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PARTNERSHIPS IN FOSTERING POVERTY ALLEVIATION:
A CASE STUDY ON THE *TOGETHER OHIO* CAMPAIGN IN APPALACHIAN
COMMUNITIES

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Partnerships in Fostering Poverty Alleviation:

A Case Study on the *Together Ohio* Campaign in Appalachian Communities

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Chapter 1: Introduction

On January 20, 1969 during his first inaugural address President Richard Nixon enlisted the assistance of the public at the grassroots level, stating:

To match the magnitude of our tasks, we need the energies of our people—enlisted not only in grand enterprises, but more importantly in those small, splendid efforts that make headlines in the neighborhood newspaper instead of the national journal (Cull & Hardy, 1973, p.15).

In a decade defined by political and social unrest the way forward was with community organizations working collaboratively to address the most pressing needs in the communities they served. Now a decade into the new millennium, the U.S. is once again facing political and social turmoil driven by an economic recession.

Nowhere is the impact of the recession more apparent than in Ohio, especially in Appalachian communities experiencing some of the worst poverty in the country. Athens and the surrounding counties make up the poorest region of Ohio. According to US Census Bureau data, 34.7 percent of families were living in poverty in 2009, compared to 15.1 percent for the state as a whole (U.S. Census Bureau, 2009). The onus of responsibility for addressing the overwhelming poverty in these communities falls to community organizations, including nonprofits and faith-based groups that, despite increasing need, are receiving less financial support because funding for public service programs is being slashed in order to balance the state budget. According to a report by U.S. News, Ohio is facing a budget shortfall of approximately \$3 billion for the 2012 fiscal year (Kurtzleben, 2011).

Managing increased responsibility with decreasing resources, the greatest challenge facing service organizations is moving away from a “turf war” mentality,

where competition for limited funding drives efforts, toward the creation of a collaborative environment where resources are consolidated and effectively utilized. This is especially important when trying to coordinate volunteer efforts. John Hardy and Richard Cull spell out the problems facing volunteer coordination in their 1973 book “Applied Volunteerism in Community Development”:

The organizing of individual groups for effective social service and reform is a major problem in that individuals who wish to be involved in volunteer work are often out of touch with the people who have the need for their services. In addition, once volunteers or groups of volunteers begin to work, they may be highly ineffective due to lack of proper coordination and supervision of their efforts (Cull & Hardy, 1973, p.5-6).

In this context, collaborative partnerships can connect pools of volunteers in the community to nonprofit organizations that have a clearly defined mission and structure, but need increased capacity to carry out that mission. While in theory this seems like a logical solution, there are two challenges that present themselves during the adoption of this mindset. The first is that nonprofits need to fundamentally change their self-preservation behavior and introduce active collaboration as a foundation of their institution. The second challenge is that these organizations need to learn how to pursue collaborative relationships within the appropriate contexts and with organizations such that both gain a comparative advantage through collaboration. Not all attempts at collaboration are successful and there are strategic steps to effective collaboration. Social marketing is an effective tool in addressing both these challenges, it encourages behavioral change utilizing marketing principles and it provides an educational foundation that fosters successful relationships. This thesis is

a case study of one such attempt to foster effective collaboration through the use of social marketing.

Together Ohio and A Call to Action

In January 2009 the Regional Nonprofit Alliance, part of Ohio University's Voinovich School of Leadership and Public Affairs, and in collaboration with the Corporation for Appalachian Development (COAD), Sojourner's Care Network, the Steven's Literary Center at Ohio University and the College of Osteopathic Medicine (OUCOM), collectively known as the Southeast Collaborative, was awarded the *Together Ohio Community Engagement Partnership Grant (CEPG)* offered through the Governor's Office of Faith-Based Community Initiatives (GOFBCI). The goal of the Together Ohio Grant is to form partnerships between community and faith-based groups looking to engage in service, and organizations that need assistance. Faith-based groups are categorized as groups affiliated with either a religious institution or movement. The category "community-based groups" includes a wide array of organizations including campus groups with a record of service, social clubs, advocacy groups, etc. In addition, the grant sought to fund capacity building initiatives and technical assistance targeted toward organizations within the categories described above that are dedicated to community development.

In order to achieve the goals set forth by the Governor's Office, the Southeast Collaborative committed to four directives for the 2010-2011 academic year. The first was to conduct a comprehensive Regional Capacity Building Needs Assessment in order to determine the greatest areas of need in the 15 counties that make up the

region. The Collaborative then developed a training curriculum based on the results of the Needs Assessment and scheduled seven capacity building trainings that address the areas of need. The third directive was to provide one-on-one technical assistance for nonprofits and community organizations in the region, with the Regional Nonprofit Alliance serving as the liaison for technical assistance requests from the community. The final directive was to design and implement the Regional *Call to Action* Outreach Strategy.

A Call to Action is an initiative created by the Governor's office to pair groups interested in engaging in long-term volunteering with state-operated organizations. *A Call To Action* is structured such that interested groups pledge to volunteer in specific areas of need as dictated by the Office of Faith-Based Community Initiatives. In total there are eight identified areas of need, as summarized in the table below. When a group pledges to take part in the initiative, it is contacted by the Governor's office and connected to a service organization in its area, which can guide it through the necessary training and preparation to meet its commitment to service. The primary role of the Southeast Collaborative under this directive is to advertise *A Call to Action* and facilitate the pledging process. Throughout the year the Regional Nonprofit Alliance will serve as a continued source of support for pledging organizations.

This case study will focus on two unique, but interconnected areas of work associated with the *Together Ohio Grant*. The first is the direct recruitment of groups to volunteer within identified needs areas under *A Call To Action*. The second is the fostering of partnerships between nonprofits and faith-based organizations through

volunteer retention and collaboration training institutes conducted in April as part of the greater goals of *Together Ohio*. Specifically, the case study will analyze the use of social marketing as a means of recruiting teams to volunteer in the needs areas outlined in *A Call to Action* and to promote the formation of volunteer partnerships between faith-based organizations and nonprofits with the Partnership Development Institutes (PDIs). The consistent objectives between these two focuses are to increase capacity of service organizations in the region so that they can continue to provide valuable services to their communities, and to foster a collaborative atmosphere between faith-based organizations and non-profits.

Table 1: Focus Areas in *A Call To Action*

Focus Area	Connecting Organization	Description of Volunteer Experience
Food Security and Local Food Pantries	The Ohio Association of Second Harvest Foodbanks (OASHF)	Volunteer groups assist the pantry or soup kitchen by organizing food and monetary drives.
Foster and Adoptive Care Recruitment	Ohio Department of Jobs & Family Services (ODJFS)	Volunteer groups help recruit foster parents and those interested in adoption.
Youth Mentoring	Local Mentoring Organizations	Volunteer groups work to recruit adult mentors for the organization. In addition, group members can volunteer to serve as a mentor.
Corrections and Re-Entry	Ohio Department of Rehabilitation and Correction (ODRC), Department of Youth Services (DYS)	Volunteer groups are connected with an organization (depending on interested) and go through the necessary application and training process before volunteering within the facility.

Consumer Protection and Financial Education	Treasurer's Office	Volunteer groups attend a training session to learn about credit, money management, savings, identity theft and surviving job loss. After the training, groups will be prepared to offer financial education classes in their community.
Summer Food Programs	Ohio Department of Education	Volunteer groups sponsor a Summer Food Service Program, which provides free lunches to children from low-income families.
Disaster Preparedness	Ohio Chapter of Volunteer Organizations Active in Disaster (VOAD)	Volunteer groups are trained on how to respond during a disaster.
Ohio Benefit Bank	The Ohio Association of Second Harvest Foodbanks (OASHF)	Volunteer groups set up an Ohio Benefit Bank site by attending a webinar and sending volunteers for trainings to become benefit and/or tax counselors.

Social Marketing

Social marketing is defined as a “process that applies marketing principles and techniques to create, communicate and deliver value in order to influence target audience behaviors that benefit society as well as the target audience,” (Kotler, 2008, p.7). The concept first started to take shape in 1969, when Dr. Philip Kotler, an esteemed researcher and professor of international marketing in the Kellogg School of Management at Northwestern University, along with his colleague Sidney Levy, published an article published in the *Journal of Marketing* titled “Broadening the Concept of Marketing” in which he argued that the strategies employed in commercial marketing could be expanded beyond the realms of business to apply to organizations

working for societal good. Kotler writes, “marketing is a pervasive societal activity that goes considerably beyond the selling of toothpaste, soap, and steel,” (Kotler, 1969, p.10). Two years later, Kotler went on to coin the term “social marketing” in his article “Social Marketing: An Approach to Planned Social Change.”

Since its inception social marketing has been adopted beyond the realm of marketing and public relations by a wide range of organizations as a means promoting their agendas. These organizations include public sector agencies, nonprofit organizations and for-profit organizations as part of a philanthropy effort, both domestically and abroad. Social marketing has been utilized to promote causes related to public health, safety, the environment and community development. Social marketing has not only been utilized to influence the behaviors of a mass audience, but also has been aimed at influencing politicians, activists, media figures and other change agents to induce widespread, long-lasting social change.

Compared to corporate marketing, social marketing is still a fairly new communication strategy, and while there have been numerous instances of social marketing campaigns promoting volunteerism and community engagement, there is not a significant amount of scholarly analysis on the relative success of social marketing within this context and the potential of social marketing as a catalyst for community engagement. Furthermore, previous campaigns have focused on the recruitment of volunteers for a specific cause or activity whereas one of the key elements of *A Call to Action* is the incorporation of social marketing principles to change how the target groups conceptualize volunteering in general, with the goal

being that community groups look at volunteering as the formation of long-term partnerships and not one-time events. Therefore, it is the goal of this case study to serve as a benchmark in the exploration of the expanded potential of social marketing specific to volunteerism.

