCH/EBCAP Board Member?							
	Almost Everyone (7)	6	5	4	3	2	Only a Few (1)
EBCH Board	3	2	1	2			
EBCAP Board		3		1	3	1	

**Would EBCH board members encourage a friend to become involved in the EBCH? Responses used a 5-point scale from Very Unlikely (1) to Very Likely (5).**

EBCH board members are likely to encourage friends to join them in EBCH activities. Again, this is a positive finding.

Encouraging a Friend to Participate in EBCH Programs					
	Very Likely (5)	4	3	2	Very Unlikely (1)
EBCH Board	6	2	3		

**If you were not on the EBCH board, how likely would you be to advocate on behalf of the EBCH? Responses used a five-point scale from Very Unlikely (1) to Very Likely (5); only the top three categories were used.**

As with the responses to previous questions, responses here indicated that EBCH board members are committed to the organization and its mission. It would be helpful to know why not all are either “Likely” or “Very Likely” to advocate for the EBCH.

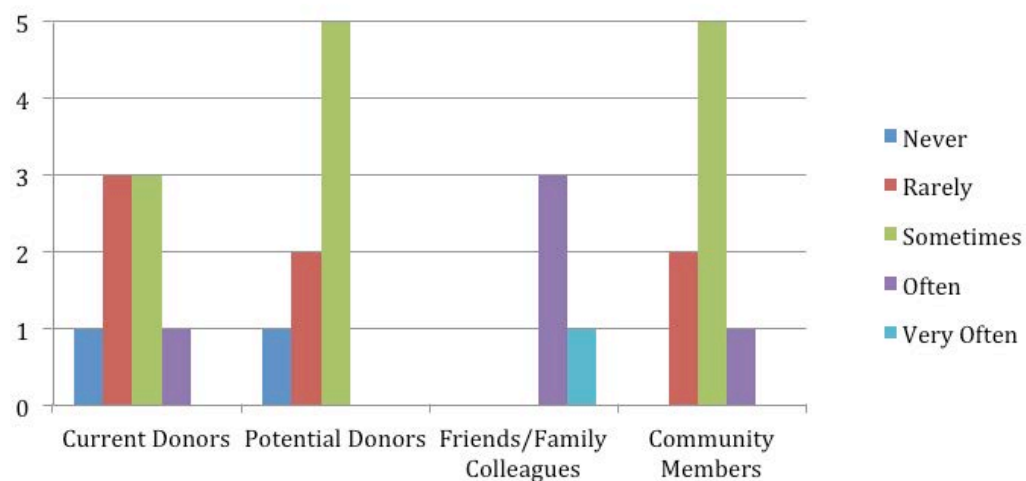
Likelihood of Continuing to be an EBCH Advocate			
	Very Likely	Likely	Somewhat Likely
EBCH Board	2	2	3

**How often are you able to speak with other people about the EBCH?**

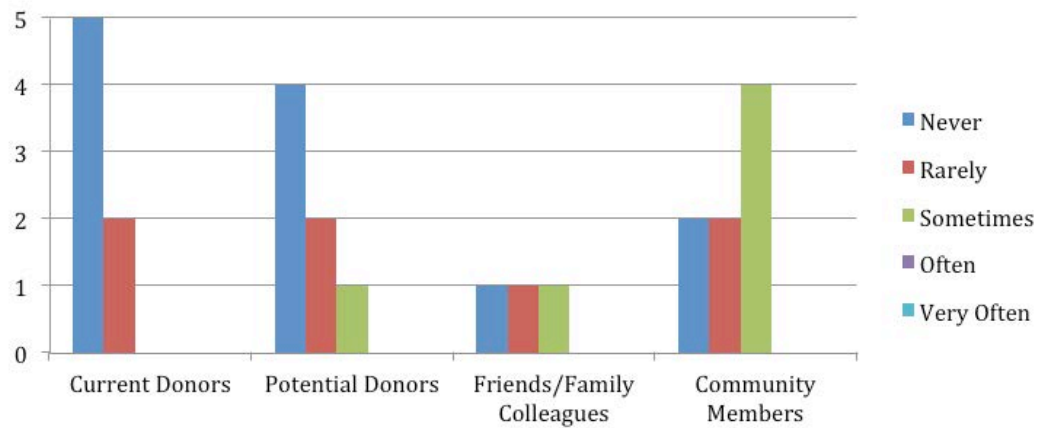
While the earlier questions assessed the range of individuals that board members speak with, this question directly included board interactions with current and potential donors.

*EBCH & EBCAP Board Responses:* Most board members are not actively reaching out to current and potential donors on behalf of the EBCH. Some of the reasons may be found in the responses to a question about contacting high-profile donors (in the Fundraising Section below). Respondents wrote that they have to be very careful when talking with business clients. Others said that they were uncomfortable making “cold calls”; in a similar vein others said they were uncomfortable asking friends for donations.

### EBCH Board Contact with Others about the EBCH



### EBCAP Board Contact with Others about the EBCH



## II. Current EBCH Image

To investigate the current EBCH image, the survey asked about EBCH strengths and weaknesses, factors that differentiate the EBCH from other organizations that address homelessness, and the impact on the East Bay community if the EBCH did not exist.

### A. EBCH Strengths and Weaknesses

#### If you were asked to describe the EBCH, what strengths, if any, would come to mind?

*EBCH & EBCAP Board Responses:* Members of each board agree that the EBCH's primary strengths lie in its staff and in the services offered. EBCH staff, with their passion, commitment and dedication to the mission/cause was the most often mentioned strength, closely followed by comments about the importance of the services and support the EBCH offers to the East Bay community. Not too surprisingly, the EBCH board members also know that their commitment to the mission/cause is an important strength. Other characteristics garnered single mentions as noted in the table below.



**If you were asked to describe the EBCH, what weaknesses, if any, would come to mind?**

*EBCH & EBCAP Board Responses:* Once again, there is agreement across the two boards that the primary weakness is that the EBCH does not have a well-known or well-defined image, due in part to a lack of publicity. Correlated weaknesses are in the fundraising realm, with EBCH board members specifically pointing to there being few new donors (the organization relying on the same set of repeat donors) and few high-profile donors.

EBCH Weaknesses		
	EBCH Board Responses	EBCAP Board Responses
Awareness/Branding/Publicity	6	6
Fundraising	3	2
Board Coordination	3	
Donors (Few new & few high-profile)	3	
Last Minute Changes	1	
Eligibility Criteria		1
None		1

## B. Positioning the EBCH

Since questions about an organization's strengths and weaknesses often tend to elicit internally-focused responses, the survey included two other questions to help understand how the EBCH is positioned relative to other organizations that address homelessness.

### What makes the EBCH different from other organizations that help the homeless?

*EBCH & EBCAP Board Responses:* Responses from the EBCH board are more specific and varied than those from the EBCAP board. EBCH board members view the case management function that helps families become independent as the primary point of distinction. Sub-elements of that function (not simply being a shelter and requiring that clients be employed) also are identified. The most frequent response from EBCAP board members that "I don't know" or "I am not sure" reflects the lack of knowledge about just what the EBCH does, further underscoring the awareness/branding issue.

EBCH Points of Distinction		
	EBCH Board Responses	EBCAP Board Responses
Helps Families Become Independent (Hand Up Not a Hand Out)	3	1
Not a Shelter	3	
Clients Must Be Employed	2	
Supportive of Local Needs	1	
Small Organization	1	
Don't Know/Unsure		3
Are No Similar Organizations		1

### If the EBCH did not exist, what would be the impact on the East Bay Community?

*EBCH & EBCAP Board Responses:* Members of both boards agree that without the EBCH and its services, the East Bay would see an increase in homelessness. EBCH board members augmented this situation by suggesting that EBCH clients would need to seek assistance from other organizations, which might not provide effective services. It is interesting to note, however, that three EBCAP board members were not certain what the impact would be, suggesting once again that perhaps the awareness issue begins close to home.

East Bay Community Impact if No EBCH		
	EBCH Board Responses	EBCAP Board Responses
Increase in Homelessness	3	2
Less Housing/Resource Availability	3	2
Clients Have to Go Elsewhere	2	
Less Lead Paint Awareness	1	1
Not Sure		3
None		1

Responses to the four questions here point to the EBCH's distinctiveness residing in the focus on helping families become independent, on their developing skills and attitudes that will keep them from becoming homeless in the future, once they no longer have access to the EBCH's services. Questions in the next section addressed how best to convey that message.

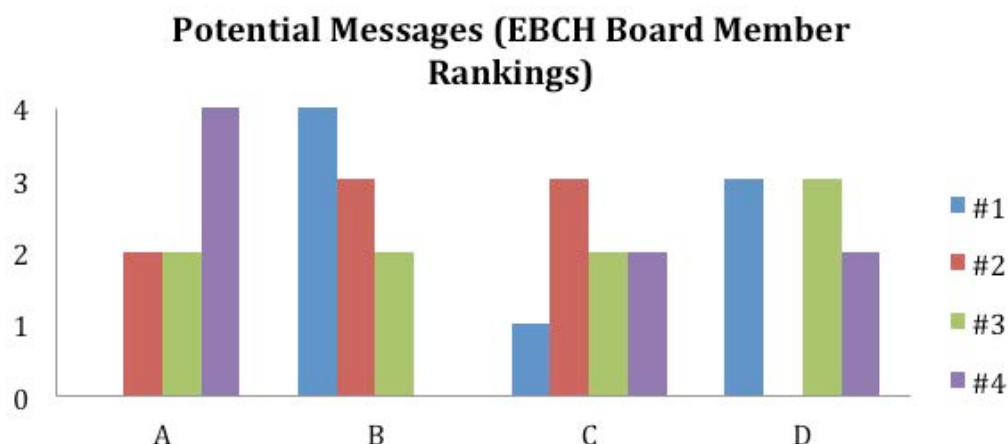
### III. Potential EBCH Messaging

#### A. What message or story would best communicate about the EBCH, and attract donors?

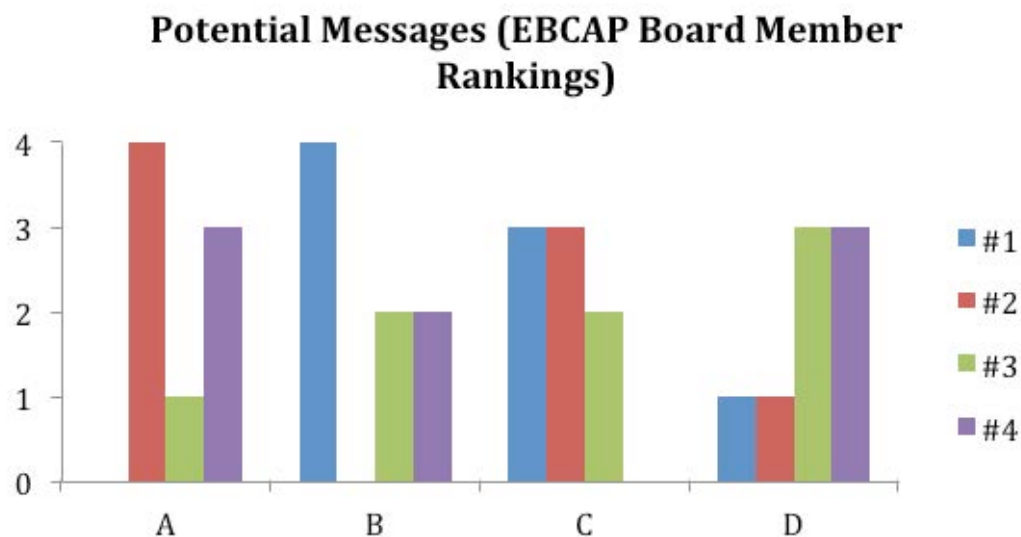
Listed below are four potential messages that the EBCH might use to tell its story in order to attract potential donors. Rank the messages from 1 to 4, from the most effective message (1) to the least effective message (4).

- A. Forty percent of the homeless are families. Help the East Bay Coalition for the Homeless provide affordable and safe transitional housing while these families get back on their feet.
- B. Homelessness does not discriminate. It doesn't matter if you are well-educated, have a beautiful family, or have fought for our country. The East Bay Coalition for the Homeless helps people thrive in society through transitional housing, a work requirement, and skills training. Homelessness can happen to anyone, and the EBCH has been able to make a difference in the lives of hundreds of Rhode Islanders. But we cannot do it alone; we need your help to make this difference, too.
- C. Homelessness can happen to anyone; homelessness does not discriminate. It can happen to families just like yours: fathers and mothers, uncles and aunts, sons and daughters. The East Bay Coalition for the Homeless reaches out to people in need and offers them a helping hand. The EBCH has made a difference in the lives of hundreds of East Bay families, but we cannot do it alone. We need your help to continue making a difference in our community.
- D. It's your neighbor whose husband has cancer. It's your co-worker who lost her job in a bad economy. It's the soldier who lost his arm and can no longer work. Homelessness can happen to them, and it can happen to you. The East Bay Coalition for the Homeless has a track record of keeping families off the streets and helping them overcome life's challenges.

*EBCH Board Responses:* Message B (homelessness does not discriminate + focus on independence) garnered more #1 rankings as the most effective message. Message D (identifying the homeless as people one might know + the independence focus) would be the next potential effective message. Messages B and C (Homelessness can happen to anyone) had equal numbers of #2 rankings. Message A (homelessness statistics) was ranked as the least effective.



*EBCAP Board Responses:* Again, message B (homelessness does not discriminate + focus on independence) was ranked as “most effective” by more respondents. In contrast to the EBCH board responses, here message A (homelessness statistics) was ranked as the next potentially effective message – thought some ranked it last. Message C (Homelessness can happen to anyone) garnered an equal number of #1 and #2 rankings. Message D (identifying the homeless as people one might know + the independence focus) had the most #3 and #4 rankings.



Overall, board member responses suggest that a message that helps break the stereotype of a homeless person and that also emphasizes the EBCH focus on helping families become independent would be the best message.

## **B. Are there other messages that would be more effective?**

*EBCH Board Responses:* EBCH board members’ comments advocated a “short and sweet” approach, using superlative words and strong visual language. Some added that it would be important to highlight the reality of job loss and the fact that homelessness can affect anyone, not just a homeless stereotype. Respondents also indicated that it is important to emphasize that the EBCH is a hand up, not a hand out, and include phrases such as “we need your help.” Members also felt that including a statistic in the message could be very powerful.

*EBCAP Board Responses:* EBCAP board respondents tended to suggest that a combination of all the suggested messages would be a good approach. One board member suggested referencing the housing and foreclosure crisis. Another respondent wrote that the suggested messages were too dramatic and vague and felt that highlighting specific cases or statistics would be more effective.

#### IV. EBCH Fundraising Activities

Questions addressed the effectiveness of current fundraising activities, how involved individual EBCH board members ought to be in fundraising, whether the EBCH/EBCAP relationship helps or hinders fundraising, and how best to reach out to donors.

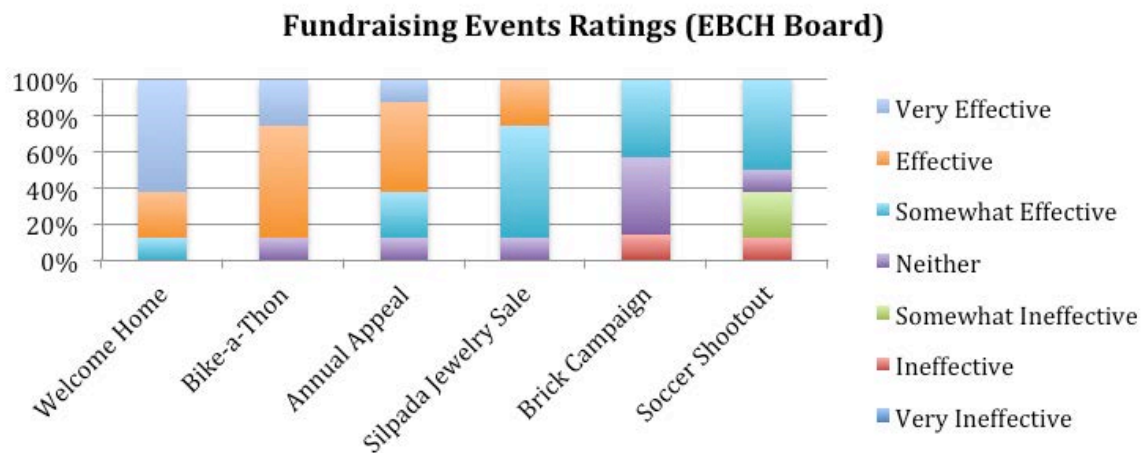
##### A. How effective is each of these fundraising activities/events at increasing donations?

Responses used a seven-point scale from Very Ineffective (1) to Very Effective (7).

*EBCH Board Responses:* Four of the fundraising events are considered to be effective (since the mean ratings are above the neutral point – a rating of “4”). The annual Welcome Home Dinner is rated as the most effective, with an almost “perfect” mean rating of 6.5 (out of a possible 7).

Fundraising Event	Mean Rating	Standard Deviation
Welcome Home Annual Dinner & Auction	6.50	.76
Bike-a-Thon	6.00	.93
Annual Appeal	5.63	.92
Silpada Jewelry Sale	5.13	.64
Brick Campaign	4.14	1.07
Soccer Shootout	4.00	1.20

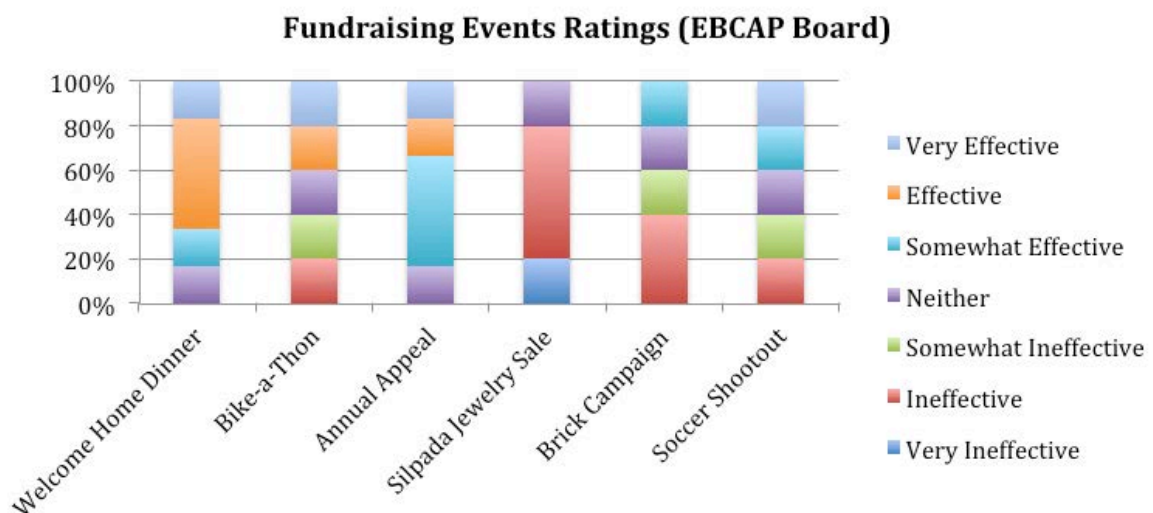
The spread of the ratings is presented in the chart below. Only the Brick Campaign and the Soccer Shoot Out received “Ineffective” or “Somewhat Ineffective” ratings. All other activities were rated at the neutral point or higher.



*EBCAP Board Responses:* In contrast to EBCH board members, EBCAP board members rated two fundraisers as effective (since the mean ratings are above the neutral point – a rating of “4”). Again, the annual Welcome Home Dinner is rated as the most effective event.

Fundraising Event	Mean Rating	Standard Deviation
Welcome Home Annual Dinner & Auction	5.67	1.03
Annual Appeal	5.33	1.03
Bike-a-Thon	4.40	2.07
Soccer Shootout	4.20	1.92
Brick Campaign	3.20	1.30
Silpada Jewelry Sale	2.20	1.10

The spread of the ratings is presented in the chart below. In contrast to the EBCH board ratings, almost no event received many “Very Effective” ratings – though the Welcome Home Dinner did get 3 (of the 8) “Effective” ratings. The explanation may be that EBCAP board members may simply not be very familiar with these activities.



## B. The role of the EBCH board in fundraising events

EBCH board members were asked more specific questions about their role in fundraising events: both planning and attending. Consistent with comments in response to other survey questions, board members would like to be somewhat less involved in the events.

	2 Events	3 Events	4 Events
How many events should EBCH Board Members plan and implement each year?	3	3	2
How many events should an individual board member attend each year?	4	2	2
How many fundraising events should the EBCH hold each year – whether or not the Board is involved?	3	4	1



### C. How the Relationship with the EBCAP helps (or hinders) EBCH fundraising.

**Having the EBCH under the umbrella of the EBCAP helps the EBCH's fundraising efforts. Responses used a seven-point scale from Strongly Disagree (1) to Strongly Agree (7).**

*EBCH & EBCAP Board Responses:* There was no clear consensus on the part of either board about whether the EBCAP/EBCH relationship helps or hinders EBCH's fundraising efforts. While EBCH board responses ranged from Somewhat Disagree (3) to Strongly Agree (7), five of the eight responses were "Neither" (4). EBCAP board responses similarly ranged from Somewhat Disagree (3) to Strong Agree (7), but encompassed a wider span of possible answers. Four responses were spread among the three "agree" options; two individuals responded "Neither" (4) and two ticked Somewhat Disagree" (3).

### **In what ways does the relationship between the EBCH and EBCAP help or hinder the EBCH's fundraising events?**

*EBCH & EBCAP Board Responses:* There is some agreement across boards that one problem is competition for the same donors. As noted in the introduction to this report, there also is a similar competition between the EBCH and other organizations that help the homeless. In a small state such as Rhode Island this competition is intensified. EBCH board members also identified other problem areas, such as similar fundraising events, which may confuse potential donors, as well as a perceived lack of coordination/cooperation. Not too surprisingly, EBCAP board members viewed the broader EBCAP resources and visibility as helping the EBCH efforts.

How the EBCH/EBCAP Relationship Helps or Hinders EBCH Fundraising		
	EBCH Board Responses	EBCAP Board Responses
Compete for the Same Donors	2	2
Fundraising Events too Similar	2	
Organizations Work Around each other Rather than Together	2	
EBCH Needs its own Link for Online Donations	1	
EBCAP Provides Resources & Credibility		3
No Impact		1

#### **D. Reaching out to donors, especially high-profile ones.**

**In your experience, what are the most effective media outlets for communicating with potential donors?**

*EBCH & EBCAP Board Responses:* Special events, social media, television and radio were identified as the best ways to communicate with potential donors. Newsletters (both electronic and paper) and email were the next most frequent responses. The value of special events, however, was questioned by some as being targeted more toward current rather than new donors.

**How might the EBCH reach out to high-profile individuals within the Rhode Island charitable community?**

*EBCH & EBCAP Board Responses:* Concrete suggestions that would facilitate “making the ask” include brochures targeted toward donors (instead of EBCH clients, as is the case with current brochures), hiring a fundraising consultant to approach corporations, and holding events that would attract high-profile donors and/or would be attractive to a high-profile sponsor. Some respondents wrote that many of the high-profile donors already are tied in with other charities, making it difficult to ask them to contribute to the EBCH.

## **Limitations**

This section is short because we only surveyed the EBCH and EBCAP boards and therefore do not have a broader picture of how the EBCH is perceived. These results provide an “insider” perspective, not those of current and former donors as well as the East Bay community. Additionally, not every board member responded to the survey which leads to the incomplete picture.

Nevertheless, the results do indicate that board members are cognizant of the image and awareness problems – and the concomitant fundraising issues. The responses suggest a board that is willing to help, but that would like some assistance.

## Board Survey

### Welcome to the Roger Williams University EBCH Survey!



#### About This Survey

You are invited to participate in a survey to evaluate the EBCH's role in the East Bay community. We are asking for your help because you are or have been an EBCH or EBCAP Board member.

Your responses are important because they will help guide future EBCH marketing strategies that will improve its image in the East Bay community and lead to increased contributions.

Your participation will involve completing this short survey which should take about 10 minutes. You may choose not to answer some or all of the questions. You may leave the survey at any time before completing it. Your name will not appear on your completed survey and no identifying information is being collected.

You can start the survey, pause and return later to finish, if you wish.  
Questions preceded by an asterisk (\*) are "required."

#### Risks and Benefits

There are no known risks from your participation. There is no cost to you except for your time and there is no compensation beyond the knowledge that you have helped the East Bay Coalition for the Homeless.

Of course, all responses are confidential and anonymous. No individual responses will be reported; only grouped and aggregated data will be disseminated. Neither will we disclose any information that might reveal any individual's identity. The survey is hosted on a secure server and only the researchers who created it will have access to the survey data.

#### Contact Information

You can obtain further information from the principal investigators, [Professor Kathy Micken](#) and the Fall 2012 Marketing Research class. If you have questions concerning your rights as a research subject, you may call the Roger Williams University Human Subjects Review Board administrator at 401-254-3664.

The "Forward button" (>>) below will take you to the first page of the survey.  
Clicking the button indicates that you have read this form and that you consent to participate in the survey.

**This first question is a SCREENING QUESTION and will send respondents to the appropriate part of the survey.**

S1 \* I am a current or former member of the Board for the \_\_\_\_\_.

- East Bay Coalition for the Homeless (EBCH) If you are a member of both boards, please select this first option.  
**Respondents selecting this first option see S2 below and then questions for the EBCH Board (EBCH1 – EBCH13) beginning on Page 68**
- East Bay Community Action Program (EBCAP) **Respondents selecting this option see S2 below and then are taken to Question ALL1 beginning on Page 70.**

S2 How long have you been a Board member?

If you are a former Board member, how long were you a member of the Board?

- Less than a year
- 1 - 3 years
- 4 - 6 years
- More than 6 years)

**THESE ARE QUESTIONS FOR EBCH BOARD MEMBERS (EBCH1 – EBCH8)**

**These first questions ask about your role as a current or former EBCH Board member.**

**No individual information will be reported.**

**Your individual responses will only be available to the class.**

EBCH1 To what extent does your employer encourage your involvement in the EBCH?

- ☐ 1 My employer does not encourage my involvement
- ☐ 2
- ☐ 3
- ☐ 4
- ☐ 5
- ☐ 6
- ☐ 7 My employer does encourage my involvement 7

EBCH2 If you were not on the EBCH Board how likely would you be to advocate on behalf of the EBCH?

- ☐ Very Unlikely
- ☐ Unlikely
- ☐ Somewhat Unlikely
- ☐ Neither Unlikely nor Likely
- ☐ Somewhat Likely
- ☐ Likely
- ☐ Very Likely

EBCH3 How likely are you to encourage a friend to participate in the EBCH's programs?

- ☐ Very Unlikely
- ☐ Unlikely
- ☐ Undecided
- ☐ Likely
- ☐ Very Likely

EBCH4 Are you involved in fundraising activities for an organization other than the EBCH?

- ☐ No
- ☐ Yes; Please specify which one(s) \_\_\_\_\_

EBCH5 Please describe your role as an EBCH Board member: duties, responsibilities, etc.

EBCH6 Are there any aspects of your role as an EBCH Board Member that you wish (or wished) were different?

EBCH7 These questions ask about the Board's role in planning and implementing fundraising events.

	0 Events	1 Event	2 Events	3 Events	4 Events	5 Events	More than 5 Events
How many fundraising events should the EBCH hold each year – whether or not the Board is involved?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
How many events should EBCH Board Members plan and implement each year?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
How many events should an individual Board Member attend each year?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

EBCH8 How well do you feel that you have fulfilled (or did fulfill) your responsibilities as an EBCH Board member?

- ☐ 1 I've not been able to fulfill my responsibilities
- ☐ 2
- ☐ 3
- ☐ 4 I have fulfilled my responsibilities
- ☐ 5
- ☐ 6
- ☐ 7 I've fulfilled more than my share of responsibilities

### ALL RESPONDENTS SEE THE REMAINING QUESTIONS

The next questions address how established the EBCH is in the community.

No individual information will be reported.

Your individual responses will only be available to the class.

ALL1 How are EBCH board members perceived among residents of the East Bay?

ALL2 Do people in your network (social and business acquaintances) know that you are (or were) an EBCH / EBCAP Board Member?

- ☐ 1 Only a few people in my network know I am a Board Member
- ☐ 2
- ☐ 3
- ☐ 4
- ☐ 5
- ☐ 6
- ☐ 7 Almost everyone in my network knows I am a Board Member

ALL3 How often are you able to speak with other people about the EBCH?

	Never	Rarely	Sometimes	Often	Very Often
Community Members	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Current Donors	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Potential Donors	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Others; Please Specify	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

**The following questions ask about the EBCH's image and the East Bay community's overall awareness of the EBCH.**

**No individual information will be reported.**

**Your individual responses will only be available to the class.**

ALL4 What percentage of people in the East Bay do you think are aware of the EBCH's programs?

- ☐ I don't know
- ☐ 0%
- ☐ 10%
- ☐ 20%
- ☐ 30%
- ☐ 40%
- ☐ 50%
- ☐ 60%
- ☐ 70%
- ☐ 80%
- ☐ 90%
- ☐ 100%

ALL5 If you were asked to describe the EBCH, what strengths, if any, would come to mind? There are spaces for up to three responses. If none comes to mind, please type "None" in the first text box.

Strength 1

Strength 2

Strength 3

ALL6 If you were asked to describe the EBCH, what weaknesses, if any, would come to mind? There are spaces for up to three responses. If none comes to mind, please type "None" in the first text box.

Weakness 1

Weakness 2

Weakness 3

ALL7 If the EBCH did not exist, what would be the impact on the East Bay Community?

ALL8 What makes the EBCH different from other organizations that help the homeless?



ALL9 \* Listed below are four potential messages that the EBCH might use to tell its story in order to attract potential donors.

Rank the messages from 1 to 4, with “1” being the most effective message and “4” being the least effective message.

Type the rank (1, 2, 3, or 4) in the box next to each message.

No two messages can have the same rank.

**Presentation of these messages was rotated.**

\_\_\_\_\_ Forty percent of the homeless are families. Help the East Bay Coalition for the Homeless provide affordable and safe transitional housing while these families get back on their feet.

\_\_\_\_\_ Homelessness does not discriminate. It doesn’t matter if you are well-educated, have a beautiful family, or have fought for our country. The East Bay Coalition for the Homeless helps people thrive in society through transitional housing, a work requirement, and skills training. Homelessness can happen to anyone, and the EBCH has been able to make a difference in the lives of hundreds of Rhode Islanders. But we cannot do it alone; we need your help to make this difference, too.

\_\_\_\_\_ Homelessness can happen to anyone; homelessness does not discriminate. It can happen to families just like yours: fathers and mothers, uncles and aunts, sons and daughters. The East Bay Coalition for the Homeless reaches out to people in need and offers them a helping hand. The EBCH has made a difference in the lives of hundreds of East Bay families, but we cannot do it alone. We need your help to continue making a difference in our community.

\_\_\_\_\_ It’s your neighbor whose husband has cancer. It’s your co-worker who lost her job in a bad economy. It’s the soldier who lost his arm and can no longer work. Homelessness can happen to them, and it can happen to you. The East Bay Coalition for the Homeless has a track record of keeping families off the streets and helping them overcome life’s challenges.

ALL10 Comments about the messages above.

ALL11 Are there other messages that would be more effective?

ALL12 In your experience, what are the most effective media outlets for communicating with potential donors?  
Check all that apply.

**Presentation of items (other than the last one) was rotated.**

- ☐ Newspaper
- ☐ Newsletter - Paper
- ☐ Newsletter - Electronic
- ☐ Website
- ☐ Billboards
- ☐ RIPTA Bus Signs
- ☐ Television
- ☐ Radio
- ☐ Social Media (i.e., Facebook, Twitter) (
- ☐ Blog
- ☐ Email
- ☐ Special Events
- ☐ Other; Please tell us more \_\_\_\_\_

**The next questions ask about EBCH fundraising.**  
**No individual information will be reported.**  
**Your individual responses will only be available to the class.**

ALL13 How might the EBCH reach out to high profile individuals within the Rhode Island charitable community?

ALL14 How effective is each of these EBCH fundraising activities/events at increasing donations?

**Presentation of items was rotated.**

	Very Ineffective	Ineffective	Somewhat Ineffective	Neither Effective nor Ineffective	Somewhat Effective	Effective	Very Effective
Bike-a-thon	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Welcome Home Annual Dinner & Auction	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Brick Campaign	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Annual Appeal	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Soccer Shootout	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Silpada Jewelry Sale	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

ALL15 Having the EBCH under the umbrella of the EBCAP helps the EBCH's fundraising efforts.

- ☐ Strongly Disagree
- ☐ Disagree
- ☐ Somewhat Disagree
- ☐ Neither Agree nor Disagree
- ☐ Somewhat Agree
- ☐ Agree
- ☐ Strongly Agree

ALL16 In what ways does the relationship between the EBCH and EBCAP help or hinder the EBCH's fundraising efforts?

**All respondents see these Classification Questions**

**These last questions are asked solely for classification purposes.**

**Your individual responses will only be available to the class.**

**No individual information will be reported. All your responses are anonymous and confidential.**

CL1 \* How strongly do you agree or disagree with each of the following statements?

	Strongly Disagree	Disagree	Neither Agree nor Disagree	Agree	Strongly Agree
People look to me for advice	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I am involved in the community	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I am well known in the community	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

CL2 \* Are you ...

- ☐ Male
- ☐ Female

CL3 If there is anything else you would like to tell us, here's the place.

# Appendix B

December 13, 2012, EBCH Board Presentation Slides

## Here's What You Asked Us For

- To determine the public opinion of the EBCH
- To develop a market attraction/branding study
- To prepare a plan to Increase visibility which will lead to increased funding

## Here's How We Went About It

- Research
- Board Survey
  - » Analyzed results
- Donor Survey (Spring)
- Community Survey (Spring)

## Objectives

1. Identify the organization's current image.
2. Identify alternative images that might better convey the EBCH's story.
3. Identify how best to communicate the image.
4. Assess current fundraising efforts.