The ultimate long-term goal of the partnerships formed through the social marketing campaign is to combat poverty in Ohio. The focus areas of *A Call To Action* are a reaction to the vulnerabilities that exacerbate poverty. According to an internal report developed by the Governor's Office of Faith Based and Community Initiatives (GOFBCI), of the one million children who rely on free and reduced lunches during the school year in Ohio, only six percent received free meals over the summer. That same year, according to the report, "Ohioans lost over \$3.7 million to fraudulent businesses," (GOFBCI, 2010, p.10). With the economic recession nonprofits are being asked to provide increased assistance with less resources at their disposal. Therefore, the continued reliance of volunteers is essential in the successful operation of organizations engaged in public service. The goal of the *Call To Action* campaign is to call attention to the current shortcomings in the Ohio welfare system and galvanize public support.

Structure of the Thesis

Before delving into the specific details of the campaign, a literature review will summarize pre-existing research on the process of building organizational capacity, the use of collaboration in a nonprofit setting, both in terms of capacity building and recruiting volunteers, the role of volunteers in community development and the

utilization of social marketing to spur volunteerism. In addition, the literature review will include theoretical perspectives on the use of social marketing in order to promote volunteerism and spur community engagement and the application of social marketing toward that end. Then three communication theories and two development models that are being utilized in the campaign will be defined and shaped into a theoretical framework that will be applied during the development of campaign materials and the overall evaluation.

The summary of the campaign methodology will follow the structure and process of designing a social marketing campaign as described in Dr. Kotler's book "Social Marketing: Influencing Behaviors for Good" and be divided into three distinct phases: the pre-campaign strategy formation and planning, the campaign implementation, and the post-campaign evaluation. The pre-campaign research will focus on the evaluation of the campaign environment, including formative research on Southeast Ohio, an analysis of the strengths and weaknesses of the Southeast Collaborative and similar efforts. In addition, the target audience will be defined and the objectives of the campaign will be summarized as well as the strategies employed to achieve those objectives. Finally, the utilization of the budget will be described.

The description of the campaign implementation will include a detailed timeline of campaign initiatives as well as how the communication theories were applied throughout the campaign. Finally the post-campaign evaluation will analyze changes related to each of the marketing objectives and suggestions for future campaigns will be discussed.

I've served as the Voinovich Scholar in the Regional Nonprofit Alliance throughout the duration of the *Together Ohio* project so before proceeding with the evaluation of the campaign it is important that I first establish my role in the development and implementation of the campaign. My two primary responsibilities connected to the campaign were to assist in the marketing of training sessions by advertising them on the Regional Nonprofit Alliance's website, and to provide administrative support on the day-of training sessions by answering last-minute questions and RSVPs. In order to gather information for the evaluation I attended CEPG Partner meetings, community listening sessions and Partnership Development Institutes, but my only responsibilities at those events were to observe the proceedings and write summaries of what occurred. I did not contribute to the development of the marketing strategy both prior to and after the awarding of the grant. The responsibilities of developing marketing materials, training sessions, and coordinating technical assistance were delegated to other staff members within the Voinovich School. Given my limited role in the campaign, I believe that I have enough relative objectivity to evaluate the campaign.

Chapter 2: Literature Review

The *Together Ohio: Southeast Regional Collaborative* provides organizational capacity building tools, in the form of events, workshops, and training sessions tailored to a wide array of faith-based and community organizations within the region. In order to identify specific focuses of capacity-building efforts the Collaborative conducted a needs assessment that identified four areas of weakness in the region: 1) operations, planning, and board development; 2) fundraising and fiscal management; 3) networking, collaboration, and advocacy; and 4) communication and information technology. Of the four needs areas identified through the assessment, the third area, networking, collaboration, and advocacy, serves as the greatest opportunity to promote partnerships that connect pools of community volunteers with non-profits trying to build their capacity. Ultimately, this capacity-building initiative will help support regional organizations and the crucial health and human services that they provide will be expanded.

The non-profit sector is one of the fastest growing sectors on both the state and national levels and with this growth comes a greater emphasis on increasing the effectiveness of these organizations (Connolly & York, 2002; McPhee & Bare, 2001). In order to increase effectiveness, organizations must identify areas for improvement, allowing for the creation of capacity-building strategies to assist non-profit organizations in fulfilling their missions (Arthur, Bennett, Edens, & Bell, 2003). The *Together Ohio: Southeast Regional Collaborative (Together Ohio)* is an example of this type of capacity-building initiative. Its purpose is to assess the needs of faith and

community-based organizations in the Southeastern Ohio region in order to improve services provided to communities in this fifteen-county area.

Many community and faith-based organizations have not-for-profit, or non-profit, status. Government agencies finance a large portion of social and health services for delivery by non-profit organizations (Fredericksen & London, 2000; Gazley & Brudney, 2007; Herman & Renz, 2000). Non-profit organizations perform more critical social services than ever before (Bradach, Tierney, & Stone, 2008; Hunter, 2006); advancing community well-being, assisting underserved populations, advocating change, and supporting charitable programs across the country. Facilitating the capacity-building efforts of non-profit organizations can improve delivery of these services (McPhee & Bare, 2001). Assisting the efforts of non-profit groups is advantageous, as programs launched by local non-profit organizations often parallel community and neighborhood values (Fredericksen & London, 2000) and engage community members (McPhee & Bare, 2001). Also, local non-profits are typically capable of speedy program implementation, modifying programs to fit individual neighborhoods or populations, and are often capable of reaching clients missed by direct public delivery (Saidel, 1989).

Before discussing the process of organizational capacity building, it is important to clarify the definition of this term. The following section summarizes organizational capacity building and explains how it is tied to service delivery, collaboration and volunteerism. Finally, the process of marketing volunteerism is explored.

Organizational Capacity

Generally speaking, organizational capacity refers to an effort to enhance an organization's sustainability and effectiveness (Sobeck & Agius, 2007). Differing definitions of organizational capacity focus on different aspects of organizations, including the input and output of the organization, services and an organization's capabilities, and staff and volunteers (Sobeck & Agius, 2007). Schuh and Leviton (2006) define organizational capacity as the ability of an organization "to successfully implement and complete a new project or to expand an existing one successfully" (p. 172).

Developing organizational capacity is possible at two different levels (Letts, Ryan, & Grossman, 1999). At an individual level, the skills, knowledge, and expertise of employees and volunteers are enhanced, increasing resources available to an organization. The procedures and structure of an organization is a broader level of organizational capacity influencing the organization's ability to utilize individual resources efficiently. Development and enhancement of resources at an individual level has little impact on program capacity and organizational success if internal structures capable of utilizing these new resources are not in place; an organization's processes and procedures may need altered or developed to take full advantage of individual expertise and training (Schuh & Leviton, 2006). Thus, the first measure of an organization's capacity is determined by the number of employees as well as each employee's skill set and level of expertise.

An organization's ability to use these individual skills is the second measure of organizational capacity, which is altered through formal development of procedures, staff re-assignment, and organization restructuring. Sometimes an increase in organizational capacity is reached by reducing the number of programs supported by an organization, focusing resources on programs central to the organization's mission (Bradach et al., 2008). Organizational capacity can influence program capacity (Schuh & Leviton, 2006). Therefore, capacity building has become a necessary step in supporting non-profit organizations through training, technical assistance, and other resources to ensure that organizations meet their established priorities and successfully implement programs that meet the organization's goals (Sobeck & Agius, 2007).

Networking and Collaboration

Networking is an effective way of building organizational capacity (De Vita et al., 2001; Galaskiewicz, Bielefeld, & Dowell, 2006), and research indicates that the majority of non-profit groups network and collaborate with other organizations (Clerkin & Grønbjerg, 2007). Networking can simply be networking with community and other local organizations, or it can be the processes of "renting" capacity from other organizations rather than building it internally (Sussman, n.d.). For example, organizations can cut operational costs by co-locating in a single office and sharing supplies and administrative personnel.

Research has demonstrated that networking can increase an organization's performance, positively affect political influence, learning, innovation, and even an organization's survival (Galaskiewicz et al., 2006). Networking provides access to

information, assists strategic planning efforts, and can lead to resource sharing between similarly aligned organizations. Networking can also increase the visibility of an organization (Sobeck & Agius, 2007), leading to increased donations and volunteers. Networking is the first level of collaboration, as demonstrated by the chart below. As organizations build increasing trust they can deepen their collaborative relationships (Frey, 2004).

Table 2: Levels of Collaboration

Networking	Cooperation	Coordination	Collaboration
<ul style="list-style-type: none"> • Aware of organization 	<ul style="list-style-type: none"> • Provide information to each other 	<ul style="list-style-type: none"> • Share information and resources 	<ul style="list-style-type: none"> • Members belong to one system
<ul style="list-style-type: none"> • Loosely defined roles 	<ul style="list-style-type: none"> • Somewhat defined role 	<ul style="list-style-type: none"> • Defined roles 	<ul style="list-style-type: none"> • Defined roles with clearly specified tasks
<ul style="list-style-type: none"> • Little communication 	<ul style="list-style-type: none"> • Formal communication 	<ul style="list-style-type: none"> • Frequent communication 	<ul style="list-style-type: none"> • Frequent communication with mutual trust
<ul style="list-style-type: none"> • All decisions are made independently 	<ul style="list-style-type: none"> • All decisions are made independently 	<ul style="list-style-type: none"> • Some shared decision making 	<ul style="list-style-type: none"> • Consensus is reached on all decisions

Adapted From: Measuring Change in Collaboration Among Safety School Partners by Bruce B. Frey et. al, 2004

Marketing Volunteerism

Volunteers are a pivotal resource to community organizations (Cihlar, 2004; Yoder, 2007). When recruiting volunteers, it is important to use marketing strategies

appropriately: emphasize the rewards associated with volunteering, the impact that volunteering for the organization will have on the community, and accurately present the type of work a volunteer will be performing (Cihlar, 2004). It is important to note that volunteer motivations change over time and it is important to evolve marketing strategies to meet these changes, but two consistent types of motivation identified are personal gratification and social responsibility. Shields (2009) writes:

The most effective marketing-oriented strategy for recruiting young adults today would incorporate the two basic and fundamental motivations of helping others, or altruism, and maintaining socially beneficial relationships or some sense of personal development. (p.156)

One way to emphasize the importance of the volunteer in an organization is to create a volunteer job description, which tells potential volunteers what to expect and reinforces the idea that the organization will use their time responsibly (Yoder, 2007). Successful recruitment and retention of a volunteer centers around the volunteer enjoying the contributions they make and feeling like they are fulfilling a unique position.