## Survey Development

- Initial Consultation: Diane and Amanda, and a former EBCH board member
- Reviewed similar surveys from other not-for-profit organizations
- Developed a pool of questions
- Refined the pool to a set of 29 questions
- Pilot tested the survey
- Designed for 10 minutes, but most respondents took 30 minutes

## Results

### Two Topics

1. The Board’s role in fundraising and donor acquisition.
2. How to brand and promote the EBCH.

### People in your networks know you are EBCH board members

Only a few people  
know I am a  
Board member

1

2

3

4

5

6

7

Almost everyone  
knows I am a  
Board member

### You are likely to encourage a friend to participate in EBCH programs

Very unlikely  
to encourage

1

2

3

4

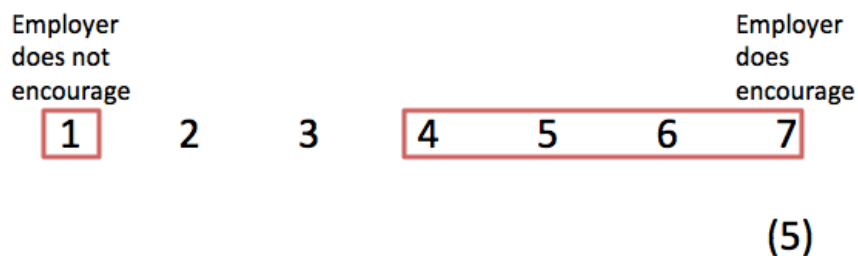
5

Very likely  
to encourage

You would continue to advocate for the EBCH



Your employers mostly encourage your EBCH involvement



## How often you speak with other people about the EBCH

	Never			Very Often	
Community Members	1	2	3	4	5
Current Donors	1	2	3	4	5
Potential Donors	1	2	3	4	5
Others (Family/Friends)	1	2	3	4	5

## Barriers to speaking with other people about the EBCH

- Job-relevant restrictions
- Not comfortable making cold calls
- Need for supporting materials



How many events per year...

Should the EBCH hold  
w/ or w/o Board  
involvement

0 1 2 3 4 5 >5  
↑

Should the EBCH  
Board plan

0 1 2 3 4 5 >5

Should an EBCH Board  
member attend

0 1 2 3 4 5 >5  
↑

You aren't sure whether the EBCAP affiliation helps EBCH fundraising efforts

	Strongly Disagree					Strongly Agree	
EBCH Board members	1	2	<span style="border: 1px solid red; padding: 2px;">3 4</span>		5	<span style="border: 1px solid red; padding: 2px;">6 7</span>	
			↑				
EBCAP Board members	1	2	<span style="border: 1px solid red; padding: 2px;">3 4 5 6 7</span>				

#### EBCH Board Comments

Work around EBCAP  
Overlap of donor lists

#### EBCAP Board Comments

Overlap of donor lists  
Larger budget can provide help  
Unaware of relationship

## Which fundraising activities increase donations?

	Very Ineffective					Very Effective		
Welcome Home Dinner	1	2	3	4	5	6	7	
Bike-a-thon	1	2	3	4	5	6	7	
Annual Appeal	1	2	3	4	5	6	7	
Silpada Jewelry Sale	1	2	3	4	5	6	7	
Brick Campaign	1	2	3	4	5	6	7	
Soccer Shoot Out	1	2	3	4	5	6	7	

## EBCH Strengths & Weaknesses

### Strengths

Passion  
 Commitment  
 Dedication  
 Support for East Bay community

### Weaknesses

Awareness  
 Branding  
 Publicity  
 Fundraising/  
 Outreach

## Differentiating Characteristics

- Provides homes (L-T) not shelters (S-T)
- Family Independence
- Hand-up not a hand-out
- Transitional housing

## Messages



- Homelessness does not discriminate; it can happen to anyone
- EBCH cannot work alone and needs the community's help
- EBCH offers a hand-up not a hand-out
- EBCH provides transitional assistance to break the homeless cycle
- EBCH help comes with a work requirement
- EBCH provides mentoring program so that families learn how to be successful

## Where We Go From Here

We have created two other surveys to target the community of the East Bay, as well both current and former donors.

## Next Semester

- Written marketing strategy
- Sample promotional material
- Re-designed website
- Social media strategy

# Appendix C

## Spring 2013 Research Results Slides

### Research Objectives

1. Identify the EBCH's current image
2. Test alternative images
3. Identify how best to communicate the image
  - » Media
  - » Positioning
4. Assess current fundraising efforts

### Background

Fall survey of EBCH & EBCAP Boards  
Research into charitable giving attitudes  
Research into charitable giving motivations

### Sample Frame

EBCAP Newsletter Recipients email list

- » Current Donors to the EBCH
- » Former Donors to the EBCH
- » Non-donors to the EBCH

### In the field for 2 weeks

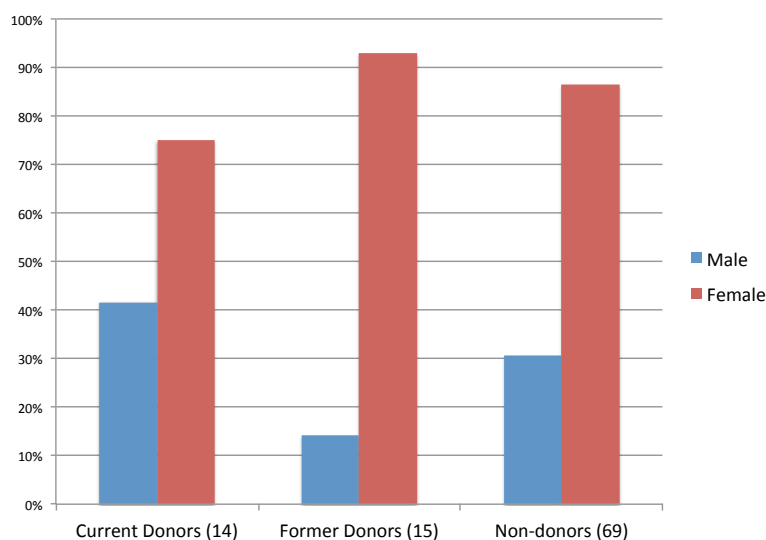
105 usable surveys \*

- » 15 Current Donors
- » 15 Former Donors
- » 75 Non-donors

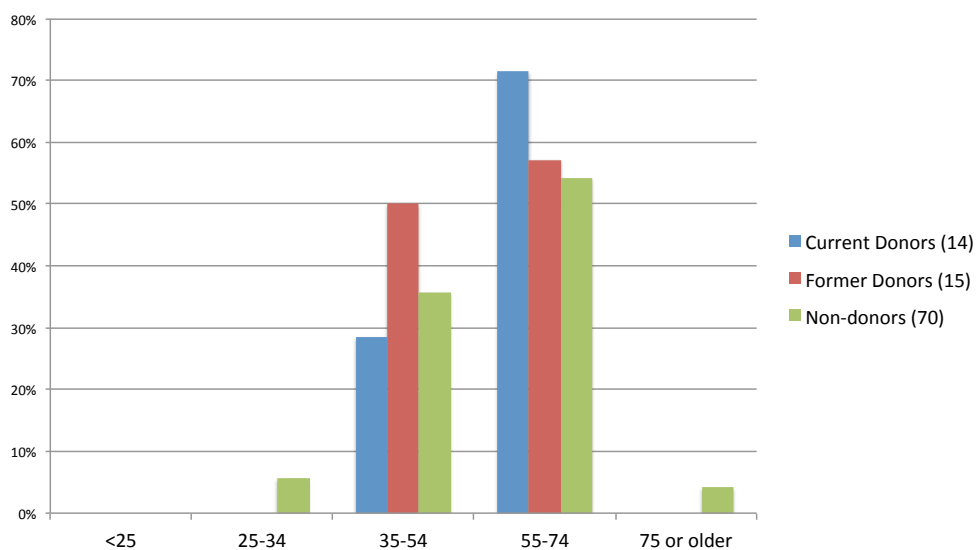
\* Not every respondent answered all questions

## Who Responded?

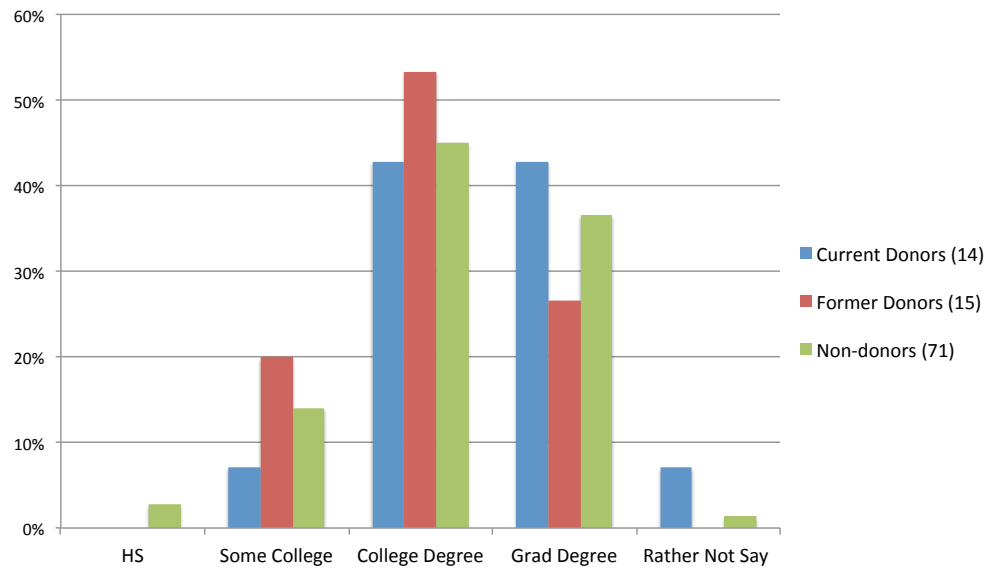
### Gender



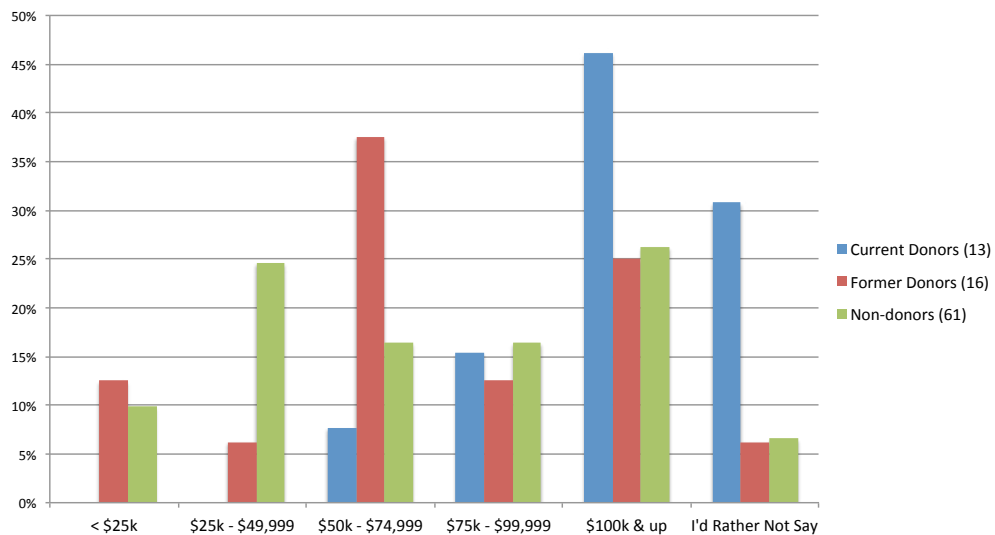
### Age



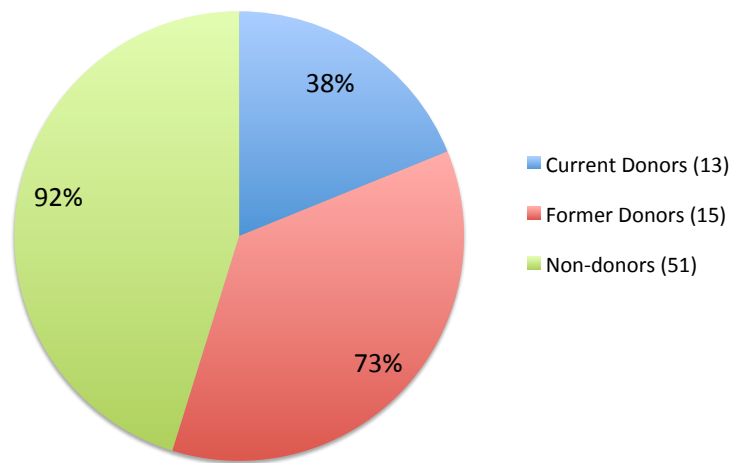
## Education



## Income

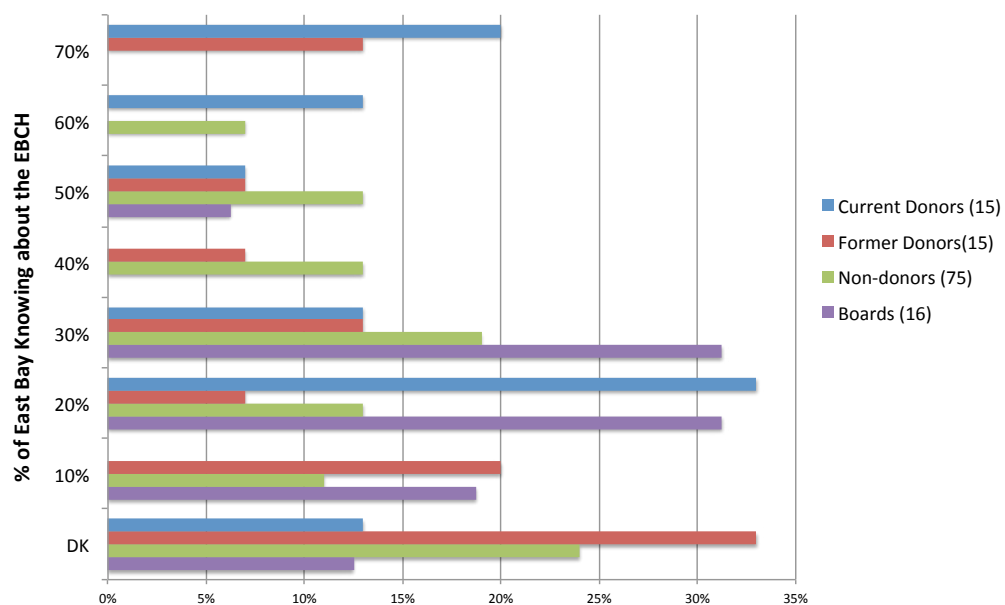


## Affected by Homelessness



## EBCH Awareness

### East Bay Knowledge of EBCH





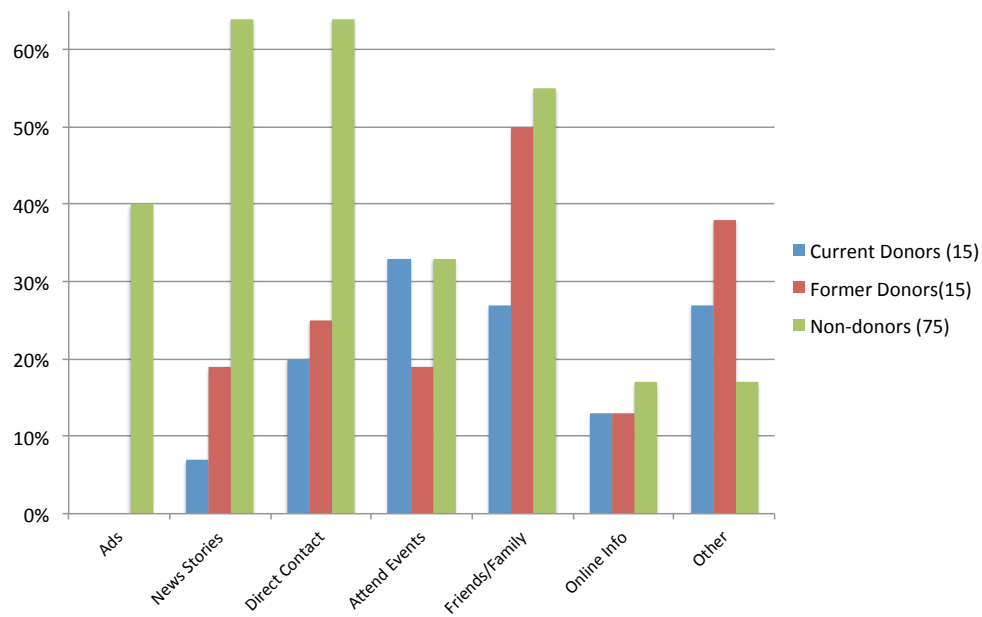
## Familiarity w/ Other Organizations (Non-donors; n=74)

	I Know Something about this Organization	# Responses
Crossroads RI	93%	74
Amos House	74%	35
RI Housing Resources Commission	74%	29
Rhode Island Coalition for the Homeless	73%	26
EBCH	65%	74
Providence Center	56%	25
Advent House	55%	31
Statewide Housing Action Coalition	43%	21
Nickerson House	33%	30
Housing Network for RI	24%	34
W.A.R.M. Shelter	24%	29
People to End Homelessness	17%	36

Each respondent saw a set of six organizations: Crossroads RI, EBCH + four others selected randomly from among the rest