Social marketing also can play a critical role in volunteer recruitment because it emphasizes the changing of volunteers' attitudes and behavior patterns to match those of the community, but research on the use of social marketing for volunteerism is sparse (Boehm, 2009). Boehm's research does suggest though that social marketing can be utilized to construct the perception that volunteering is a credible and worthwhile social product and that organizations utilizing social marketing can either recruit volunteers then build

a strong positive attitude toward volunteering, or those positive feelings can be nurtured prior to recruitment. In a community setting interpersonal communication is a strong tool to build relationships with individuals and organizations, but a major barrier to this method of communication is time and money need to implement this strategy (Haldeman & Turner, 2009).

In short, the *Together Ohio: Southeast Regional Collaborative* is a capacity building initiative for a fifteen county area in Southeastern Ohio. Social marketing is an effective way to market capacity building through collaboration and spur volunteerism in the region. Ultimately, through capacity building organizations will be able to expand services provided and increase the efficiency of services provided to their communities.

Chapter 3: Theoretical Framework

Three mass communication theories and a combination of two community development models will serve as the foundation for the development of the *Together Ohio* social marketing campaign. The three mass communication theories are framing theory, the diffusion of innovation theory, and institutional theory. The two models from community development literature are organizational development and planned change. These theories and models will influence campaign strategy and community outreach initiatives, will be reflected in the language of all marketing materials associated with the campaign, will shape the content and structure of training sessions, including influencing who is chosen to present at each session, and will be reevaluated during debriefing, ultimately playing a role in determining the effectiveness of the campaign.

Framing

In classical communication theory framing is defined as both “the way in which news content is typically shaped and contextualized by journalists within some familiar frame of reference” and the way in which the audience “adopts the frames of reference offered by journalists,” (McQuail, 2005, p.555). For the purpose of this campaign the traditional definition of framing theory will be adapted so that the Southeast Collaborative assumes the role of the journalist and instead of developing news, the Collaborative will be developing messages for promotional materials about *Together Ohio*. Framing theory comes into play during several stages of the campaign. In the pre-campaign phase of *A Call to Action*, information about the campaign

received from the Governor's office is stripped of its government jargon and reinterpreted in a way that makes it relatable to the target audience. At a basic level this involves simplifying the goals of each focus area within the campaign and the procedure for pledging into shorter, more direct messages to increase resonance with the target audience. This also involves translating the goal of reducing poverty statewide into a snapshot of the poverty issues apparent in Appalachia that this initiative is trying to address. The overarching goal when applying framing theory to the development of campaign messages is to transform what is essentially a top-down approach to spurring volunteerism into a hyper-localized grassroots effort to recruit volunteers interested in lifting their community out of poverty. During the implementation of the Partnership Development Institutes aimed at building capacity through collaborative partnerships between faith-based and community-based organizations, framing will be utilized to portray collaboration as a necessary and effective means to expand an organization's capacity, help an organization achieve its mission, and allow for collaborative groups to become leaders of development initiatives in their community and strong advocates in shaping public policy impacting the populations they serve. This concept of collaboration as a necessary step for nonprofits and faith-based groups will be echoed by presenters and training coordinators to solidify resonance with participating groups.

Diffusion of Innovation

The second communication theory, diffusion of innovation, is classically defined as "the process of spreading any kind of new technical device, idea or useful

information,” (McQuail, 2005). Diffusion of innovation theory plays a role in both the development of the pre-campaign strategy and the campaign initiatives. Effective diffusion depends on reaching out to people who serve as “connectors” in society, meaning they have influence on and relationships with large groups of people (Gladwell, 2002). In order to have immediate community impact the CEPG team will focus marketing initiatives to target community members of influence, including leaders of ministerial associations, executive directors of nonprofits, leaders in student groups and active community members. Within the diffusion of innovation theory, these people serve as change agents, who will adopt the behavior change early, adapt it to match their own desires and those of the community, and ultimately reach out to the community at large (Severin & Tankard, 1992, p.200). Due to limited resources and time, the Collaborative cannot reach out to every community and faith-based group within the target region, but by targeting change agents, information about *A Call to Action* can be passed along through word-of-mouth, directing interested groups back to the Collaborative. Also, after framing theory is utilized to position collaboration as an ideal tactic for community development, training sessions will provide steps for starting and facilitating effective collaborative relationships, with the hope being that as organizations gain a deeper understanding on how to pursue and negotiate partnerships, they will utilize lessons learned and share them with their partners. These future partners, although they did not attend the Partnership Development Institute, will benefit from the knowledge gained through partnering with an organization that did receive support and training. As this trend gets projected

over time and after several successful collaborations have been formed not only will the attitude that collaboration is an effective method of community development spread across communities, but so too will the tools and advice initially provided through the institutes on how to foster effective collaborations.

Institutional Theory

The third communication theory being employed as part of the social marketing campaign is institutional theory, which “considers the processes by which structures, including schemas, rules, norms, and routines become established as authoritative guidelines for social behavior,” (Scott, 2004, p.2). The earliest forms of institutional theory apply to individuals establishing their own sense of structure and value, but later research shifted focus to institutions in organizations because as “social systems” organizations assign value through the determination of goals and procedures (Scott, 1995). This connection between institutional theory and the structure and behavior of organizations serves as the means for the campaign to cement the value of collaboration for community development into organizational missions. During the pre-campaign phase of *Together Ohio*, the Collaborative will seek to understand the current norms, rules and social schemas of collaboration in the region. Then the campaign will attempt to promote a behavioral and attitudinal change in regards to collaboration. Institutional theory lays the framework for the development of the long-term macro-level goal of the campaign, which is to fundamentally change the way service organizations engage in partnerships with other organizations, share resources and recruit volunteers. Following the Partnership

Development Institutes in the spring, which is the capstone of the implementation of the campaign, the goal of the resources provided is to not just have effective collaboration techniques be utilized and shared across a community once, but also to have organizations institutionalize collaboration as a priority by developing a commitment to partnership development within their stated mission and by then making a concentrated and ongoing effort to pursue collaboration with community partners in order to fulfill that mission.

Organizational Development & Planned Change

The final tandem of models within the theoretical framework do not come out of communication theory, but rather come out of literature on trends in community engagement and development. The first model, organizational development, suggests that organizations form in response to specific conditions and needs and are initially change-oriented while structural devices are developed to stabilize the organization and ensure its continued existence (Grosser, 1976). This view is contrary to the “conventional process-oriented approach to organizations, which counsels that organizations should begin slowly with modest efforts, concentrating on internal structural matters,” (Grosser, p.120). Grosser argues that organizations that move away from the process-oriented model of development to the organic model, where resources are diverted to meet specific needs, are able to maximize their resources, increase public participation in the effort and gain support from other community institutions. In the context of his research, Grosser is using the term “organizations” to refer to individual entities, but he alludes to the possibility of a supportive role of other

community institutions toward a specific initiative. Through this campaign the Southeast Collaborative looks to expand upon this definition of organizations to include collaborative community partnerships that mobilize to meet specific needs in the community and are fostered from support offered from community institutions. Once these “organizations” are formed by bringing in diverse members of the community with a vested interest in a single cause, the planned change model can then be applied to spur those organizations into action.

The planned change model in community development serves as a way for organizations united under a common purpose to induce change in their communities. The model refers to a process whereby organizations identify and analyze a change opportunity, design a structured change effort with clear goals and objectives, implement the change effort, and then evaluate the change effort (Daley, Kettner, & Nichols, 1985). The process is similar to the process of designing and implementing a social marketing campaign, with the distinction being that social marketing’s goal is to influence behavior change whereas the planned change model seeks to create more tangible societal changes. There are a number of strengths of the planned change model that make it an ideal blueprint for the campaign. A planned, analytical, and disciplined approach increases the probability of achieving desired results (Daley, Kettner, & Nichols). Additionally, participation of those affected by the needs is built into the model, allowing for dynamic, responsive and democratic interaction. “It is based on interplay between the needs and expectations of a community...and the performance of the agency and its services,” (Daley, Kettner, & Nichols, p.39). In the

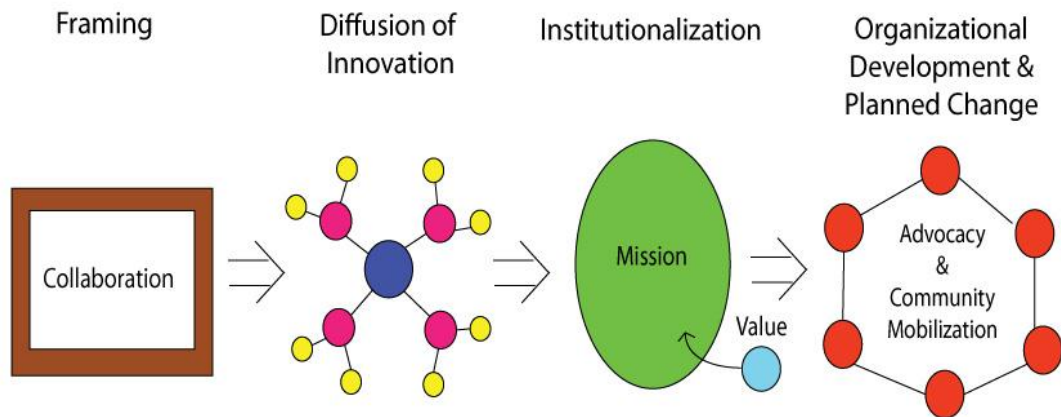
context of the campaign, “organizations” formed through collaboration will have greater access to resources and will be more equipped to address needs specific to poverty alleviation in their community through planned change. Both the organizational development model and the planned change model will be reflected in the language used in marketing materials for the campaign and be emphasized in the Partnership Development Institutes, but those institutes are primarily responsible with providing a strong foundation on which faith-based and community organizations can build these partnerships. The meaningful application of these two models will occur after the completion of the campaign, when organizations utilize the resources provided throughout the campaign to begin building effective collaborations, with continued support and follow-up provided by the Regional Nonprofit Alliance and other members of the Southeast Collaborative.