## Information Sources

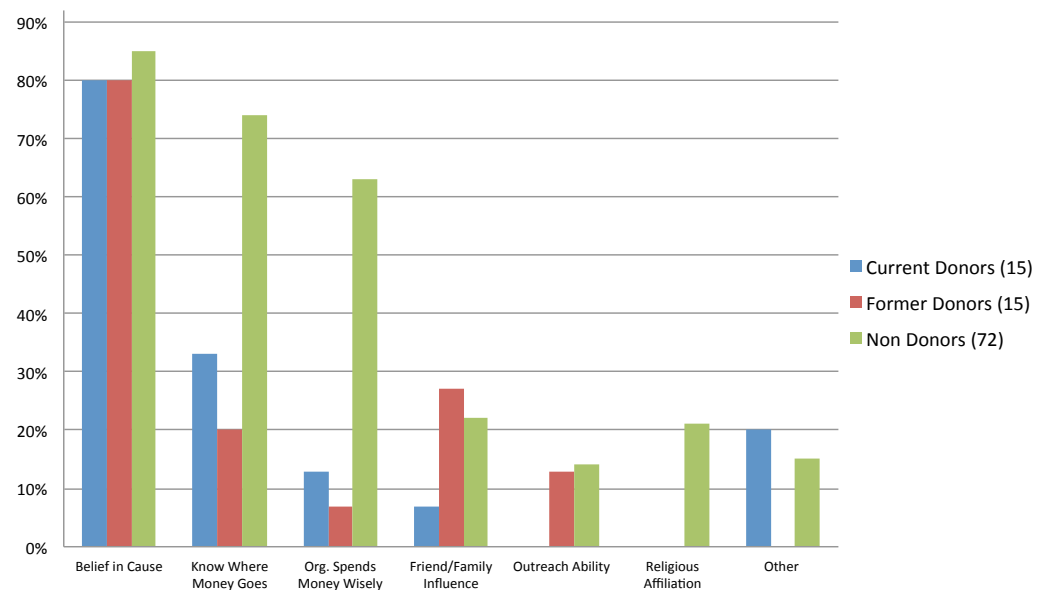
CD & FD: How you first heard about the EBCH; ND: How you learn about charities



Other: Community Involvement; Work

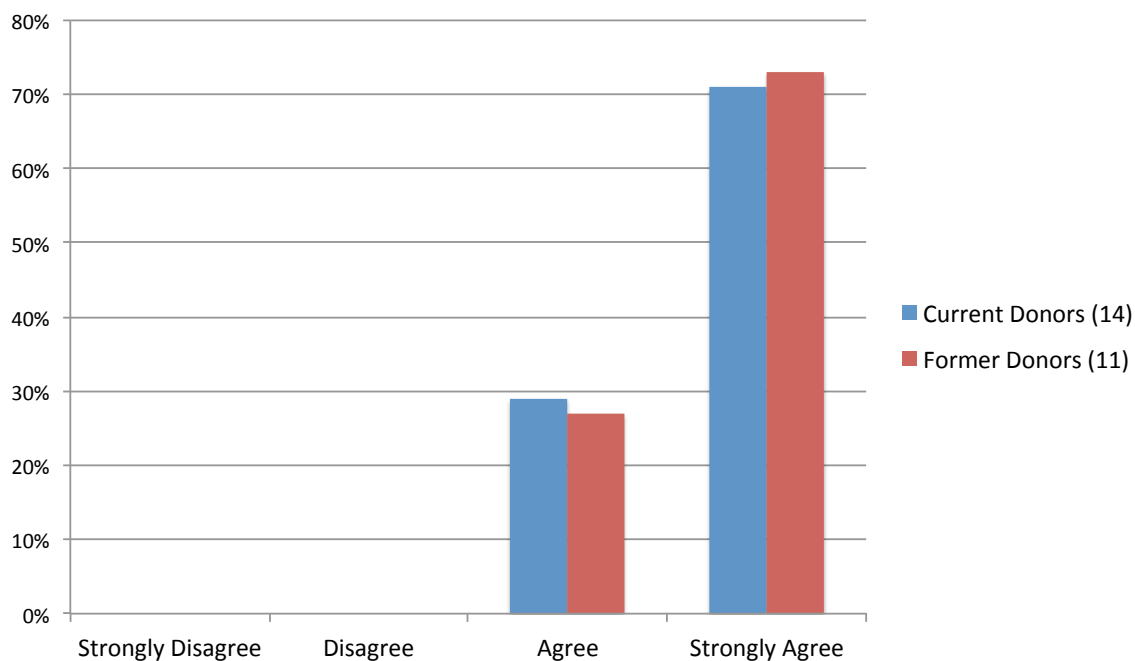
## Donations: EBCH and Others

### Reasons for Donating

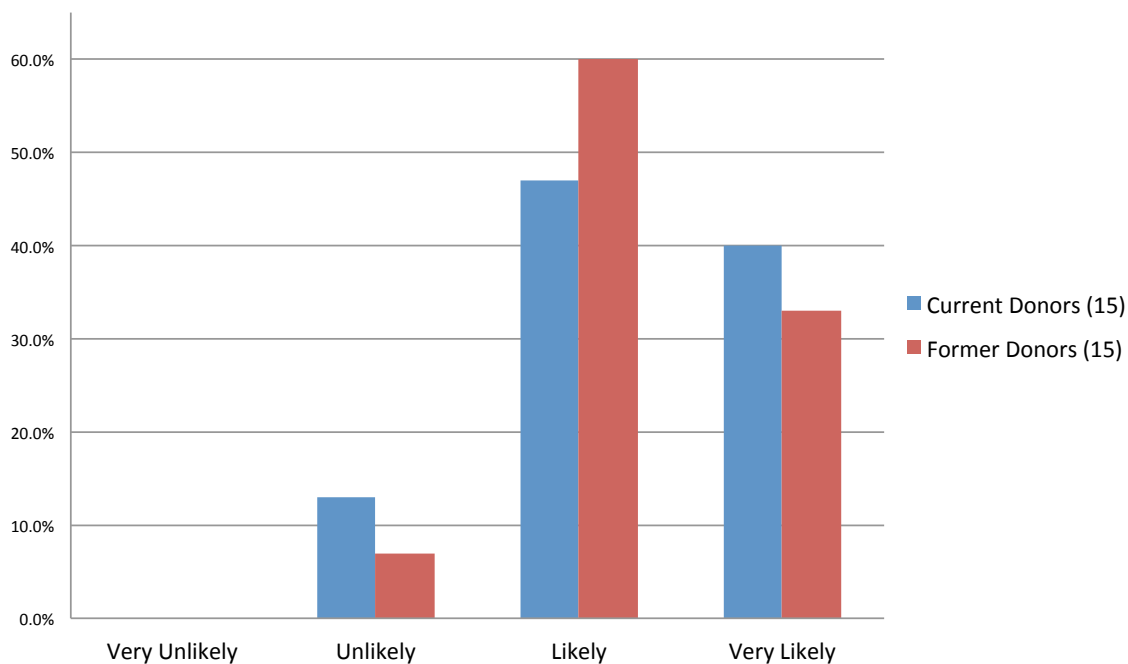


Current & Former Donors asked reasons for giving to EBCH; Non-donors asked reasons for giving to a charity. Thus, “religious affiliation” was not an option for Current or Former EBCH donors.

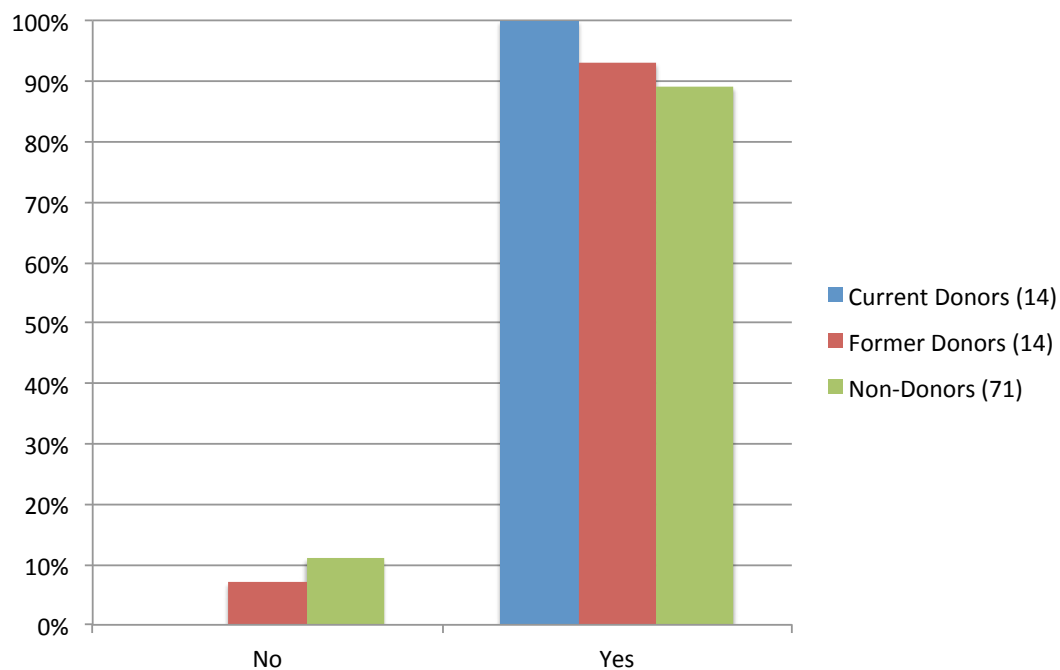
## Believe EBCH Donation Put to Good Use



## Encourage a friend to donate to the EBCH



## Donate to other charities



## Donations to Other Charities

### Current Donors

EBCAP  
Crossroads RI  
Amos House  
Food Bank  
Child-Focused Charities  
Community-Focused Groups  
Religious Organizations

### Former Donors

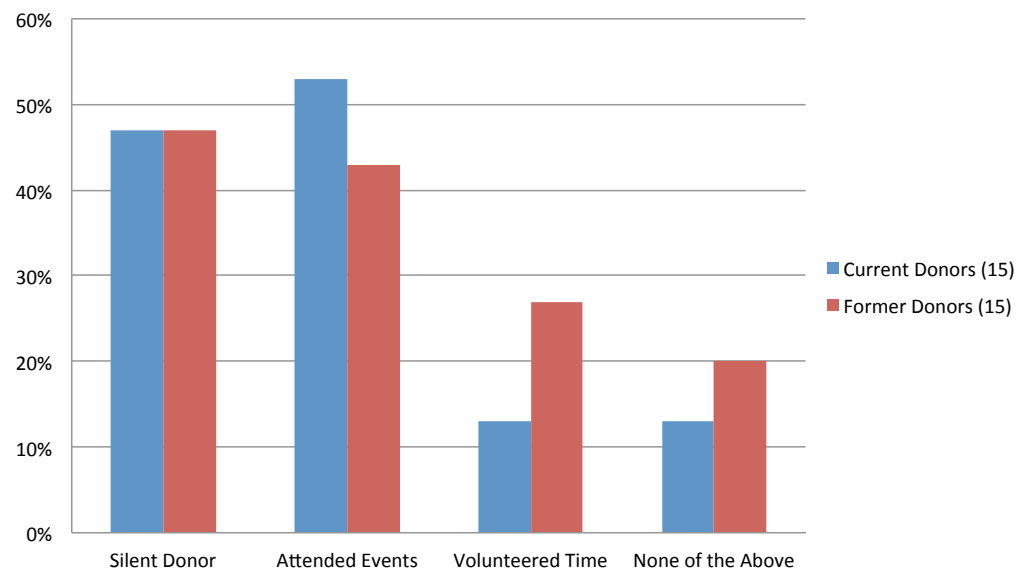
EBCAP  
Crossroads RI  
Amos House  
Food Bank  
Child-Focused Charities  
Medical/Disease-Focused Orgs  
Religious Organizations

### Non-Donors

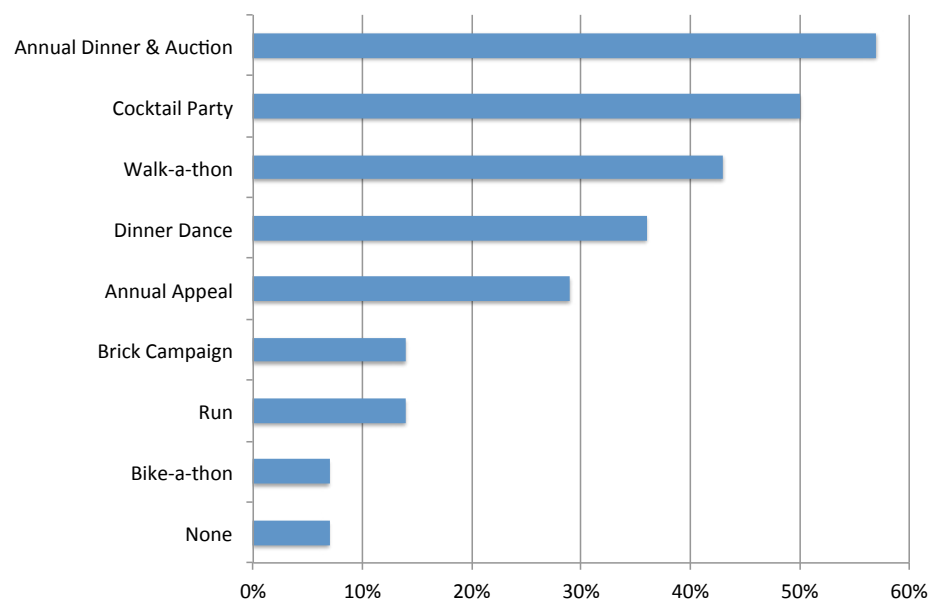
EBCAP  
Crossroads RI  
RI Coalition for the Homeless  
Food Bank  
Child Focused Charities  
Medical/Disease Focused  
Groups  
Religious Organizations

## EBCH Fundraising

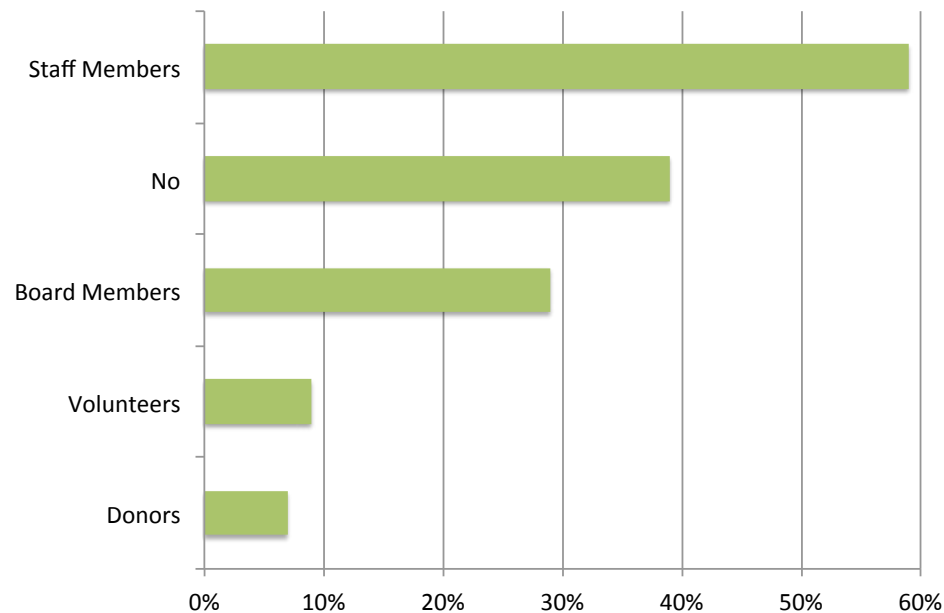
### How Involved in EBCH



### Fundraising Events of Interest (Current Donors; n=14)



## Know Anyone Associated with the EBCH? (Non Donors; n=75)



## Why No Longer Donate to the EBCH? (Former Donors; n=12)

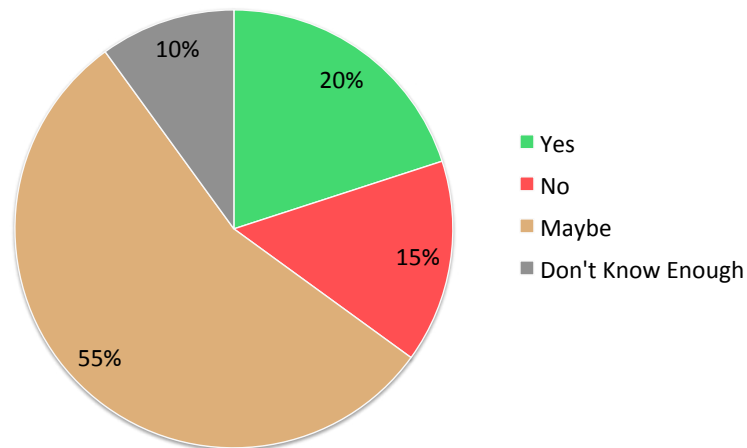
Reason	#
Other organizations needed the donation more	4
Became involved in other organizations	5
Could no longer afford to donate	4
Not a conscious decision; probably will donate in the future	3
I rotate my donations	2

Two additional options were provided but not selected by anyone:

I was unhappy with the organization.