Application of Theories to *Together Ohio*

In this way the three communication theories and the two community development models provide a blueprint for fostering a collaborative atmosphere in Appalachian communities (a visual illustration for the theoretical framework is provided below). First, framing theory shapes how organizations view collaboration’s role in helping them build capacity and serve their community. Then, after organizations accept the importance of collaboration for effective community development, tools and guidelines provided during training sessions will be utilized and shared with other service-oriented organizations in the communities targeted, representing a diffusion of innovation. As organizations experience success with

collaboration, they will institutionalize the pursuit and development of collaborative partnerships as a part of their mission and prioritize collaboration with other organizations in their communities. After individual organizations make an institutional commitment to collaboration and begin to pursue collaborations, groups with common missions can partner to develop higher-level organizations within the communities served. These organizations have greater access to shared resources and increased capacity, which allows them to take increased ownership of a community's needs and initiate planned change to address those needs. This planned change can take the form of initiatives organized by these collaborative organizations and can also manifest itself through targeted policy development because collaborative groups are stronger advocates for policy changes that address needs in the community. The last steps in this theoretical framework is perhaps the most important because it will allow for the resources provided during the *Together Ohio* process to have long-lasting impact in the communities served well after the campaign is over.

Figure 1: Theoretical Framework for the *Together Ohio* Campaign



As part of the evaluation process the three theories and two models will be analyzed based on how effectively they were employed during all phases of the campaign. Specific attention will be placed on how these theories are reflected consistently and clearly with educational and marketing materials generated as part of the campaign.

Chapter 4: Campaign Environment

The first step in designing an effective social marketing campaign is to identify the social issue the campaign is addressing and to analyze the current extent and causes of the social issue (Kotler, 2008). The *Together Ohio* campaigns aim is to reduce poverty in Appalachian Ohio, so before planning can occur the socio-economic situation in the region needs to be understood.

Formative Research

Despite interventions and measurable improvement, rural Appalachia still stands as one of the poorest and most underdeveloped regions in the country (Thorne, 2004). In 2009 Appalachian Ohio had a poverty rate of 16 percent (compared to 13.5 for the country) and an unemployment rate of 11.8 percent (compared to 9.3 percent for the country) (Appalachian Regional Commission, 2009). Poverty is especially severe for female-headed households with young children (Thorne), in part due to gender discrimination in employment (Latimer & Oberhauser, 2004).

There are a number of factors that have led to the persistence in poverty in Appalachia. Across the Appalachian region unemployment rates exceed the national rate by 2 percent and workers are more concentrated in blue collar professions such as textiles, mining and manufacturing; all professions disappearing from the region (Carrozza & Seufert, 2004). This is in part a reflection of increased globalization with low-skill manufacturing jobs being exported to lower wage countries (Lapping, 2007). Geographic isolation has prevented new industries from being drawn into the region (Sarnoff, 2003). Decreases in farmland acreage since the 1980s has been especially

severe in Southeast Ohio (Ohio State University, 2003). The disappearance of arable farmland has created “food deserts” where members of the communities don’t have access to local fresh produce (Lapping). While homeownership is high in rural regions of Appalachia, lack of accessibility to affordable home financing puts increased pressure on homeowners (Mueller & Twiss, 2004).

Compounding the issue of poverty is disparity in educational attainment, which significantly lags behind similar non-Appalachian counties (Deyoung, Rademacher, & Shaw, 2004). Higher rates of drug abuse, especially alcohol and methamphetamine also serve as a barrier to poverty alleviation (National Opinion Research Center, 2008). High rates of poverty also correlate with a higher prevalence of food insecurity, and Appalachian regions of Ohio have three times the level of food insecurity as the rest of the state, which correlate to higher rates of obesity, diabetes and other chronic diseases (Holben & Pheley, 2006). These health problems create a cyclical poverty trap when coupled with the fact that populations in rural communities tend “to be both underinsured and uninsured at higher rates than urban areas,” (Lapping).

Welfare reform has put increasing pressure on vulnerable groups in Appalachia by creating time limits on benefits, enforcing stricter work requirements and diminishing resources for job training (Badagliacco & Werner, 2004). Remaining federal resources are concentrated in metropolitan areas and those that do reach rural areas take the form of income support programs or subsidies rather than providing for economic development (Lapping). In response to gaps in welfare programs, local non-profits in Appalachian communities have been founded to provide support for

vulnerable groups while combating the wide array of issues associated with poverty, including food security, housing, rehabilitation, education and unemployment.

The goal of the *Together Ohio* campaign is to provide capacity building support and technical assistance to nonprofits so that they can meet the needs of their communities. Support services will be structured specific to shortfalls in current organizational capacity, so it was paramount to gain a deeper understanding of the needs of nonprofits and faith-based groups in the region. Therefore, prior to developing a strategy for implementing *A Call To Action* in the region served by the Southeast Collaborative, the group developed a needs assessment survey (see Appendix A), which was then sent out to organizations and churches within a fifteen county region in Southeastern Ohio (Athens, Belmont, Gallia, Hocking, Jackson, Lawrence, Meigs, Monroe, Morgan, Noble, Pike, Ross, Scioto, Vinton, and Washington counties; see yellow region on map below).

The final component of the survey asked participants to identify areas that their organization would find technical assistance and training to be useful. This final section of the survey also asked respondents to indicate what types of training methods would be most helpful to their organization. Over 1,000 paper surveys were mailed to organizations and churches in the region. Respondents indicated which topics their organization would find training or assistance to be “Very Helpful.” The most popular topic was *developing and implementing a fundraising strategy*. The second most popular topic was *recruiting and managing volunteers*. Respondents identified the methods of training and assistance that their organization would find “Very Helpful.”

Community Engagement Partnership Grant Regions



Training and workshops was the most popular method of delivering training and assistance followed by *expert one-on-one help via in-person meetings*. Full survey results as well as a copy of the survey can be seen in Appendix B.

Based on survey responses, interviews were completed that focus on two of the areas where most organizations indicated training and technical assistance would be very helpful. Organizations that provided contact information on the survey were emailed and invited to participate in short, targeted interviews. After the interviews were completed, qualitative analyses identified trends in the data concerning organizational collaboration and volunteer recruitment and retention. Some common ideas that came up in the interviews were: In both organizational collaborations and

volunteer recruitment, the purpose must be clearly defined. When initiating the relationship, in both collaborations between organizations or recruiting volunteers, personal contact is the most successful method. Commitment is a necessary component of success. Personality conflicts and communication problems are the greatest barriers to success. Based on the results of both the needs assessment and subsequent interviews, the Southeast Collaborative determined that the purpose of the campaign will be to increase regional nonprofit capacity through technical assistance, with a specific focus on building collaborations between organizations. This foundation drove the determination of topics to be covered in training sessions, the form those sessions would take, and the focus on collaboration for the culminating institutes in the spring.

Given the level of poverty in the target region the Southeast Collaborative must first conduct a situational analysis that identifies the internal and external factors relevant to planning efforts. This situational analysis will evaluate the strengths, weaknesses, opportunities and threats (SWOT) relevant to the campaign plan (Kotler, 2008). Strengths and weaknesses refer to the positive and negative internal factors within the organizations developing the campaign that influence the campaign's potential success. This can refer to existing resources, prior experience and even organizational culture related to the campaign. Opportunities and threats refer to external factors, macroeconomic forces outside of the influence of the social marketer that, nevertheless, have an impact on the campaign. These factors can be environmental, economic, political and cultural.

Strengths

The greatest strength of the campaign is that the partners involved have demonstrated the capability to deliver the services advertised through significant past performance. The Regional Nonprofit Alliance already has experience offering free, high-quality, customized training and technical assistance in Athens County so the capacity needed to provide technical assistance is already in place. The Corporation for Appalachian Development (COAD) has been providing leadership development and capacity building services through the Appalachian Leadership Academy and the Community Action Leadership Academy for the past ten years. Sojourners Care Network has spent ten years working with local child welfare agencies and provided leadership and mentoring services throughout the region. The Literacy Center has worked with literary educators to promote financial literacy among both community organizations and low-income populations for twelve years. OUCOM has provided the infrastructure for quality distance learnings, consultation and administration throughout Ohio for thirteen years. In summary, every organization involved in the development of the campaign has experience working in one of the needs areas identified and targeted by *A Call To Action*.

As a result of this previous experience existing resources, research, curriculum, protocols, and channels already in place. The content for the training sessions has already been determined and curriculum partially completed for the first four quarters of group trainings. Finally, through previous work in the region many foundation and community leaders are already in place to efficiently form the Call to Action Advisory

Committee, whose responsibilities are to develop strategies and implement outreach initiatives. All of the organizations involved have community development and poverty alleviation as the foundation of their mission, so these issues are a priority for the partnering organizations, and the campaign does not have to combat competing priorities for time and resource allocation.