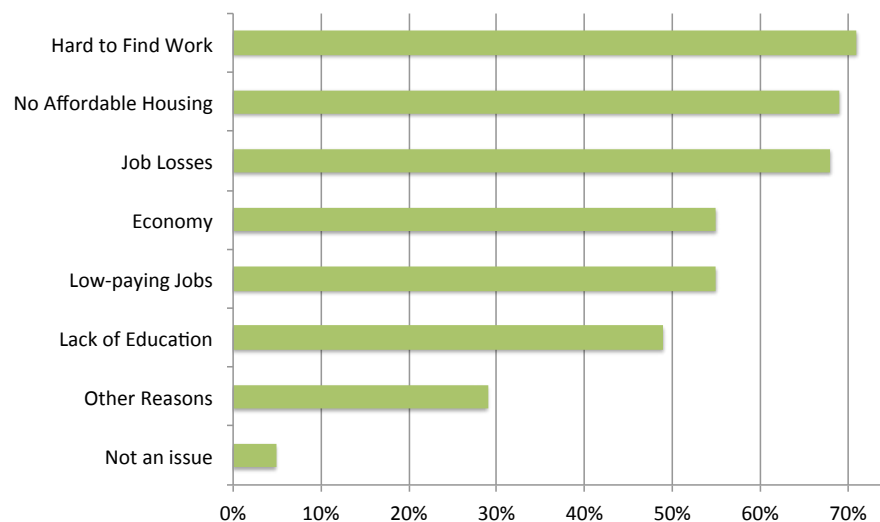
I did not believe my money was put to good use.

## Consider Donating to the EBCH? (Non Donors; n=71)



## Potential Messaging

### Reasons for Homelessness (Non Donors; n=75)



Other: Medical/Mental Illness; Substance Abuse

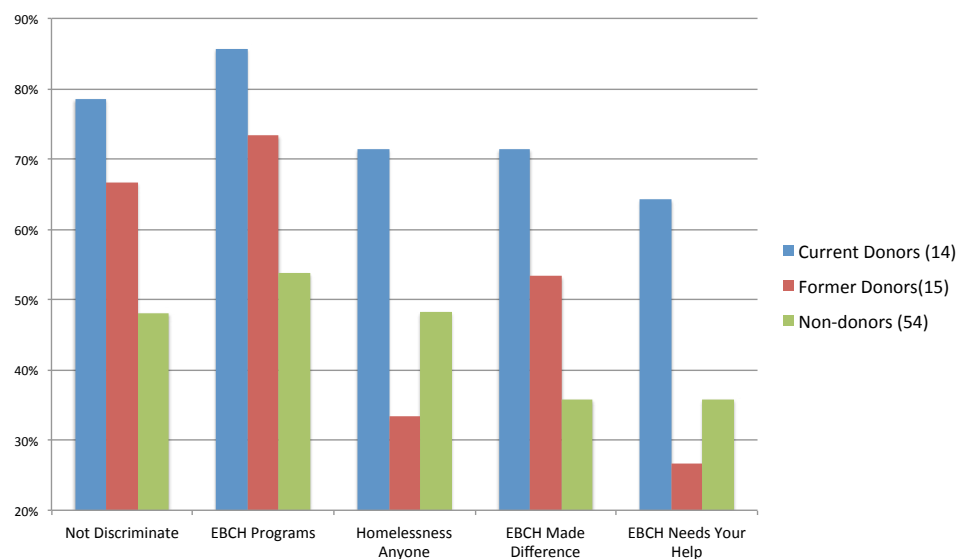


## Message Effectiveness

Tested five revised versions of the messages that emerged from the fall 2012 survey of the EBCH and EBCAP boards.

- Homeless does not discriminate. It does not matter how old you are, if you are well-educated, or have fought for our country.
- The East Bay Coalition for the Homeless helps people thrive in society through transitional housing, a work requirement, and skills training.
- Homelessness can happen to anyone.
- The EBCH has made a difference in the lives of hundreds of Rhode Islanders.
- The EBCH cannot do its work alone; we need your help to make this difference, too.

## Message Effectiveness (% "Effective" or "Very Effective")



# Appendix D

## Spring 2013 Survey



east bay community action program  
THE BRIDGE TO SELF-RELIANCE

## Welcome to the EBCAP/EBCH Survey!



east bay coalition for the homeless

### About This Survey

You are invited to participate in a survey about the EBCAP's housing program, the East Bay Coalition for the Homeless (EBCH). We are asking for your thoughts and perspectives because you currently receive the EBCAP newsletter or have been associated with the EBCAP or the EBCH in some way.

The EBCH is working with students at Roger Williams University to assess the organization's image. Your input will help us develop future programs to increase awareness of the EBCH's programs as well as expand the EBCH's outreach in the community.

Your responses are important to a successful outcome.

Your participation will involve completing this short survey which should take about 6 minutes. You may choose not to answer some or all of the questions, other than those marked with an asterisk. You may leave the survey at any time before completing it. Your name will not appear on your completed survey and no identifying information is being collected.

You can start the survey, pause and return later to finish, if you wish.  
Questions preceded by an asterisk (\*) are "required."

### Risks and Benefits

There are no known risks from your participation. There is no cost to you and there is no compensation beyond the knowledge that you have helped the East Bay Coalition for the Homeless. Participation will not result in your receiving solicitations from EBCAP or the EBCH other than those you may have already authorized.

Of course, all responses are confidential and anonymous. No individual responses will be reported; only grouped and aggregated data will be disseminated. We will not disclose any information that might reveal any individual's identity. The survey is hosted on a secure server and only the researchers who created it have access to the survey data.

### Contact Information

You can obtain further information from the principal investigators, [Professor Kathy Micken](#) and the Spring 2013 Marketing Special Topics class. If you have questions concerning your rights as a research subject, you may call the Roger Williams University Human Subjects Review Board administrator at 401-254-3369.

The "Forward button" (>>) below will take you to the first page of the survey.

Clicking the button indicates that you have read this form, that you are 18 years of age or older, and that you consent to participate in the survey.

This first question is a SCREENING QUESTION and will send respondents to the appropriate part of the survey.

S1 Are you a current or former donor to the East Bay Coalition for the Homeless?

- No Respondents selecting this first option are taken to questions for non-donors (CM1 – CM13) beginning on Page 107.
- Yes Respondents selecting this option see S2 below.

S2 I am a ...

- Current Donor (since January 1, 2012) Respondents selecting this option are taken to questions for Current Donors (CD1 – CD13) beginning on Page 103.
- Former Donor (prior to January 1, 2012) Respondents selecting this option are taken to questions for Former Donors (FD1 – FD10) beginning on Page 99.

THESE ARE QUESTIONS FOR **FORMER DONORS** (FD1 – FD10)

In general, when several options are presented, the order of the items is rotated (other than the last one or last two, depending on the list).

FD1 How did you originally hear about the EBCH?

Check all that apply

- ☐ Advertisements (for example, TV, newspapers, magazines, billboards, etc.)
- ☐ News stories
- ☐ Direct contact from the EBCH via mail or email
- ☐ Attending events
- ☐ Friends, family or colleagues
- ☐ Information online
- ☐ Other \_\_\_\_\_
- ☐ I don't remember

FD2 What motivated you to donate to the EBCH? Check all that apply.

- ☐ Belief in the organization's cause
- ☐ Popularity
- ☐ Outreach ability
- ☐ Friends or family influence
- ☐ The organization spends its money wisely
- ☐ I know where my money goes when I give to this organization
- ☐ Other \_\_\_\_\_

FD3 How involved were you with the EBCH? Check all that apply.

- ☐ I was a silent donor
- ☐ I attended events
- ☐ I volunteered my time
- ☐ None of the above

FD4 I believed my donation to the EBCH was put to good use.

- ☐ Strongly Disagree
- ☐ Disagree
- ☐ Agree
- ☐ Strongly Agree
- ☐ I don't know what my donation was used for

FD5 How likely are you to encourage a friend to donate to the EBCH (including participating in EBCH-sponsored events)?

- ☐ Very Unlikely
- ☐ Unlikely
- ☐ Likely
- ☐ Very Likely

FD6 What percentage of people in the East Bay do you think are aware of the EBCH's services?

- ☐ I don't know
- ☐ 0%
- ☐ 10%
- ☐ 20%
- ☐ 30%
- ☐ 40%
- ☐ 50%
- ☐ 60%
- ☐ 70%
- ☐ 80%
- ☐ 90%
- ☐ 100%

FD7 How effective is each of the following for conveying the EBCH message to potential donors?

	Very Ineffective	Ineffective	Somewhat Ineffective	Neither	Somewhat Effective	Effective	Very Effective
Homelessness does not discriminate. It does not matter how old you are, whether you are well-educated, or have fought for our country.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The East Bay Coalition for the Homeless helps people thrive in society through transitional housing, a work requirement, and skills training.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Homelessness can happen to anyone.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The EBCH has made a difference in the lives of hundreds of Rhode Islanders.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The EBCH cannot do its work alone; we need your help to make this difference, too.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

FD8 Is there a more effective way to convey the EBCH message to potential donors?

FD9 Why do you no longer donate to the EBCH? Please answer at your comfort level.  
Please check all that apply.

- ☐ There were other organizations I felt needed the donation more
- ☐ I became involved in other organizations
- ☐ I did not believe my money was put to good use
- ☐ I could no longer afford to donate
- ☐ I was unhappy with the organization (Please explain) \_\_\_\_\_
- ☐ Other \_\_\_\_\_

FD10 Do you currently donate to any other charitable organizations?

- ☐ No (1)
- ☐ Yes; Please list them here (2) \_\_\_\_\_

Former Donor respondents would next see the final Classification Questions (CL1 – CL9) beginning on page 113.

THESE ARE QUESTIONS FOR **CURRENT DONORS** (FD1 – FD10)

In general, when several options are presented, the order of the items is rotated (other than the last one or last two, depending on the list).

CD1 How did you originally hear about EBCH?

Check all that apply

- ☐ Advertisements ( for example, TV, newspapers, magazines, billboards, etc.)
- ☐ News stories
- ☐ Direct contact from the EBCH through mail or email
- ☐ Attending events
- ☐ Friends, family or colleagues
- ☐ Information online
- ☐ Other \_\_\_\_\_
- ☐ I don't remember

CD2 What motivates you to donate to the EBCH?

Check all that apply.

- ☐ Belief in the organization's cause
- ☐ Popularity
- ☐ Outreach ability
- ☐ Friends or family influence
- ☐ The organization spends its money wisely
- ☐ I know where my money goes when I give to this organization
- ☐ Other \_\_\_\_\_

CD3 How involved are you in the EBCH? Check all that apply.

- ☐ I am silent donor
- ☐ I attend events
- ☐ I volunteer my time
- ☐ None of the above

CD4 I believe my donation is put to good use.

- ☐ Strongly Disagree
- ☐ Disagree
- ☐ Agree
- ☐ Strongly Agree
- ☐ I don't know what my donation is used for



CD5 How likely are you to encourage a friend to donate to the EBCH (including participating in sponsored events)?

- ☐ Very Unlikely
- ☐ Unlikely
- ☐ Likely
- ☐ Very Likely

CD6 Do people in your network (social and business acquaintances) know that you donate to the EBCH?

- ☐ Only a few people in my network know that I donate - 1
- ☐ 2
- ☐ 3
- ☐ 4
- ☐ 5
- ☐ 6
- ☐ Almost everyone in my network knows that I donate - 7

CD7 What percentage of people in the East Bay do you think are aware of the EBCH's services?

- ☐ I don't know
- ☐ 0%
- ☐ 10%
- ☐ 20%
- ☐ 30%
- ☐ 40%
- ☐ 50%
- ☐ 60%
- ☐ 70%
- ☐ 80%
- ☐ 90%
- ☐ 100%

CD8 How effective is each of the following for conveying the EBCH message to potential donors?

	Very Ineffective	Ineffective	Somewhat Ineffective	Neither	Somewhat Effective	Effective	Very Effective
Homelessness does not discriminate. It does not matter how old you are, whether you are well-educated, or have fought for our country.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The East Bay Coalition for the Homeless helps people thrive in society through transitional housing, a work requirement, and skills training.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Homelessness can happen to anyone.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The EBCH has made a difference in the lives of hundreds of Rhode Islanders.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The EBCH cannot do its work alone; we need your help to make this difference, too.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

CD9 Is there a more effective way to convey the EBCH message to potential donors?

CD10 Which of these fundraising events, if any, would you be interested in attending? Check all that apply.

- ☐ • Bike-a-thon
- ☐ • Walk-a-thon
- ☐ • Run
- ☐ • Annual Dinner & Auction
- ☐ • Buy a Brick Campaign
- ☐ • Annual Appeal
- ☐ • Dinner Dance Event
- ☐ • Cocktail Party
- ☐ • None of the above

CD11 Are there any other events you would like to see implemented?

CD12 What is your preferred method of receiving information about the EBCH?  
Check all that apply.

- ☐ Newsletter - paper
- ☐ Newsletter - electronic
- ☐ Website
- ☐ Social Media (i.e., Facebook, Twitter)
- ☐ Email
- ☐ Attending special events
- ☐ Other \_\_\_\_\_

CD13 Do you currently donate to any other charitable organizations?

- ☐ No
- ☐ Yes; Please list them here \_\_\_\_\_

Current Donor respondents would next see the final Classification Questions (CL1 – CL9) beginning on page 113.

THESE ARE QUESTIONS FOR NON-DONORS/COMMUNITY MEMBERS (CM1 – CM13)

In general, when several options are presented, the order of the items is rotated (other than the last one or last two, depending on the list).

CM1 What are the main causes of homelessness in your community?  
Check all that apply.

- ☐ Job Losses/People Being Laid Off
- ☐ Low-paying Jobs
- ☐ The Economy
- ☐ Lack of Education
- ☐ Difficulty Finding Work
- ☐ Lack of Affordable Housing
- ☐ Other \_\_\_\_\_
- ☐ Homelessness is not an issue in my community

CM2 What word or phrase comes to mind when you think of those who are homeless?

CM3 How important an issue is homelessness within Rhode Island?

- ☐ Not an Important Issue - 1
- ☐ 2
- ☐ 3
- ☐ 4
- ☐ 5
- ☐ 6
- ☐ A Very Important Issue - 7

CM4 What percentage of people in the East Bay do you think are aware of the EBCH's services?

- ☐ I don't know
- ☐ 0%
- ☐ 10%
- ☐ 20%
- ☐ 30%
- ☐ 40%
- ☐ 50%
- ☐ 60%
- ☐ 70%
- ☐ 80%
- ☐ 90%
- ☐ 100%

CM5 Do you know any people associated with the EBCH? Check all that apply.

- ☐ No
- ☐ Board member(s)
- ☐ Staff member(s)
- ☐ Volunteer(s)
- ☐ Donor(s)

CM6 How do you usually learn about charitable organizations?

- ☐ Advertisements (for example, TV, newspaper, magazines, billboards, etc.)
- ☐ News Stories
- ☐ Direct contact from the organization via mail or email
- ☐ Attending events
- ☐ Friends, family, and colleagues
- ☐ Information online
- ☐ Other \_\_\_\_\_

## CM7 How familiar you are with these organizations?

For this question, each respondent was presented with both the East Bay Coalition for the Homeless and Crossroads RI plus four additional organizations, selected at random.

If a respondent selected “I know something about this organization,” for at least one of the organizations s/he saw, then the respondent was taken to the next question (**CM8** on the next page).

If a respondent had not heard about any of the organizations, then the respondent was taken to **CM9** on Page 111.

	I have not heard of this organization Or I know very little about this organization	I know something about this organization
East Bay Coalition for the Homeless	<input type="radio"/>	<input type="radio"/>
Crossroads RI	<input type="radio"/>	<input type="radio"/>
RI Coalition for the Homeless	<input type="radio"/>	<input type="radio"/>
RI Housing Resources Commission	<input type="radio"/>	<input type="radio"/>
Statewide Housing Action Coalition	<input type="radio"/>	<input type="radio"/>
Housing Network for Rhode Island	<input type="radio"/>	<input type="radio"/>
Advent House	<input type="radio"/>	<input type="radio"/>
Amos House	<input type="radio"/>	<input type="radio"/>
Nickerson House Gateway to Independence	<input type="radio"/>	<input type="radio"/>
People to End Homelessness	<input type="radio"/>	<input type="radio"/>
Providence Center	<input type="radio"/>	<input type="radio"/>
W. A. R. M. Shelter	<input type="radio"/>	<input type="radio"/>

CM8 How likely might you be to donate to these organizations?

For this question, respondents saw only the names of the organizations they had identified in the previous question as an organization “I know something about.”

	Not at all likely to donate 1	2	3	4	Very likely to donate 5
East Bay Coalition for the Homeless	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Crossroads RI	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
RI Coalition for the Homeless	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
RI Housing Resources Commission	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Statewide Housing Action Coalition	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Housing Network for Rhode Island	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Advent House	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Amos House	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Nickerson House Gateway to Independence	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
People to End Homelessness	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Providence Center	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
W. A. R. M. Shelter	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

CM9 We would like your opinion about how effective each of the following would be for conveying the EBCH message to the community.

	Very Ineffective	Ineffective	Somewhat Ineffective	Neither	Somewhat Effective	Effective	Very Effective
Homelessness does not discriminate. It does not matter how old you are, whether you are well-educated, or have fought for our country.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The East Bay Coalition for the Homeless helps people thrive in society through transitional housing, a work requirement, and skills training.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Homelessness can happen to anyone.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The EBCH has made a difference in the lives of hundreds of Rhode Islanders.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The EBCH cannot do its work alone; we need your help to make this difference, too.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

CM10 Would there be a more effective or compelling way to convey the EBCH message to the community?

CM11 Do you currently donate to any charitable organizations?

- ☐ No
- ☐ Yes (Please tell us which ones.) \_\_\_\_\_



CM12 What factors do you consider when choosing a charitable organization to donate to?

Check all that apply.

- ☐ Belief in the organization's cause
- ☐ Popularity
- ☐ Outreach ability
- ☐ Religious affiliation
- ☐ Friends or family influence
- ☐ The organization spends its money wisely
- ☐ I know where my money goes when I give to this organization
- ☐ Other \_\_\_\_\_
- ☐ I do not donate to charitable organizations

CM13 Would you consider donating to the EBCH?

- ☐ I don't know enough about EBCH
- ☐ No
- ☐ Maybe
- ☐ Yes

Non-Donor/Community Member respondents would next see the final Classification Questions (CL1 – CL9) beginning on the next page.

**THESE CLASSIFICATION QUESTIONS WERE ASKED OF ALL RESPONDENTS (CL1 – CL9)**

**These last questions are asked solely for classification purposes.**

**No individual information will be reported.**

**All your responses are anonymous and confidential.**

CL1 Have you ever been affected by, or known someone who has been affected by, homelessness?

- ☐ Yes
- ☐ No

CL2 Are you...?

- ☐ Male
- ☐ Female

CL3 In which age range do you belong?

- ☐ Less than 25 years old
- ☐ 25 - 34
- ☐ 35 - 54
- ☐ 55 - 74
- ☐ 75 years or older

CL4 What is your current marital status?

- ☐ Never Married
- ☐ Separated
- ☐ Divorced
- ☐ Widowed
- ☐ Currently Married
- ☐ Living with a Partner
- ☐ I'd rather not say

CL5 What is the highest degree or level of school you have completed?

- High school or equivalent
- Some college, no degree
- Associate or Bachelor's Degree
- Graduate Degree
- I'd rather not say

CL6 Employment status...

- Unable to work
- Retired
- Student
- Not currently working outside the home
- Employed
- I'd rather not say

CL7 What is your household average yearly income?

- Less than \$25,000
- \$25,000 - \$49,999
- \$50,000 - \$74,999
- \$75,000 - \$99,999
- \$100,000 and up
- I'd rather not say

CL8 If there is anything else you would like to tell us, here's the place.

CL9 We appreciate your taking the time to fill out this survey.

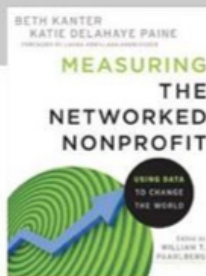
Every response helps make East Bay Coalition for the Homeless a better organization!

# Appendix E

## E: Crawl-Walk-Run-Fly Model for Non-profit Social Media Strategies

### Becoming A Networked Nonprofit: Maturity of Practice Model: Overview

Crawl	Walk	Run	Fly
Time Investment	Link Social to Communications Objective	Integrated Content Strategy	Integrated Multiple Channels
Culture Change	Social Media Policy	Engage Influencers and Partners	Network Building
Basics	Small Pilots for Insights and Practice	Best Practices in Tactics Tangible Results	Reflection, Continually Improve Results



From "Measuring the Networked Nonprofit"  
<http://bit.ly/measure-networknp>

## Networked Nonprofits: Maturity of Practice Crawl, Walk, Run, Fly Model

### Introduction

Transforming into a Networked Nonprofit happens with small, incremental, and strategic steps. In the book, “Measuring the Networked Nonprofit,” by Beth Kanter and KD Paine, the “Crawl, Walk, Run, Fly” maturity of practice model is introduced to help them assess this transformation. The rubric helps nonprofits figure out what incremental steps are needed to get to the next level. It takes months, if not years, to reach the highest level of networked nonprofit practice.

The framework is designed to encourage nonprofits to succeed by helping them understand and measure the nature of the change process they are going through. This model is simply a method for organizations to figure out where to focus time and learning to get to the next stage. It can also be used to refine and evaluate a technical assistance program.

### Seven Vital Characteristics of Networked Nonprofits

*The Networked Nonprofit* introduced the concept of a different kind of nonprofit organization called a networked nonprofit or one that leverages the power of social media to expand its network of supporters and thereby greatly increase its success. In that book, two types of networked nonprofits are profiled: those *born* as networked nonprofits and traditional nonprofits that are on their way to *becoming* networked nonprofits. *The Networked Nonprofit* walked nonprofit leaders through the process of changing their orientation from managing organizations to participating in and managing networks. It was aimed at helping nonprofit leaders take the first steps to using social media successfully.

Knowing how to use social media well is not just about knowing which button to push or what technological wizardry to employ. The power of a networked approach is its ability to connect people to one another and help build strong, resilient, trusting relationships that lead to real on-the-ground social change.

- 1. Networked nonprofits know their organizations are part of a much larger ecosystem of organizations and individuals that provides valuable resources.** Networked nonprofits understand that they don't need to own the to-do list, only the results
- 2. Networked nonprofits know that relationships are the end result of all the interactions and conversations they have with their networks.** They are comfortable doing their work transparently and have a culture that allows this. It makes them open to serendipity and new ideas.
- 3. Networked nonprofits experiment, and learn from their experience.** They are masters at experimenting their way into dramatic wins. They don't shy away from failure, because it leads them to innovation and success.
- 4. Networked nonprofits have data-informed cultures.** They use data to assess their experiments and measure their success. They use data to make decisions and develop strategy, pick platforms, and identify influencers.

**5. Networked nonprofits know how to inspire people.** Networked nonprofits motivate their networks of support to help shape the organization's programs, to share their stories in order to raise awareness of social issues, to change attitudes and behavior, and to organize communities to provide services or advocate for legislation.

**6. Networked nonprofits work differently.** They enjoy a social culture that encourages everyone in and outside the organization to participate and spread the organization's mission. They have challenged deep-set organizational assumptions about leadership, roles, and structures. They have broken down departmental silos. They are comfortable sharing control or co-creating with their networks—whether that means allowing people to retell the organization's story in their own words or scaling programs.

**7. Networked nonprofits are masters at using social media.** They are adept at using tools that encourage conversations and building relationships between people, and between people and organizations. They are able to scale their efforts quickly, easily, and inexpensively. Networked nonprofits are adept at blending tried and true methods with new digital tools. They also understand how to dance between the spontaneous nature of social media and strategic communications.

## The Crawl, Walk, Run, Fly Model

As Martin Luther King said:

*"If you can't fly then run, if you can't run then walk, if you can't walk then crawl, but whatever you do you have to keep moving forward."*

The Crawl, Walk, Run, Fly hierarchy is designed to help organizations understand that becoming a networked nonprofit is typically a complex and lengthy process. Its purpose is to encourage and motivate organizations to succeed by helping them understand the nature of the process they are going through. This model is simply a method for organizations to figure out how where to focus time and learning to get to the next stage. It can also be used as a framework for designing and evaluation peer learning networks.

Not every nonprofit will go through the levels at the same pace, as different organizations have different cultures, capacities, communication objectives, program designs, and target audiences. And the reality will be messy; an organization might not precisely fit the profile in any specific category. But every organization can take pride in their success at whatever they have achieved.

### Crawl

Organizations that are in the "Crawl" stage of becoming networked nonprofits are not using social media or emerging technology at all, or if they are using it, they're not using it consistently and are not using any measurement processes. These organizations lack a robust communications strategy or program plan that can be scaled using a networked approach. "Crawlers" are not just smaller nonprofits, but may include larger institutions that have all the basics in place, but lack a social culture or are resisting transforming from a command-and-control style to a more networked mindset.

At this stage, the organization does not know where to start. It collects data from time-to-time, but doesn't do formal reporting. What data is collected doesn't relate to decision-making. There are no systems in place, no dashboards, and no collection methods. Staff is often overwhelmed by the thought of measurement and the task falls to the bottom of the to-do list. There is no process for analyzing success or failure. Decisions are all passion-driven.

These nonprofits need to develop a basic communications strategy or program plan. They will learn and benefit from inspiring stories from peers. Perhaps your organization already has a robust program plan or communications strategy in place, but is facing challenges to adopting a networked way of working. If so, you should start with a discussion of the issues, followed by codifying the rules in a social media policy.

## Walk

The nonprofit as the "Walk" stage is using one or more social media tools consistently, but this use may or may not be linked to a communications strategy, campaign, or program plan. Or, they may be approaching social media as a broadcast channel and not engaging or only sharing content and messaging from their own organization.

They have in place best practices on tools and techniques as part of the organizational skill set, but may need assistance developing a social media strategy to support short and long-term SMART (Specific, Measurable, Achievable, Realistic, and Time) objectives. They may also need help to correctly identify the audiences they need to target.

Walkers have internalized listening and are able to use the data they collect to improve engagement and content best practices. At this stage, leadership may not fully understand social media and networked ways of working. Often, the question "What's the value?" surfaces. The organization should implement a small, low-risk pilot that can collect stories and numbers to help leadership better understand the value and benefit of costs. The nonprofit in the "Walk" stage needs to avoid spreading the organization's resources too thin. It should focus on one or two social media tools, going deep on tactics, and generating tangible results to demonstrate value.

"Walkers" must identify low-cost ways to build capacity internally, like using interns or volunteers effectively and integrating social media tasks into existing job descriptions. Staff members should evaluate current job tasks and identify what they don't need to do in order to make time for social media and other emerging technologies, all with support from leadership. They must also enlist the help of their social networks outside their organization.

A "walking" nonprofit's social media policy formalizes the value and vision for social media use and networked approach and encourages free agent outsiders to help with implementation. The organization integrates simple measurement techniques and learning as an organizational habit that helps improve practice. The organization has begun to set up a process for experimenting, learning, and adopting new channels in full, if appropriate.

At this stage, the organization is regularly collecting data but not in a consistent manner. For example, different people and departments may be collecting data but not sharing it. Or data is focussed on the metrics that are specific to social media channels but not linked to high-level organizational results or mission-driven goals across programs and could, in fact, be the wrong data. Discussions on how to improve results are rarely part of staff meeting, nor are there linkages to organizational experience. The organization does not understand the fine distinction between being data-driven and the intelligent use of data.

## Run

The nonprofit at the “Run” stage uses one or more social media tools and is strategic, identifying key result areas and key performance metrics that drive everything they do. They also have a formal ladder of engagement and know how to measure it. They understand the importance of visualizing their networks and measuring their relationships. At this level, an organization is religiously practicing basic measurement practices.

In a “Running” organization, social media is not in a silo or guarded by one person or department. With a social media policy in place and a more social culture, the organization is comfortable with working transparently and working with people outside its organization, like free agents. They know how to use measurement to identify these influencers. The board is also using social media as part of its governance role.

The main problem for “Runners” is scaling. To build internal capacity they may need to bring on a half- or full-time staff person who serves as a community manager, building relationships with people on social media or new technology platforms. This social media point person also works internally as a network weaver or trainer to help departments and individuals use social media to support the organization’s programs.

“Runners” effectively integrate social media and emerging technologies such as mobile across all communications channels and know just the right combination of measurement tools to evaluate their performance. “Runners” have strong capacity in content creation as well as repurposing or remixing across channels. They use an editorial calendar and have an editorial process in place on a weekly or monthly basis to create, coordinate, and curate content across channels. They are routinely tracking the performance of their content by channel, theme, topic, time of day, and other factors and making adjustments based on measurement.

They use crowdsourcing to create and spread content and build their network. Runners also incorporate social fundraising as part of their fundraising tool box, knowing that community engagement is as important to measure as dollars raised. They also work with influencers or champions in a formal way as implement social media strategy in collaboration with partners to build their network.

At this stage, the nonprofit has an organization-wide system and dashboard for collecting measurement data that is shared with different departments. Decisions are not based solely on a data or intuition, but multiple sources. Managers hold weekly check-ins to evaluate what’s working and what’s not across communications channels, as well as, any specific social media feedback received that would help shape our future campaigns or social media use.

At this stage it monitors feedback from target audiences in real time but supplements that information with trend or survey data. The organization may work with measurement consultants or specialists to improve skills and capacity and it provides training and professional development for staff to learn how to use measurement tools.

## Fly

Organizations in the “Fly” state have mastered everything at the running stage and internalized it. Flyers create a culture of public learning for both individuals and the entire organization. They embrace failure and success alike, and learn from both. The organization uses data to make decisions, but leaders understand how to lead from the heart as well as the head. The organization has documented and shared dramatic results with its stakeholders and peer organizations. Flyers are part of a vibrant network of people and organizations all focused on social change.

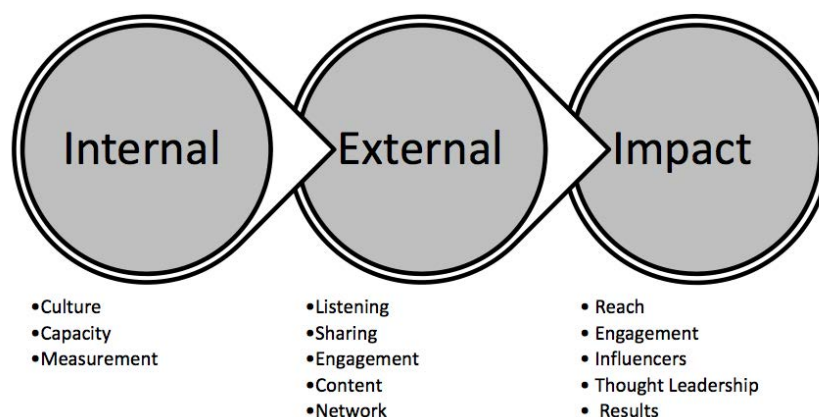


Organizations in this category have adopted sophisticated measurement techniques, tools, and processes. The non-profit has established key performance indicators that are used across programs. The organization has a staff person responsible for managing the organization's data, but all staff are empowered to check and apply their own data. In addition to providing weekly check-ins, the organizational dashboard includes key performance metrics related to goals. The organizational dashboard is shared across departments and there is a process for analyzing, discussing, and applying results.

The organization uses data visualization techniques to report the data analysis but also to reflect on best practices culled from the data. There is no shame or blame game because of "failures," instead these are embraced as learning opportunities. There is a regular report to senior leadership that details high level success, challenges, and recommendations for moving forward. Staff performance reviews incorporate how measurement is not viewed as an afterthought, but as part of an ongoing decision-making process that helps the organization continuously improve its programs.

## Definitions

A networked nonprofit leverages the power of social media and working in a networked fashion to expand its network of supporters and thereby greatly increase its capacity and success. Becoming a networked nonprofit can be a slow process, but with patience your organization will realize the powerful benefits of this profound transformation. The next section describes a rubric to help your organization self-assess what level your organization's practice is currently at and to help prioritize activities that will help improve Networked Nonprofit practices as you implement your organization's social media strategy.