In terms of resources the campaign also benefits from an alliance with the Voinovich School, which can provide marketing direction, writing, design, and possible printing on a smaller scale. OU Printing Services can be consulted for larger scale printing jobs. The campaign also has direct management support from the Governor's Office of Faith-Based and Community Initiatives. Within the Governor's Office there are multiple people involved in *Together Ohio* who can provide support and answer questions regarding the initiative.

Weaknesses

The greatest weakness of campaign is that only a limited amount of resources can be utilized to reach the target audience and Appalachia presents unique challenges to maximizing those resources. There are thousands of service organizations that exist in the region and many are isolated geographically. In the absence of a current directory with all of the non-profits and faith-based organizations in the region, there is a lack of funding for determining, accessing, and marketing to the target market, and then providing assistance to every service organization.

Another weakness to the campaign is that because funding is provided from the government, there is a built-in bureaucracy because time needs to be dedicated to specific evaluation and reporting procedures. There is a high level of specificity on

how funds from the Governor's office can be utilized so services provided have to be tailored to reflect the agenda of *Together Ohio*. As a result group training sessions can only be offered once per topic on a single date. Finally, despite previous experience with community development the Regional Nonprofit Alliance and other partners in the Southeast Collaborative have limited experience interacting and collaborating with faith-based organizations. This lack of experience means that more resources need to be diverted to developing partnerships with faith-based organizations that understand that organizational culture and can provide insight on the best practices for engaging them in the campaign.

Opportunities

The greatest opportunity presenting itself to the Southeast Collaboration is that political and economic factors have led to an increased demand for capacity-building support and training related to recruiting and retaining volunteers. Decreases in grant money available for service organizations as a result of budget shortfalls has forced non-profits to prioritize collaboration as a means of maintaining current organizational capacity. The demand for services allows the Collaboration to market the services provided through the campaign without having to rationalize the importance of the services being provided.

There is also an opportunity to extend the reach of marketing initiatives by developing relationships with external publics. The existence of strong ministerial associations throughout the region allow the Southeast Collaborative to reach more churches efficiently. Finally, The existence of videoconferencing equipment offered

through OUCOM and connected to hospitals around the region allow training sessions to be localized, which eliminates long commutes for both the target market and presenters.

Threats

While the campaign is addressing an apparent need in the region, the Southeast Collaborative will face competition from other community volunteer networks, consultants, management service organizations (MSOs) and capacity building organizations that exist in the region and offer similar services. One such example of a competing effort is the capacity building training services offered through the Ohio Compassion Capital Project (OCCP). Another competing capacity-building organization is Love Inc., which has a regional office in the target market area of Chillicothe (Ross County). However, competition is minimal because the target market demand for this type of training is greater than the supply, especially at no cost to the participant with trainings in the immediate area (the target market will not have to commute to training and/or attend multiple day sessions because of existing videoconferencing capabilities).

Another potential threat to the campaign is the cultural differences that exist between secular non-profits and faith-based organizations. Conflicting pedagogies between these two groups could supersede the possibility of collaboration and erode relationships between these groups. One of the factors that has prevented more collaboration between non-profits and faith-based organizations is this differing philosophy and if groups aren't able to set aside ideological beliefs then there is the

possibility that the campaign will not be able to bring the two types of groups to the Institutes. Therefore, it is paramount for the Southeast Collaboration to emphasize that partnerships need to be founded on a single shared goal. Finally, technological forces threaten to hinder the resonance of campaign messages by limiting the number of people that can be reached through the marketing campaign. While videoconferencing allows for training sessions to be conducted in multiple locations, over-reliance on this service leaves the campaign susceptible to technical malfunctions that could cut whole regions out of the session. In addition, Internet services do not reach all areas of the target region so reliance on email as a means of disseminating marketing materials will leave out potential organizations within the target market that could benefit from services provided.

Past and Similar Campaigns

There have been a number of campaigns focused on building partnerships between universities and communities that can serve as a blueprint for the development of the *Together Ohio* campaign. One example of a program designed to foster partnerships between communities and a universities is the Expanding Community Partnerships Program (ECP), which was initiated by the presidents at four universities (West Virginia University, The University of Texas at El Paso, Northeastern University and East Tennessee State University) in 1998. The goal of the program was to develop symbiotic relationships between the institutions and the communities they served. The resounding lesson that came from the program was: “Partnerships are built upon personal and organizational relationships that evolve over

time through an emerging awareness of others' missions and values, and through redefining common assets and aspirations" (Bach, 2004, p.266). In another example at the University of Louisville, government, higher education, businesses and community organizations founded the Housing and Neighborhood Development Strategy (HANDS), to funnel millions of dollars in public and private funds into neighborhood revitalization (Gilderbloom, 1997). Some of the challenges the community faced were limited fiscal realities, competing agendas and minimal organizing skills, but the partnership ultimately succeeded by determining the most pressing needs of the community through surveys and interviews then developing a targeted approach to addressing those needs. In a third and final example at Springfield College three lessons for successful collaborations between universities and communities were identified: 1) Open communication between the community and the college is pivotal to the success of collaborative efforts, 2) Flexible leadership allows for collaborations to evolve and strengthen, and 3) Clear coordination is necessary for all outreach efforts (Lucy-Allen & Seydel, 1999).

Additionally, prior efforts can provide insight on how to best apply social marketing principles to promote volunteerism and spur community development. In one campaign aimed at increasing the recycling rate of a community, the best practices identified were to facilitate convenient adoption for your target audience of the desired behavior, and to utilize interpersonal communication as a means of reaching out to the target audience (Haldeman & Turner, 2009). In another campaign working to recruit older adult volunteers into the public health sector, building initial trust toward the

organization marketing the behavior and utilizing both word of mouth and local grassroots media channels was pivotal in the success of the campaign (Tan et. al., 2010).

Finally, in addition to knowledge gained from previous efforts, the Southeast Regional Collaborative also benefits from insights gained from the other regions of the Together Ohio grant during monthly meetings in which best practices and challenges faced are shared. From these meetings and subsequent interviews the most common challenges identified were difficulties accessing rural communities because of the fact that they were coming from “the city”, difficulties engaging faith-based organizations in the effort, difficulty identifying who to contact within the organizations, and difficulties overcoming political barriers since the initiative was organized by Governor Strickland. Regions that had the most success were able to bridge the gap between community and faith-based groups and enabled these groups to work together, foster interest in *A Call to Action* through their community meetings, and work collaboratively with local colleges to engage students in the volunteer efforts. These parallel and previous efforts provide a framework of best practices that will help the Southeast Collaborative effectively engage its target audience.

Chapter 5: Target Audience and Objectives

The target audience as dictated by the governor's office for the campaign fell into three categories: non-profits, faith-based organizations and community-based organizations. As mentioned in the previous section a comprehensive needs assessment was conducted to determine the focus of the campaign. In addition to determining areas of need the survey also provided information on the composition of the target audience. The survey collected data on organization type (i.e., church, faith-based, membership, and community-based groups), service area, organizational staff, and amount of time organizations had been in operation. The survey also asked organizations about their awareness of the Governor's Office of Faith-Based and Community Initiative's *Call to Action*, the organization's involvement in *Call to Action*, and the level and areas of future interest in *Call to Action*.

Target Market Profile

A total of 129 organizations responded to the survey; the majority (89.1%) of which have non-profit status. Community-based organizations made up the largest portion of responding organizations (52.7%). Faith-based organizations made up the second largest percentage of responding organizations (23.3%). Churches made up the third largest percentage of responding organizations (14.0%). Membership groups made up the smallest percentage of responding organizations (10.1%).

Some common themes revealed in the survey were that the majority of organizations have been in operation for ten or more years (67.0%). Across the different types of organizations, *volunteers* made up close to two thirds (64.0%) of the

work force, *full-time staff* made up about a quarter (28.0%) of the work force, and *part-time staff* made up a small portion (8.0%) of the work force. Most groups (61.9%) reported serving at least two hundred individuals annually. Of the remaining organizations, a small percentage (6.3%) reported providing no direct services to individuals.

The majority of organizations limited their service to the fifteen county area encompassed by the *Together Ohio: Southeast Regional Collaborative*. Athens County received the largest amount of service, with thirty-nine organizations providing services to this county. Within the region, Monroe County received the fewest services, with only seven organizations providing services to individuals within this county. Seven organizations reported providing services to the entire state of Ohio, and two organizations reported that their services stretched into West Virginia. The complete results of the survey can be seen in Appendix B.

The structure of the survey allowed for the segmentation of the target audience across traditional variables, including geographic location and organizational make-up, but also addressed the level of interest in capacity building training and collaboration development, which provided a behavioral segmentation focusing on benefit sought and their readiness to build collaborative relationships (Kotler, 2008). As mentioned in the previous section, there was a strong desire for training sessions, especially with a focus on volunteer recruitment. Ultimately, the survey served as a means of selecting a target audience in that locations of training sites correlate to areas with a higher response rate to the survey. Also, the differing needs and organizational

structures between faith-based groups and non-profits that was apparent in the survey results predicated the need for a differentiated marketing approach in which the language used in marketing materials for each group reflected the needs and cultures of that group.

Marketing Objectives

In defining the objectives of a social marketing campaign, it is important to differentiate between three unique types of objectives: knowledge objectives, belief objectives and behavior objectives. The foundation for the campaign is the behavior objective, the behavior that the target audience is being influenced to either adopt, modify, abandon or reject and the subsequent action as a result of this behavior change. In determining the behavior objective it is important to consider whether it has an impact relative to the purpose of the campaign, is doable for the target audience, is measurable, and reflects an area currently lacking support, but with reception in the target market.

For the *Together Ohio* campaign the purpose of the campaign is to reduce poverty in the region by building the capacity of community organizations. Based on this purpose, the behavior objective of the campaign is for non-profits and faith-based groups to pursue collaborative partnerships with one another and for these partnerships to take a more active role in addressing the needs of the communities they serve. As previously discussed, research suggests that collaborations are an effective way to build capacity and promote volunteerism, which would allow organizations to provide increased services to vulnerable groups in the communities they serve, in turn

reducing poverty. The needs assessment demonstrated that there was not enough collaboration occurring throughout the region, but that there was significant interest in efforts to facilitate the formation of partnerships. Changes in behavior will be measured quantitatively by the number of partnerships formed by the Institutes and by the number of pledges to *A Call To Action*. In addition, qualitative insights of the Institutes gained from participant evaluations and analysis by Collaborative partners will indicate whether the Institutes fostered an institutional dedication to collaboration with participating organizations. The behavior objective proposed shapes the campaign goal, which is to increase the number of collaborative partnerships between faith-based groups and non-profits in Southeast Ohio.

Prior to the target audience adopting the intended behavior and acting accordingly it is important to first provide a foundation for this behavior change by setting both knowledge and belief objectives. According to Kotler, knowledge objectives refer to statistics, facts, information and skills that have been previously unavailable to the target audience, but that they would find motivational based on the environmental analysis (Kotler, 2008). For the *Together Ohio* campaign, the knowledge objective is for community organizations to understand the benefits of collaboration and the steps to building successful collaborative relationships. Belief objectives refer to changes in the target audience's values, opinions and attitudes about the proposed behavior.

The belief objective for this campaign is that the targeted groups believe that collaboration is a necessary and effective way to build organizational capacity and

increase volunteer recruitment. Both the knowledge and belief changes will be evaluated utilizing evaluations immediately after the Partnership Development Institutes and follow-up interviews a few weeks after the completion of the Institutes. The knowledge and beliefs about collaboration post-Institute will be compared to the knowledge and beliefs illustrated in the needs assessment survey and knowledge changes will be evaluated qualitatively and quantitatively.

The goals of both the knowledge and belief objectives are to help the target audience identify risks of the current behavior, realize benefits of adopting the proposed behavior, and accept that they can perform the desired action and that doing so will make a positive difference. Knowledge and belief objectives must address misconceptions about the proposed behavior and convince the target audience that there will be minimal negative consequences from adopting the behavior. The end result is that by overcoming knowledge gaps and influencing pre-existing beliefs, the campaign provides the target audience with enough information to conduct a cost-benefit analysis of adopting the new behavior and then accept the new behavior.

Prior to starting the campaign it's important to identify what pre-existing beliefs on the benefits of and barriers to collaboration exist within the target market so that the Southeast Collaborative can address them during the campaign. Also, it is important to identify competitive factors that threaten the success of the behavior objective. Benefits, barriers and competition within the target audience were identified through the development of the needs assessment and then during the listening sessions.

Benefits

Many organizations identified in the survey that they have pursued collaborative efforts in the past and recognize the benefits of these partnerships. During the interview phase of the needs assessment both faith-based organizations and non-profits reported that collaboration and the sharing of resources allowed organizations to not only achieve their missions more effectively, but also helped them gain greater exposure in the community at large. Groups also reported that through the development of social networks community organizations were able to mobilize quickly to address pressing community needs.

During the listening sessions multiple organizations reported that through effective collaboration they were able to apply for and receive more grant money. This idea that collaboration can lead to the securing of more resources and help struggling non-profits continue to meet operational costs was the most resonant benefit because it focused on an issue that is the primary concern for small non-profits in the region. A final benefit identified through the listening sessions was that collaboration was a way of building a grassroots advocacy force for the unique needs of communities in the region. When developing training tools and presentations for the Partnership Development Institutes in the spring, it will be important to repeatedly highlight these benefits that are already recognized in the region.

Barriers

Early into the campaign the Southeast Collaborative really struggled to get community support for *A Call To Action*, in part because there wasn't a thorough

enough understanding of what barriers to collaboration existed in the region. In order to better identify these barriers five listening sessions were held to identify these barriers. Several knowledge barriers prevented collaboration because groups simply didn't know how to navigate through the relationship-building process. Participants indicated that organizations often do not know what projects are being done by particular agencies and if they are aware of what projects are being done they are left skeptical as to whether or not they are permitted to engage in active help. They also reported experiencing immense difficulty in identifying the specific contact person within each organization that can facilitate the beginning of a relationship. The issue of who is supposed to initiate the lines of communication between faith-based and community-based organizations was cited as a constant challenge. These knowledge barriers highlighted vital educational points that needed to be covered during the Institutes, including the process of developing social networks and identifying key contacts as steps to pursuing a partnership.

There were also pre-existing structural barriers in communities and organizations that prevented collaboration. In many communities there was lack of faith-based involvement in strategic planning and assessment of the community, creating a disconnect where the community-based groups lacked a sense of clarity as to whether they are concurring with the needs of the families within the community. Also, many organizations are bound by the rules and regulations that govern them and many times this creates a barrier in which lines of communication can be drawn and more often than not because of this hindrance organizations give up on establishing a relationship.

Some of the structural barriers identified may be too great to overcome during the campaign, but it is important for training sessions to include a focus on how communities can overcome some of these structural barriers.

Finally, cultural barriers between non-profits and faith-based groups were a common theme in failed collaboration attempts. There exists a level of church anxiety within communities and this anxiety manifests itself in the form of assumptions. These assumptions include that community members must be well dressed or that they must have money to donate to the church in order to receive from the churches. Also, there is a perception of fear among community organizations to partner with faith-based organizations because of fear from proselytization. In order for the campaign to succeed in building meaningful collaborative efforts, faith-based groups must be convinced to move away from a recruitment mentality and be willing to unite around a common need in the community rather than a shared ideological philosophy.

Competition

Earlier, competition in terms of similar efforts in the region were identified, but competition can also refer to competing behaviors and agendas of the target audience. For small community organizations time is a limited resource and these organizations need to balance the priorities of meeting their mission, maintaining organizational capacity, and covering operational costs. While collaborating to increase resources sounds like an ideal situation, territoriality for funding and audiences remains a constant behavior because organizations either don't have the time to devote to identifying potential partners and building collaborations or believe

that the benefits of collaboration are unrealistic. This territorial behavior also poses a major challenge referred to as the “silo” effect. Organizations are more concerned with the “credit” their agency receives for providing a particular service rather than coordinating efforts between agencies. Along that same vein, the faith-based representatives reported that there is a significant amount of competition between services for the aforementioned reasons as well. In order to overcome these competing beliefs and behaviors, the Partnership Development Institute cannot simply focus on best practices for building partnerships, but must also include real, tangible examples of successful collaboration to convince organizations that this is a worthwhile endeavor.

Chapter 6: Campaign Strategies

After gaining a deeper understanding of the campaign environment, identifying the target audience and their motivations, and establishing concise objectives for the campaign, the final step of the pre-campaign planning process is developing a comprehensive campaign strategy that describes a clear course of action. As already emphasized the goal of the campaign is to sell a specific behavior, so the goal of the campaign strategy is to identify specific aspects of the campaign implementation that facilitate the adoption of the behavior.

There are four specific aspects of conducting a social marketing campaign that make up the campaign strategy: the products advertised during the campaign, the price incurred by the target audience to adopt the behavior, the place the campaign will occur, and the promotion materials and methods utilized to reach the target audience. Collectively, Kotler refers to these aspects of the campaign strategy as “the four P’s,” (Kotler, 2008). The following section will further define each of the four aspects of the marketing strategy and describe the specific strategies employed for the *Together Ohio* campaign.

Product Strategy

The product strategy refers to the production and distribution of a physical good, service, experience or event that assists the desired behavior adoption. When defining the product platform of a campaign it is important to differentiate between the core product, the actual product and the augmented product. The core product refers to the potential benefits of behavior adoption that should be stressed during the

campaign. The actual product in a social marketing campaign is the specific behavior being promoted and the sponsor of the campaign. Finally, the augmented product refers to any additional tangible services that play a role in the campaign. Augmented products can help remove barriers to adopting the desired behavior, sustain the desired behavior, and provides an opportunity to “brand” the campaign, increasing the memorability of the campaign (Kotler, 2008).

In the previous section, existing knowledge and beliefs on the benefits of collaboration were described. To determine which benefits should serve as the core product of the campaign the Southeast Collaborative identified the benefits that seemed to resonate most with the target audience. The primary benefit expressed during the listening sessions was that collaboration was essential for self-preservation in the service sector both in terms of acquiring funding and achieving an organizational mission. A secondary resonant benefit was that through collaboration service organizations can take a leadership role in their community’s development. Both core products will be stressed throughout the campaign.

The actual product is synonymous with the behavior objective defined in the previous section as well: for non-profits and faith-based groups to pursue collaborative partnerships with one another and take a more active role in addressing the needs of the communities they serve. The sponsoring organization is the Governor’s Office of Faith-Based and Community Initiatives and will be featured in all promotional materials.

Finally, the augmented products advertised during the campaign are the capacity-building services, including regional trainings and individualized technical assistance offered to organizations in the target market. An additional component, the regional *Call to Action*, will educate community organizations and faith-based groups about the need for community volunteers in key areas.

Price Strategy

The second part of the campaign strategy is the pricing strategy, which includes monetary and non-monetary costs associated with adopting the behavior. The overall goal of the pricing strategy is to create financial incentives that with either increase the benefits or decrease the cost of participating in campaign events and adopting the desired behavior. As directed by the Governor's office, all services provided as part of the campaign will be free of charge for participating organizations, which eliminates any monetary cost for the target audience. Therefore, the focus of the pricing strategy is the non-monetary costs incurred.