## Definitions and Indicators

Theme	Category	Indicator	Definition
INTERNAL	CULTURE	Networked Mindset	An emerging leadership style that is characterized by greater openness, transparency, decentralized decision-making, and collective action. Operating with an awareness of networks you are embedded in, and listening to and cultivating these networks to achieve the impact you care about. It means exercising leadership through active participation.
		Institutional Support	Senior management and board level support the organization's presence and participation on social networks. A social media policy that explains the rules and operationalizes the strategy and includes a social media work flow or triage work flow. It was developed through internal discussions and review of policy, not a cut and paste of another organization's policy.
		Communications Strategy	The organization has an integrated communications strategy that includes SMART objectives, target audience definition, measurement, and tactical implementation. Social media is aligned with this strategy and there is discussion of how social best practices are being deployed.
	CAPACITY	Hours	The amount of staff time allocated to implement social media – ranges from less than five hours per week to having a full-time dedicated staff position and all staff having some social media responsibility integrated into their job responsibility.
		Expertise	This is the staff level and experience of the individual(s) managing the social media strategy. It ranges from intern or volunteer to having senior staff. Best practice is that implementation is by a cross-department team, not housed by one person or department.
		Social Channels	The number of social media channels selected and used is sufficient to support objectives and matches capacity to implement strategically. The organization has a process to research, test, and adopt new channels on a larger scale as appropriate.
	MEASUREMENT	Analysis	The organization has identified KPI across all programs and knows and uses the specific "counting" metrics for social media. The organization has a system for collecting and analyzing its data and collect only the data it needs for decision-making.
		Tools	Selects the right analytics program, content analysis, or survey tools for the job. This may be a combination of free and paid tools and the organization understands the importance of collecting and synthesizing data from multiple sources/tools. Uses spreadsheets, data visualization tools/techniques, and other tools as appropriate.
		Adjustment	The organization has a dashboard, a system and structure for reviewing and applying data and analysis collected. Uses data for planning strategy and tactical decisions. The organization looks at successes as well as failures and is able to make adjustments that improve results.
EXTERNAL	LISTENING	Brand Monitoring	The organization is using keywords and persistent search tools to routinely observe and monitor conversations and mentions. The organization has a process to regularly synthesize and apply findings. The organization uses a combination of free and professional tools based on volume of mentions.
		Relationship Mapping	The organization has mapped its network of individuals and organization partners using social analysis tools, ranging from low tech (hand-drawn maps) to social network analysis tools
		Influencer Research	The organization uses a process to identify and evaluate "influencers" or "brand ambassadors" and follows up with cultivating relationships as appropriate to reach goals.
	ENGAGEMENT	Ladder of Engagement	The organization has a "ladder of engagement" model for its audiences to bring people in its network from awareness to engagement to action.
		Responsiveness	The organization responds to comments and engages with network on social channels within a reasonable amount of time. The organization responds to brand mentions on social channels as appropriate and uses best practices to deal with "trolls."
	CONTENT	Integration	The organization uses an editorial calendar to guide content creation, curation, and coordination so it is consistently publishing good content it audiences want to consumer across all channels. The organization is able to balance strategic (planned content) with spontaneous (timely or breaking news).
		Social Content Optimization	The organization uses research, best practices, and measurement to ensure that its content is optimized for social channels. This includes topics, frequency, timing, visuals, and content types.
	NETWORK	Network Building	The organization uses social events like "Twitter Chats" to help build its network and engage existing supporters. It also uses techniques such as crowdsourcing from its network to develop content or ideas for campaigns.
		Collaboration with Partners	The organization consistently collaborates with like-minded partners on activities that leverage a networked effect. This may include collaborative editorial calendars, sharing content from other partners, or social events.
		Social Fundraising	Social fundraising is integrating the use of social media with tried and true fundraising techniques. Social fundraising is inspiring people in your network to ask their networks to give support. Social fundraising encompasses more than just the transactional act of making a donation, it includes many ways in which individuals and their network cans support nonprofits.
IMPACT		Reach	The organization has benchmarked the number of fans, followers, and connections and compared to peers and national indexes.
		Engagement	The organization understands that engagement differs across social channels and can be measured as low, medium, or high based on the amount of effort required to engage. The organization has also developed a ladder of engagement for its strategy and uses it for strategy and measurement.
		Influencer	Influence means the power or ability to affect someone's actions. For a social media strategy, this done by working with "super fans" or free agents. Influence is multi-dimensional and complex and should not be measured solely with aggregated systems, but also requires other research. Identify champions for your cause by measuring influence, then measure the success of your champions by whether or not their participation helped move the needled on your defined goals.
		Thought Leadership	This is a measure of how influential the organization is in its sphere of practice. The organization understands that the ideal way to measure this is not only influence scores from tools like Klout, Kred, and others, but also measures perceptions. The organization selects one influence tool to use to measure and track its score and sticks with it.
		Results	The organization is tracking the "conversion" rate to action or other tangible results. It is also able to translate these metrics into a financial or social change value related to its overall objectives.

## NONPROFIT SOCIAL MEDIA MATURITY OF PRACTICE: CRAWL, WALK, RUN, FLY

INDICATORS	CRAWL	WALK	RUN	FLY
<b>INTERNAL</b>				
<b>CULTURE</b>				
Networked Mindset	Understanding of networks that are connected to organization	Listening to and cultivating relationships with networks based on mapping networks.	Comfort level with greater organizational openness and transparency. Leadership is using social networks and comfortable with showing personality.	Leadership is comfortable using decentralized decision-making and collective action with networks. Considers people inside and outside of the organizations as assets in strategy.
Institutional Support	Social media policy is drafted and gaining support through "road shows" with departments	Social media policy has been discussed and approved by leadership.	Social media staff position includes facilitating training other staff to use social networks.	All staff use social media effectively to support organization objectives. The social media policy includes a social media work flow or crisis response flow chart and it is used.
Communications Strategy	Consideration of communications strategy with SMART objectives and audiences and strategies for branding and web presence.	Strategic plan with SMART objectives and audiences, including strategy points for integrated social media.	Includes an integrated content, social fundraising, and engagement strategy. There is a formal influencer support program if appropriate.	Strategy includes working with align partners to implement.
<b>CAPACITY</b>				
Hours	5 hours or less per week of staff time is invested	5-19 hours per week of staff time is invested in one position. Other staff or intentions implement social media.	20-29 hours per week of staff time in a dedicated social media position. Other staff or interns or influencers implement social media strategy.	30-40 hours of staff time is invested in a dedicated social media position with support staff. Other staff or interns or influencers implement social media.
Expertise	Social media is delegated to a volunteer, inexperienced staffer or intern.	Social media is part of mid-level staff job description, with additional intern time	Senior level staff participate in strategy oversight or development.	Organizational leadership and boards get regular reports and ask good questions.
Social Channels	Actively using one social media channels, but may have presence on others.	Actively using 2-3 social media channels that connect with target audiences, but has a presence on others.	Actively using 4 social media channels that connect with target audience and has a process to research, experiment, and adopt new tools/channels.	Actively using more than 4 social media channels that connect with target audience. Uses processes to research, experiment, and adopt new tools/channels.
<b>MEASUREMENT</b>				
Analysis	Lacks consistent data collection or formal reporting. Draws conclusions from incomplete data or "drive by" analysis.	Data collection is consistent, but not shared between departments. Not all data is linked to decision-making for better results.	Data is from multiple sources and shared across departments through a dashboard. Does not collect data it doesn't use. Measurable objectives are based on benchmarking.	Establishes organizational KPIs and tracks in organizational dashboard with different views for departments or levels. May have data analyst on staff.
Tools	Not using or not using fully.	Using free or low cost analytics tools to collect metrics and analyze further in spreadsheets if required for actionable insights.	Using free/low cost analytics tools to collect metrics and analyze further in spreadsheets if required for actionable insights. Uses social media management/metrics professional tool to collect data.	Uses professional measurement and analytics tools. Provides training or uses expert consultants to assist in data/analysis.
Adjustment	Does not use data to make planning decisions.	Uses data for decision-making but not a formal organizational process.	Reports are discussed at staff meetings and used to make decisions that improve results.	Formal process for analyzing, discussing, and applying results. Data visualization and formal reflection processes.
<b>EXTERNAL</b>				
<b>LISTENING</b>				
Brand Monitoring	Observing conversations and receiving Google Alerts, but not doing analysis	Tracking keywords, influencers, or conversations using free tools, but does not have a formal organizational process for synthesis and reporting.	Tracking keywords, influencers, and conversations using free tools and weekly/monthly reporting and synthesis.	Tracking keywords, influencers, and conversations using free and paid tools and weekly/monthly reporting and synthesis. Capacity to use "real-time" information to

				decisions, avoid social media crisis before escalating.
Relationship Mapping	Lists organizations or partners but has not visualized or identified new ones.	Uses low tech methods (drawings and sticky notes) to visualize networks of individuals and organizations	Uses low tech methods and free social network analysis tools to visualize networks of individuals and organizations. Uses data to inform strategy and tactics.	Uses low tech methods and free and paid social network analysis tools and uses resulting visualizations to inform strategy and/or measure results.
Influencer Research	Not using	Uses online systems and "desk research" to identify, but is not monitoring.	Uses online systems and "desk research" to identify, monitor, and cultivate.	Uses online systems and "desk research" to identify, monitor, and cultivate and to build an influencer strategy.
<b>ENGAGEMENT</b>				
Ladder of Engagement	Not using	Informal description of different levels of engagement on different platforms or across platforms, but doesn't align with strategy or measurement.	Formal description of different levels of engagement based on survey or qualitative research. Aligns with strategy, but does not measurement process for all steps.	Formal description of different levels of engagement based on survey or qualitative research. Aligns with strategy and collects data and reports organized by engagement and conversion levels.
Responsiveness	Does not respond to comments posted on social networks or engage with networks	Responds haphazardly to comments on networks or engages with networks around content.	The communications team coordinates and consistently responds to comments on networks and engages with networks around content.	The organization responds through organizationally branded accounts and staffers to comments and networks and engages with networks around contents. The organization is able mobilize its network to circumvent a social media crisis.
<b>CONTENT</b>				
Integration	Posts content that may be relevant to audience, but not consistently.	Uses an editorial calendar to align content strategy with objectives and audiences and publish content across channels on a regular schedule.	Has an editorial process to brainstorm content, curates content regularly, and uses an editorial calendar to consistently publish. Is able to balance planned content with spontaneous postings that leverage its network.	Uses online collaborative editorial calendar or other mechanisms to share the content process across its network and with partner organizations or influencers.
Social Content Optimization	Does not use measurement or research to identify and refine optimization techniques.	Adopts best practices for social content optimization for frequency, time/day, type of content, length, and other variables.	Uses measurement processes to evaluate the performance of content on a regular basis and make improvements. Uses platform features to maximize content performance.	Uses measurement to evaluate the performance and this knowledge is built into the editorial decision-making process.
<b>NETWORK</b>				
Networking and Network Building	Is aware of social events, but doesn't host or participate. Does not solicit feedback or ideas from its followers. Staff do not leverage professional networks.	Participants in selected social online events. Had formal policy and operational manual for staff to use their professional networks on behalf of organization.	Hosts online social events with aligned partners but not regularly. Provides training and support for staff to leverage their professional online networks on behalf of the organization.	Hosts regular online social events with aligned partners or others as part of the overall strategy. Staff (and board) use of online professional networks is institutionalized.
Collaboration with Partners	Has partners but is not collaborating on social networks.	Connects and collaborates with aligned partners in a haphazard way, not consistent or strategic.	Consistent conversations and connections with aligned partners on social media platform(s) and implements small pilots.	Consistent collaborations with aligned partners on social channels with activities that are mutually aligned with objectives.
Social Fundraising	Aware but not using.	Has set up a presence on a social fundraising platform.	Testing a social fundraising platform with a small pilot and campaign and measuring engagement and dollars as success metrics.	Routinely implements social fundraising activity as part of integrated fundraising or stand-alone. Uses engagement and dollars as success metrics. Leverages influencers relationships. Learns to improve campaigns with data.
<b>IMPACT<sup>1</sup></b>				
Reach	FB/Twitter: 1-299 or based on benchmarks for your field Social Traffic Referral To Web Site: Less than 5% total visitors	FB/Twitter: 300-1000 or based on benchmarks for your field Social Traffic Referral to Web Site: 5-10% of total visitors	FB/Twitter: 1000-9999 or based on benchmarks for your field Social Traffic Referral to Web Site: 10-20% of total visitors	FB/Twitter: 10,000 plus or based on benchmarks for your field Social Traffic Referral to Web Site: 20% or more of total visitors
Engagement	FB: Less than 1% virility per post using Insights	FB: 1-3% less virility per post using insights (at least 1 post	FB: 3-5% virility per post using insights (at least 1 post per	FB: 5% virility per post using Insights (at least 1 post per

<sup>1</sup> The metrics listed here are guidelines and should be based on benchmarking peer organizations



	Twitter: RTs and @replies as percentage of total followers is less than 1%	per week) Twitter: RTs and @replies as percentage of total followers is 1-3 % or less per week	week Twitter: RTs and @replies as percentage of total followers is 3-5% per week	week) Twitter: RTs and @replies as percentage of total followers is over 5% per week
Influencers	No influencers or super fans actively engaging	5 or less influencers or super fans actively engaging	5-20 or more influencers or super fans actively engaging	20 or more influencers or super fans actively engaging
Thought Leadership	Klout Score: Less than 30	Klout Score: 30-44	Klout Score: 45-59	Klout Score: 60 or higher
Results	Not tracking	Shows a logic path in a theory of change from social media activity to social change results	Has an analytics or metrics tracking system to capture conversion rate from reach or engagement	Captures conversion rate is able to translate into financial value for organization.

Based on "Measuring the Networked Nonprofit" by Beth Kanter and KD Paine, Wiley, 2012 (<http://amzn.to/measure-networknp>)  
Beth Kanter (<http://www.bethkanter.org>)

# Appendix F

## Press Release Template and Example

### Press Release/Media Advisory Template

#### FOR IMMEDIATE RELEASE

Contact Name:  
Contact Phone Number:  
Contact Email Address:

**Headline** – One sentence to summarize the major points (Times New Roman; 20 points)

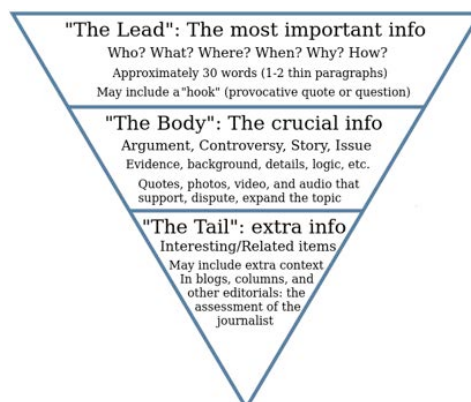
**Lead** – CITY, DATE – Explains the who, what, when, where, why, and how. One sentence; a short second sentence if necessary.

**Main Paragraph(s)** – Offer more details. They should be written in present tense. Each sentence is a paragraph. Keep the language simple and avoid jargon.

**Quotes (should be included in main paragraphs)** – This should be from a leader within the organization. Additional quotes can be taken from those participating.

**Closing** – Any additional details that are related to the event or announcement should go in the closing.

**NOTE:** All releases should be written in the inverted pyramid style. This means that the most important information (who, what, when, where, why, and how) goes at the top and the least important information is listed at the end.





FOR IMMEDIATE RELEASE

### **East Bay Community Walking to Help Fight Homelessness**

BRISTOL, Rhode Island (May 4, 2013) – Chief of police Josue D. Canario and other members of the law enforcement community will join with residents in the East Bay to raise awareness about the plight of the homeless in the East Bay. The WALK TOGETHER event is sponsored by the East Bay Coalition for the Homeless.

The event to be held at Barrington High School track and field will invite East Bay community members to a walk-a-thon in order to increase awareness of the East Bay Coalition for the Homeless' efforts to help community members that fall victim to homelessness. Activities will be available for children of all ages. Donated raffles and prizes will be distributed.

“As a member of East Bay community, I was happy to sponsor East Bay Coalition’s WALK TOGETHER event,” stated Joe Smith, owner of a local deli. “I hope when the community learns more about East Bay Coalition for the Homeless they will be inclined to contribute to this wonderful organization.”

Since 1989, the East Bay Coalition for the Homeless has been helping families get back on their feet and preventing homelessness. This organization provides housing programs and emergency rental assistance.

If you'd like more information about this topic, visit [eastbayhomeless.org/ebch/home](http://eastbayhomeless.org/ebch/home)

## Media Release

### For Immediate Release

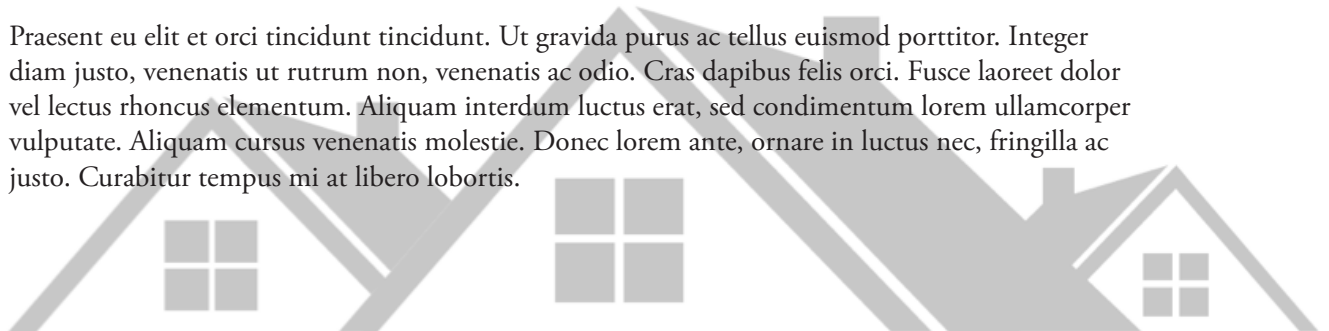
### East Bay Coalition for the Homeless Launches New Website

PROVIDENCE, RI MAY 8, 2013- Mauris justo tellus, consectetur et ultricies cursus, dictum vulputate enim. Cum sociis natoque penatibus et magnis dis parturient montes, nascetur ridiculus mus. Nam ut sapien eget elit porta aliquam ac eget risus. Praesent fringilla, mi a facilisis consequat, urna eros auctor dui, sed aliquam enim lectus ac tellus. Nunc diam felis, egestas a accumsan vel, semper sit amet velit. Mauris orci sem, gravida ac laoreet eget, euismod nec lacus. Quisque et nisi nisl, quis scelerisque turpis. Proin bibendum, felis eget viverra vestibulum, tortor tellus hendrerit justo, ac commodo metus tortor non quam. Donec sed nisi ut tellus placerat convallis non non tellus. Nunc sapien tortor, aliquet quis eleifend eget, vestibulum id metus. Maecenas iaculis tortor quis sapien feugiat et commodo purus ultricies. Mauris at elit at velit fermentum vehicula. Maecenas viverra suscipit sollicitudin. Morbi sed feugiat arcu. Mauris placerat laoreet mi, eu dignissim neque blandit ut.