The main events of the *Together Ohio* campaign are the Partnership Development Institutes in the spring, which require organizations to invest time and energy to attend these events. To provide an incentive for participation in these Institutes, the Southeast Collaborative is providing free lunch. Also, at the Institutes participating organizations will be provided with materials that help them develop social maps, identify potential partners, and navigate the formation of these partnerships. The goal of these tools is to challenge the assumption that pursuing partnerships requires too much time and effort for a small non-profit or faith-based

organization. In other words, these tools decrease the non-monetary cost of pursuing the desired behavior.

Place Strategy

The third step to developing a campaign strategy is to create a place strategy that emphasizes maximizing the convenience for the target audience to receive services and adopt the behavior. The southeast region, as defined, by the Governor's office, includes 15 rural counties in Southeast Ohio: Athens, Belmont, Gallia, Hocking, Jackson, Lawrence, Meigs, Monroe, Morgan, Noble, Pike, Ross, Scioto, Vinton, and Washington. One of the early challenges of the campaign was to determine the best way to provide services throughout this region with limited resources, and to address this challenge the Southeast Collaborative utilized several strategies. Sites for both listening sessions and Institutes were chosen in part so that they were in closer geographic proximity to different clusters of counties in the region. This eliminates the psychological barrier that participating in events associated with the campaign is inconvenient. It also allows for services provided to reach groups across a larger geographic area.

The Collaborative also plans to utilize existing distribution channels by holding events where non-profits already seek and receive services. Listening sessions and Institutes will be held in venues that were easily identifiable by organizations in each community, including libraries and regional offices for the Ohio Department of Jobs & Family Services and the Family and Children First Council. Through partnerships with these venues the Collaborative can gain access to local organizations

connected to the venues and establish some credibility to help overcome the stigma associated with being an “outsider” to the communities served.

Promotion Strategy

The final “P” that makes up the marketing mix is the promotion strategy. The goal of the promotion strategy is to highlight the product’s benefits, features and other tangible objects or services of the campaign. The promotion strategy consists of four components: the messages the campaign is communicating, the messengers that will deliver the message and be perceived as the sponsor of the message, the creative strategy that translates the desired message into specific communications, and the communication channels used to disseminate information about the campaign. This final section will detail the four components of the promotion strategy for the *Together Ohio* campaign.

The message of the campaign is a clear and concise statement on what the target audience is supposed to know and do. The action the campaign is encouraging is the formation of partnerships between non-profits and faith-based groups and, building off of the knowledge objective from the previous section, the Southeast Collaborative wants organizations to know that partnerships are key to building strong communities and combating poverty. Taking this foundation a step further, part of creating a cohesive message is developing a positioning statement for the product offered. The goal of this statement is to organize the actual and perceived offerings of the campaign so that they fall into a specific place in the target audience’s mental and perceptual map (Kotler, 2008). In other words, the positioning statement will highlight the most

resonant benefits of the proposed behavior and distinguish the behavior as more important than competing behaviors. There is already an expressed interest in the target audience of the *Together Ohio* campaign to pursue collaboration, but one of the recurring questions is: In an environment with limited resources, why should collaboration be an organizational priority? Therefore, the Southeast Collaborative determined that it would be most effective to utilize a benefit-focused positioning statement that speaks to the individual gains of organizations effectively forming partnerships. The positioning statement for the campaign is: Collaboration is a necessary and effective skill for service organizations, and groups that utilize partnerships have greater access to resources, can reach a larger audience and, as a result, can provide more assistance to their community.

There are two unique messengers perceived by the target audience for this campaign. The first and most prominent messenger is the Southeast Regional Collaborative (and corresponding partners) that serves as the local support for the facilitation of training sessions and technical assistance. It's important to distinguish each of the partners that make up the Collaborative because these organizations have an existing relationship with the communities and organizations are more familiar with the services provided by these organizations than with the aims of the newly formed Collaborative. The second messenger emphasized is the Governor's Office of Faith-Based and Community Initiatives (GOFBCI). While this office does not directly interact with organizations until after they've made a pledge to the *Call to Action*, as

the primary source of funding the office dictates the scope of the work and is acknowledged.

One of the major barriers identified in the pre-campaign research was that small community organizations were weary of “outsiders” dictating best practices without any understanding of their community’s unique needs. The goal of the creative strategy then is to give the campaign a more personalized tone and frame the campaign and Collaborative as a local effort. To meet these aims two strategies will be employed to advertise services associated with the campaign. First, marketing will rely on a direct mail campaign and utilize personalized letters that emphasize the needs expressed by the two main target audiences. Community-based letters will emphasize volunteer recruitment and building capacity to help non-profits carry out their mission (see Appendix E). Faith-based letters will focus on how through participation in listening sessions and Partnership Development Institutes churches can become more active in providing assistance and promoting development in the communities served. The second strategy to overcoming the “outsider” stigma is to partner with local United Ways and have them assist with the recruitment of organizations for training sessions in their community, ensuring that organizations are receiving information about services provided from a trusted source.

In addition to the letters described above, the Collaborative plans on utilizing a number of other printed materials to advertise the campaign, including brochures and flyers highlighting the three unique technical assistance vehicles and postcards with basic program information (see Appendix D). These flyers will be included with the

letters in the direct mail advertising sent to organizations. In addition, flyers will be handed out at all of the training sessions throughout the *Together Ohio* campaign. Local newspapers, including the Athens Messenger (Athens County), the Gallipolis Daily Tribune (Gallia County), the Portsmouth Daily Times (Scioto County), the Marietta Times (Washington County), the Chillicothe Gazette (Ross County), and the Jackson County Times-Journal (Jackson County) will also be sent public service announcements (PSAs) and updates for their community events calendars. Training sessions will also be advertised via electronic media, with web site postings on the Voinovich School site, the Nonprofit Alliance site, the GOFBCI homepage and other partnering organizations' sites. Events will be posted on the WOUB online calendar and advertised on the Voinovich School's Facebook page. Finally, information on events will be spread by word-of-mouth through existing networks with the Voinovich School, the OU College of Osteopathic Medicine, the OU Literacy Center, the Corporation of Ohio Appalachian Development (COAD), and Sojourners Care Network networks. The Regional Nonprofit Alliance's will also utilize their network of community foundations (Sugar Bush Foundation, Athens Foundation, Appalachian Ohio, Marietta Community Foundation, etc.), Campus-Community Engagement Offices, and nonprofit contact listings.

Chapter 7: Campaign Budget and Funding Sources

Funding for the *Together Ohio Community Engagement Partnership Initiatives* is provided through a grant awarded by the Governor’s Office of Faith-Based and Community Initiatives and funded through the Ohio Department of Jobs and Family Services (ODJFS). The funding can be sub-divided into two forms of funding: direct funding provided on a monthly basis as reimbursement for incurred costs specifically for *A Call To Action* initiatives and match funding provided from the parnters without reimbursement to cover additional programmatic costs associated with the project. The grant was designed to only cover a portion of the costs related to the project and it was the responsibility of the partners to match the funding provided by ODJFS up to twenty percent. To achieve this goal, staff salaries as well as travel costs for presenters was categorized as match funding. Overall, the Southeast Regional Collaborative was awarded \$282,858 for direct costs and \$62,642.77 for match funding. A budget of how funding will be utilized is depicted in the charts below:

Table 3: Summary of Direct Costs

<i>Category of Expense</i>	<i>Amount</i>	<i>Description of Use</i>
Personnel	Total: \$ 175,812 <ul style="list-style-type: none"> • Quarterly Trainings (\$25,039.20) • One-on-One Technical Assistance (\$54,517.05) • Call to Action Outreach Strategy (\$28,007.40) • Program Evaluation (\$19,900) • Regional Needs Assessment (\$21,700) 	Funding to cover salary and benefits for faculty, professional staff and one graduate assistant in the three Ohio University units included in the Southeast Collaborative Personnel will help deliver quarterly trainings, provide one-on-one technical assistance, design and implement the <i>Call to Action Outreach</i>

	<ul style="list-style-type: none"> • Program Work Plan (\$4,608.35) • Project Management and Oversight (\$22,040). 	Strategy, conduct a program evaluation, implement a regional needs assessment, develop a program work plan, and provide project management and oversight.
Contractual	<p>Total: \$93,596</p> <ul style="list-style-type: none"> • Corporation for Ohio Appalachian Development (\$56,560) • Sojourners Care Network (\$19,160) • Doug Shamblin, Community and Faith-based Outreach Specialist (\$7,000) • State and national consultants (\$10,876) 	<p>Funds paid used to pay subcontractors and consultants needed to complete the proposed scope of work. Subcontractors will play a critical role in delivering quarterly trainings, providing one-on-one technical assistance, conducting a regional needs assessment and contributing to the development of a program work plan.</p> <p>Additional funding is reserved to hire state and national consultants to assist in the development of quarterly trainings and delivery of tailored technical assistance services as organizational needs dictate.</p>
Other	<p>Total: \$13,450</p> <ul style="list-style-type: none"> • Telephone costs (\$950) • Print Materials (\$3,500) • Postage (\$1,500) • Training Sessions (\$300) • Videoconferencing (\$7,200) 	<p>Funds used to cover:</p> <ol style="list-style-type: none"> 1) Telephone costs related to Providing technical assistance, implementing the Call to Action Outreach Strategy, and conducting qualitative phone interviews conducted as part of the Regional Needs Assessment and Program Evaluation, 2) Produce print materials required for the quarterly training sessions, one-on-one

		<p>technical assistance, and Call to Action strategy</p> <p>3) Postage required to disseminate a regional needs assessment survey of nonprofit, faith-based and community-based organizations.</p> <p>4) Costs (e.g., room rental costs) associated with conducting training sessions.</p> <p>5) Cost of the video conferencing connection.</p>
Total:	\$282,858	

Table 4: Summary of Match Funding

<i>Category of Expense</i>	<i>Amount</i>	<i>Description of Use</i>
Personnel	<p>Total: \$35,577.77</p> <ul style="list-style-type: none"> • Southeast Collaborative Program Director and the Executive Director of the Ohio University Literacy Center (\$17,963.67) • Full-time graduate student (\$17,614.10) 	<p>Matched to cover salary and benefits for Ohio University faculty and a graduate assistant. This will cover a portion of time for the Southeast Collaborative Program Director and the Executive Director of the Ohio University Literacy Center as they develop, deliver and oversee deliverables included in this scope. The Collaborative will also provide as match a full-time graduate student for the duration of the program period.</p>

Graduate Assistant Scholarships	\$13,065	Used to cover the cost of a tuition waiver required to hire a Graduate Assistant to work on this project.
Volunteers	\$14,000	Provided in match through the use of Master of Public Administration practicum students who will support training workshops, technical assistance delivery, assist in Call to Action community organizing activities, and help collect and analyze data through the proposed Regional Needs Assessment.
Total:	\$62,642.77	

The total budget for the project is \$345,500.77. The budget does not account for the cost of additional supplies because the Voinovich School will provide supplies at no charge. As mentioned earlier funding to cover direct costs will be provided through monthly disbursements from the Governor’s office and monthly budgets must be structured so that the total amount of funds is equally divided between months as opposed to either front-loading the budget to cover start-up costs or back-loading the budget to cover evaluation costs.