Vestibulum accumsan ornare nulla ac varius. Sed dapibus mollis mi, vitae euismod eros ultricies in. Vivamus vel bibendum dolor. Etiam imperdiet risus ut massa fermentum vel euismod nulla tincidunt. In euismod pharetra enim non tincidunt. Morbi at felis in eros convallis eleifend sit amet nec lacus. Aenean gravida ultricies blandit. Ut id mattis sapien. Vivamus malesuada egestas hendrerit. Suspendisse malesuada turpis sit amet felis lobortis id rhoncus velit fermentum. Integer id magna quam, id lobortis quam. Nulla faucibus ipsum malesuada nibh consectetur aliquet. Vivamus gravida cursus nunc eu dignissim.

Praesent eu massa quis tortor sollicitudin auctor nec in leo. Etiam auctor purus vitae nulla pulvinar molestie. Suspendisse potenti. Etiam vel venenatis lectus. Aliquam erat volutpat. Aenean accumsan, ligula in fringilla scelerisque, nibh neque mollis risus, ut lobortis ligula ligula varius libero. Nunc varius justo at massa egestas fringilla. In metus dui, ultricies nec dignissim at, scelerisque quis odio. Donec rutrum commodo ligula porta faucibus. Nullam id ultrices eros. Sed a euismod mauris. Aenean ornare, nibh sed posuere auctor, nibh mi ornare sem, placerat aliquet velit neque quis turpis. Morbi sit amet metus in magna consectetur dapibus ut ac nulla. Mauris feugiat enim id libero lobortis tincidunt. Morbi vitae magna nisl.

Praesent eu elit et orci tincidunt tincidunt. Ut gravida purus ac tellus euismod porttitor. Integer diam justo, venenatis ut rutrum non, venenatis ac odio. Cras dapibus felis orci. Fusce laoreet dolor vel lectus rhoncus elementum. Aliquam interdum luctus erat, sed condimentum lorem ullamcorper vulputate. Aliquam cursus venenatis molestie. Donec lorem ante, ornare in luctus nec, fringilla ac justo. Curabitur tempus mi at libero lobortis.





# Appendix G

## Radio PSA Alert Template

**PSA Alert  
For Immediate Release  
[Date]**

Contact:

**Name  
Title  
Phone Number  
Email Address**

Headline – attention catching, summarize  
PSA Now Available

**CITY, STATE** – This should consist of roughly two paragraphs with several sentences in each. Keep the language simple. Must include the who, what, when, and where. Don't try to cram everything; list only the important details; space is limited. Write in the present tense.

*The next section is where you would list versions of your PSA for different time slots. This gives producers options and increases your chances of your PSA being used. Include a call to action for listeners.*

10 seconds: Include details using roughly 25 words

20 seconds: Use roughly 40 words

30 seconds: Use roughly 60 words

### (indicates the end of the document)

# Appendix H

## Press Conference Guidelines

### Hosting A Successful Press Conference

#### Timing

- » Pick a time that works for TV, newspapers and radio.
- » If it's too early in the day, reporters will have a hard time getting there. Too late in the day and you'll be pushing up against deadlines.
- » Mid-morning to noon is good.
- » Advanced notice is critical. You'd want to give people a day's warning, if you can. TV and radio news directors map out where their cameras and reporters will be. Give them time to plan.

#### Location

- » It should be close to the major media players, so they're not driving half-way across the state.
- » It should have good visuals, and be well-lit for TV. A dark theater is the worst choice.
- » Outdoor locations are sometimes OK, if the topic deals with the outdoors or the environment. But this is risk. Reporters usually want power outlets for their cameras and lights and laptops. Inside is usually best.

#### Length

- » Putting together a press conference is a huge production and a big pain, so there's a tendency to want to put on a big show. Try to avoid six speeches in a row and a PowerPoint slideshow.
- » Reporters want to hear a little about the news, then ask questions. You can skip on some of the production values and make reporters happy if you get to questions quickly. That's what reporters want to do: ask questions and get quotable answers.

#### Extras

- » Reporters will want documents, if you're announcing or explaining anything. Get a rough headcount and make sure there are enough copies to go around -- and post those documents online for reporters and bloggers who are interested in the press conference but couldn't make the trip.
- » Have somebody post updates during the press conference to your Twitter feed or Facebook page.
- » Inviting the media to a press conference means they'll be shooting video and recording audio. Give them good shots and good sound clips. Is there a person, an image or a single sentence that sums up what you're trying to say? Put that to use.

#### Practice

- » Make a list of likely questions. What will your answers be?
- » Also, do a rough walk-through of the press conference. Who talks first? What happens next? Who's going to MC? And who's the best person to tackle certain issues or questions?

# Appendix I

## Press Kit Guidelines

### **What to Include in a Successful Press Kit**

Press kits will vary based on what you are promoting and the type of venue where you'll be distributing your press kit.

What you do include is a very important decision because a press kit is an easy way to put the spotlight on you or your organization. You can even think of it as your company's greatest hits compilation because you're compiling the info you want the media to know about you and your services into one tidy package.

The main press kits components you'll want to consider are:

#### **Press Release**

Your press kit's press release details why you have a press kit in the first place. If you've got a new service, the press kit helps introduce it. If your organization is partnering with another, the press kit announces it.

#### **Brief Letter/Table of Contents**

Your letter can be addressed to the media thanking them for their interest in your organization and then you can provide a summary of what's included.

Make your media contact's name and contact info clear on this page since it will be the first one the press will see. All of these elements help your content come together and feel much more organized than just some papers stuffed into a folder.

#### **Brochure**

You can include your brochure also, to help explain your services in more detail.

#### **Product Sample**

The EBCH won't have product samples, but you can include testimonials, pictures, and the like to illustrate what you do and how well you do it.

#### **Past Press Coverage**

If you've received free media coverage, you can include a sheet that details those media outlets. If you're including articles, a few pages will be more than enough content for your press kit. Determine if a simple sheet identifying these outlets instead would better serve your press kit and the editor/reporter.

### **Fact Sheet**

A fact sheet can be a great addition to a press kit because it details features, benefits and other specific information in a way that educates the reporter or editor about your organization and/or services with quick hits of info. Fact sheets can be used for new services, new hires, news conferences and other areas where you want to provide key bits of facts that a reporter or editor may want to use word for word.

### **Organization Background**

Writing an organization history page can be valuable for all of your future press kits. This background details your beginnings - where you've been and where you're going. Be sure to update it with recent accomplishments and other good news in your history.

### **Executive Bios**

A new CEO. A new PR person. New members on your board of directors.

Executive bios, along with high-resolution images, give an editor or reporter much-needed background information about the people behind the organization. Some publications print a bio word for word so write the bio in the third person point of view rather than first person point of view.

### **Quote Sheet**

Your media contact's info should be very easy for any editor to find for additional questions about your press kit. But a quote sheet can also be used to give busy editors quotes they need to complete an article without tracking down your PR person.

A quote sheet can feature quotes from your executives, donors, even the PR contact. One sheet of quotes can answer the most obvious questions an editor's likely to have and can be put in a quote that sounds professional and informative. You want each quote to look good on paper since that quote could be used verbatim in print.

### **Images**

Is an image relevant to your press kit? If so, be sure it's a high-resolution image.

A 5x7 photo is large enough to be scanned, cropped and scaled down to any publication's needs. A high-res image on a disk can drive up the cost of your press kit but it's also an alternative if you have a large amount of photos to distribute.

You can also include high-res images on your Web site for the media to download as well. Just be sure to include the direct link to your image gallery in your press kit materials.

# Appendix J

## WordPress Guide



# WORDPRESS

## How to Use Your Site

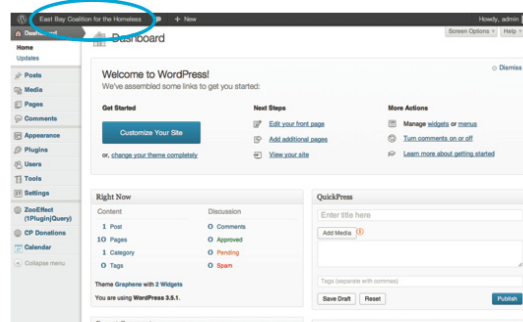
**Includes images and step by step processes on how to navigate WordPress.  
No need to fear!**

Kelsey Alexander  
Leah Barwise  
Karlene Kiskinis  
Christina Micela  
Kyle Palmer

## Viewing Your Website

Whenever you make a change to your site using WordPress, it is highly recommended to look at how it will appear without constantly having to open the site in your browser. To look at your site using WordPress:

1. Click on [East Bay Coalition for the Homeless](#) located on the top of the screen. This will take you to a live preview of your site.
2. To go back to the Dashboard, hover over the same [East Bay Coalition for the Homeless](#) button and click **Dashboard**.



## Signing Into WordPress

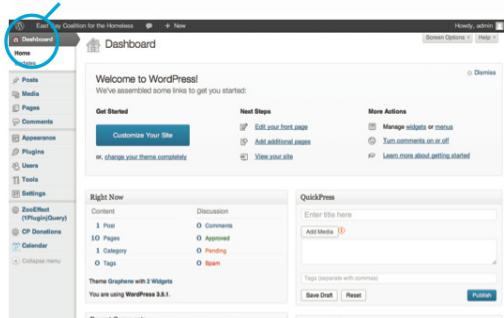
1. Open your internet browser and type the following:

[www.yoururladdress.com/wp2/wp-admin](http://www.yoururladdress.com/wp2/wp-admin)

2. Once you have done so, the image to the right will appear in your window. Proceed by typing in your **username** and **password** that is given to you. Then press **Login**. This will bring you to the Dashboard of your WordPress account.



Whenever you need to return to this page, simply press **Dashboard**.

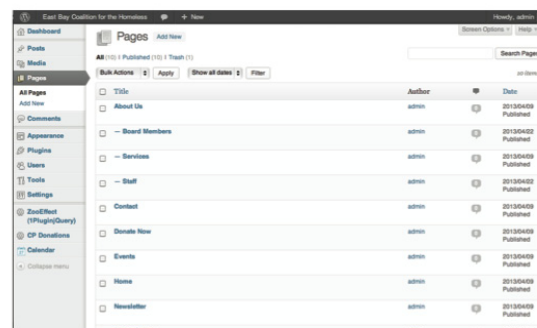
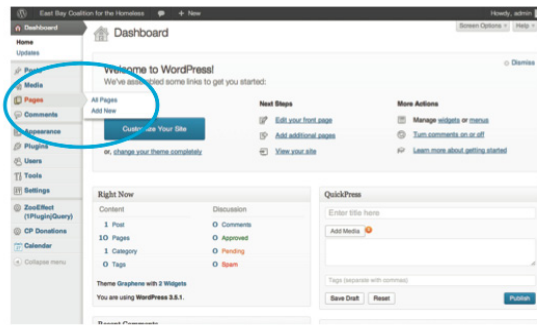


This is what your home page to access WordPress will look like. Don't get intimidated! We're here to help!

### Adding Another Menu Option

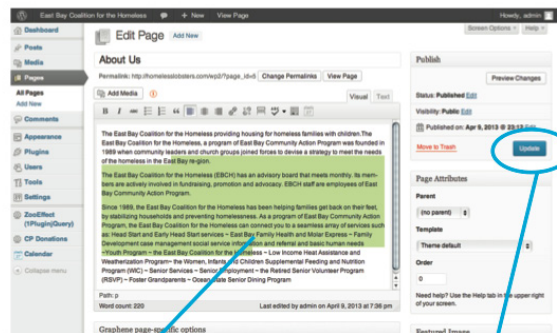
Want to add another menu onto your website? Here are some easy steps to teach you how:

1. On the home page, click on **Pages**. Since you already have pages, proceed by clicking **All Pages**.
2. A list of pages will show up that you currently have. These are the menu links that appear at the top of your website.



3. To edit the information on a current page, hover over the page and click **Edit**. You will then have access to a page where you can add or delete information written in the text box. Once you are finished with your edits remember to press **Update** located at the right side of the page. This will save all of your updates.

**NOTE:**  
If you would like to delete a page, repeat Step 1. Then hover your mouse over the page you wish to delete and press **Delete** located under it.



type in information here that you wish to change/add/delete from your current page

when you are done editing don't forget to press this button or all your changes will not save!

## Adding Calendar Events

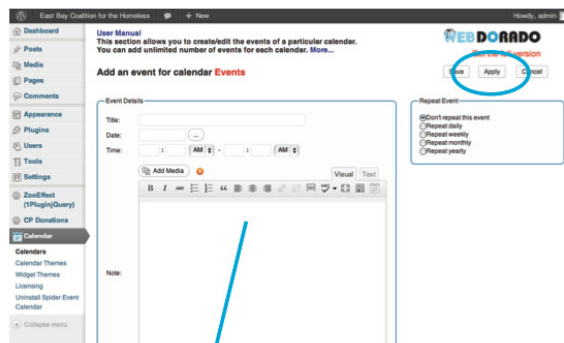
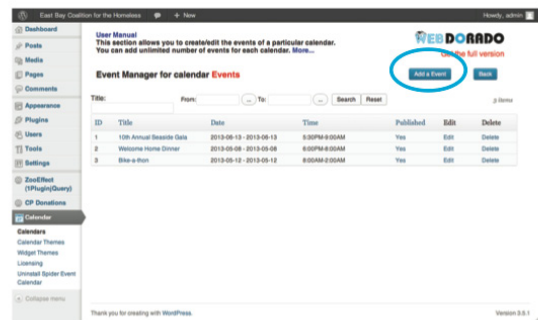
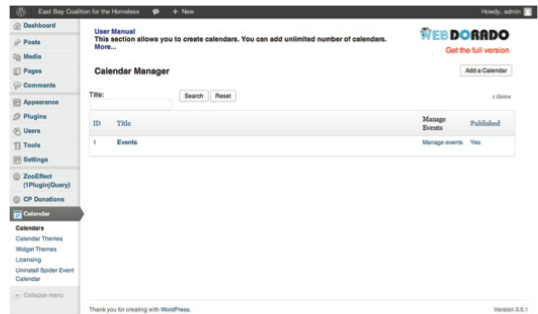
Since we made a calendar for your website we want to help show you how to use it so more people can be informed about the dates and times of your upcoming events!

1. On the Dashboard of your WordPress account, look to the left sidebar and click [Calendar](#). You will then be brought to the page shown to the right. Click on [Events](#).

2. You will then be brought to this page. Here you can add (or delete) your events! Lets try adding a new event! Lets start by clicking [Add Event](#).

3. This will bring you to a page that looks like the one shown to the right. Here you can add any information that you would like to show up on the Calendar. When you are done, you can publish your new event by simply clicking [Apply](#).

This will add your event directly to the list of other events shown on the previous page. It will automatically put your event onto your calendar shown on your website.



add all your key  
information here  
then click apply at  
the top right when  
youre done!



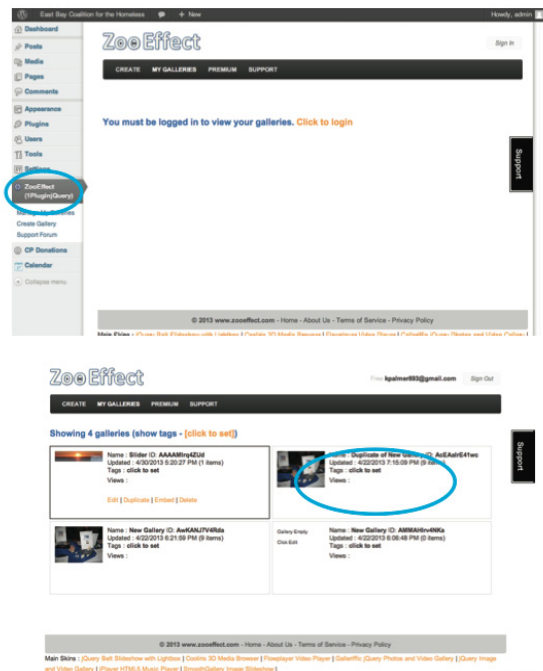
### Editing the Photo Gallery

We know that people love seeing themselves on peoples websites. We created this photo gallery for that very purpose! Here is the steps on how to add more images to your gallery so you can share memories with everyone:

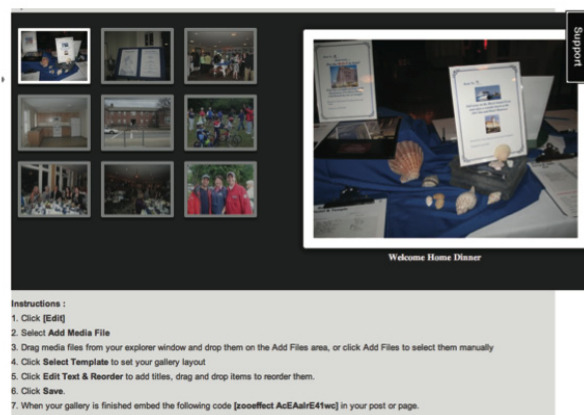
1. Go back to the Dashboard of you Word-Press account.

2. On the sidebar to the left, click on the [ZooEffect](#) plugin.

3. Once you sign in this is the page that will appear (right). To add images to your photo gallery, however over the circled area (right) and click [Edit](#).



You will then be taken to this page where you can follow easy instructions to add to your gallery!





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