Chapter 8: Campaign Implementation

The original outreach strategy designed by the Southeast Collaborative (see Appendix C) called for the formation of a subcommittee representing organizations throughout the region engaged in work related to *Call to Action (CTA)* priority areas. The Collaborative was specifically targeting faith-based organizations to serve on these advisory committees because one of the priorities of the Governor's office was to engage these groups in community initiatives. There was a general consensus that there was a lot of potential for community mobilization with the assistance of churches, but that this potential had yet to be discovered because these groups hadn't been fully engaged in the past. The two responsibilities of the subcommittee were to provide guidance with the development of the CTA strategy and to facilitate the formation of local organizing teams (LOTs) to hold town halls throughout the region and get groups to pledge to one of the *A Call To Action* priority areas.

Early into the process of forming the CTA Subcommittee it became increasingly apparent that the CEPG partners could not overcome the apprehension in the faith-based community and engage groups to serve on the Subcommittee. Feedback from the few faith-based groups that did provide guidance in the development of the CTA strategy suggested that prior to actively recruiting in the community it was important for the CEPG partners to identify and address the barriers preventing participation from the faith-based community. In addition, it was important to establish a more direct presence in the communities we were reaching out to by actually sending members of the Southeast Collaborative into the community. In order

to achieve these goals the Collaborative abandoned the original CTA Strategy and instead opted to identify specific community needs by holding listening sessions in different communities in the region.

Listening Sessions

Based on recommendations from the Southeast Regional Collaborative CTA Subcommittee, five Listening Sessions were held across the fifteen-county region to introduce *A Call to Action* and to determine the barriers to collaboration so that the group could create meaningful content for the three Institutes to be held in the spring. These listening sessions were advertised through two distinct letters, one for faith-based groups and one for community-based groups (see: Appendix E), which were mailed to organizations identified from the original survey database within the proximity of the listening session sites. These letters were mailed out in the beginning of October. It is during these listening sessions that partnerships began to form and were asked to pledge to *A Call to Action*. All of the listening sessions were an hour long and consisted of first showing a promotional video on *A Call to Action* provided by the Governor's office and then opening the floor so that organizations can share their experiences, challenges and perceived barriers associated with collaboration and volunteerism.

The first listening session was held in Marietta on November 2, 2010. Nineteen individuals attended listening session, six of which represented faith-based organizations and thirteen represented community-based organizations. There were several parallels between the missions of the participating organizations and the focus

areas of *A Call to Action*. Multiple organizations are running and maintain a food pantry site within their community. Financial literacy was also an area in which community organizations were just beginning their intervention.

During discussion it became apparent that few community-based organizations had actually made the bridge between faith-based organizations and the community. Faith-based organizations realized the importance of developing a relationship with the community to allow the community to understand motivations behind the faith-based groups. Challenges expressed about volunteer recruitment included a lack of volunteerism and the lack of capacity to actively recruit new volunteers. A representative from a faith-based organization reported having a plummeting volunteer base because their volunteers were all primarily retired older individuals who due to medical reasons have retracted from much of their volunteer work. Faith-based organizations also reported a lack of male presence within their volunteer base. The greatest areas of improvement identified by participants were developing the capability to identify the key contact person within organizations and developing communication skills that would enable them to reach the entire community and relay information that they are providing a service open to everyone.

This session validated the initial belief that the bridge between the faith-based organizations and community organizations was often not realized due to a lack of communication. This was demonstrated by numerous participant comments claiming that they are ready and willing to participate in collaboration, but lacked the necessary lines of communication to reach the proper contact person. The faith-based

organizations addressed the common assumption that many community groups go about contacting the pastor/preacher of ministries under the assumption that those individuals are responsible for community outreach. The reality that emerged through discussion was that many times this could be the worst individual to contact because the information is often lost among many things on the desk of the pastor/preacher. This session also revealed that faith-based organizations were focused on providing services for individuals and were not as focused on inter-organizational development. Overall, Marietta appeared to be a community rich with public service organizations and the willingness to collaborate was seen when after the session ended individuals from organizations were seen talking and exchanging information.

The second listening session was held in Athens on November 4, 2010. Fourteen people representing eight community-based organizations and three faith-based organizations attended the session. Of these organizations one organization hosts a summer food service site.

During discussion attendees indicated that collaborative efforts in the past have been very positive and have shown obvious positive results for the community, including securing grants and federal funding. Participants also indicated that in a rural area collaboration was difficult due to logistics, but that the recent disaster has heightened the need for collaboration. When discussing volunteer efforts in the community it became apparent that volunteer recruitment remains an issue as volunteer plateau is quickly becoming a problem and the base of volunteers is diminishing. As a result, there is a struggle to fulfill missions with low volunteer

turnout. Retention was also identified as a problem because the rules and regulation stipulate such mandatory processes such as background checks, which can be a lengthy process that deters people. From the discussion the greatest areas of improvement identified were devising new methods for volunteer recruitment and engaging those individuals in the community not previously approached.

Throughout this session it was clear that the organizations wanted to create collaborative relationships that would be long-lasting and, more importantly, use the limited amount of regional resources in the most efficient way. Participating organizations emphasized that, due to the unique nature of the southeast region of Ohio, face-to-face introductions and meetings are many times the most beneficial means of accomplishing collaboration. Additionally, many participants indicated that Hocking County, an adjacent county, has a resource manual that includes all organizations and programs being conducted throughout the county and how a composition of this sort would be extremely helpful to Athens County.

The third listening session was held in Chillicothe on November 8, 2010. Ten people attended the session, representing six community-based organizations and one faith-based organization. One organization hosted summer camps for at-risk youth and several others expressed a limited interest in financial literacy and re-entry programs.

During discussion groups identified that years ago an agency coordinated a “Faith-Based Symposium” (about 50 churches in attendance) to share what everyone was doing and provide more well-rounded service in the community (e.g. many churches were providing meals on the same days and coordination was needed so that

folks could eat for multiple days, not all day on one day of the week). Although this was reported as a general success, the network integrator did not have the time or resources to conduct follow-up, so the initiative dropped off significantly after the first year. One lesson that came out of this symposium is that there is a faith-based “art” when working one-on-one with individuals and that their passion for this work helps to address social problems. From this feedback it became apparent that follow-up was essential for developing collaboration and that collaborations with faith-based groups need to emphasize their ability to engage individuals. One challenge reported was a lack of coordination among agencies. Due to the lack of coordination, agencies have witnessed clients ‘abusing the system’ while others receive nothing. In addition, there was an overall sense that the community is facing low volunteer engagement and community support and that the economy is not only affecting individuals, but nonprofit organizations and faith-based groups as well. One organization reported challenges with recruiting and retaining volunteers because of the difficulty in delegating responsibilities. The organization has so many needs that it becomes difficult to engage volunteers in a particular area of work. A unique challenge for the region as identified by the group was the drug problems facing Chillicothe specifically and Ross County generally.

From the session it became clear that while organizations want to work together, there are two major factors limiting collaboration: The first is the “Silo Effect”—organizations are lost in their own work and this limits both collaboration and communication. This “Silo Effect” contributes to the lack of coordination and

knowledge sharing among organizations. Secondly, competition appears to be very blatant within the faith-based community. Although the Faith-Based Symposium helped to mitigate this issue for a time, a lack of follow-up proved problematic and ultimately led to a failure of the initiative. In order to create meaningful content the Institutes must address how to overcome the “Silo Effect,” how knowledge can be better shared between organizations and sectors to improve service delivery, what are the elements of a successful network, and what might a collaborative effort look like that sought to re-engage the community.

The fourth listening session was held in St. Clairsville on November 9, 2010. Fifteen people attended, nine of which were from one organization (including the Executive Director). There were no faith-based groups in attendance at this session. Overall, two organizations were represented in the group. These organizations were working on both Ohio Benefit Bank and they already host a Summer Feeding Program.

Two faith-based/community partnerships were mentioned during the discussion and were reported to be very successful with no challenges. In addition, there is a network of nonprofit groups in the county (called Interagency) that meets monthly to network and share activities and programs with other agencies. One participant noted that this is a network of street-level workers that can assemble and share successes and difficulties they are experiencing without the Executive Directors coming in and “muddling it up”. In terms of faith-based collaboration, there are inter-denominational councils that serve individual cities in the county and each council

will occasionally work together on a project or initiative to serve the community. Interagency assembles a resource guide of services available in the community and it is distributed to participating organizations as a helpful referral tool. Participants pointed to Prisoner Re-entry as an area for improvement in terms of services provided, as well as an area of potential partnership with faith-based organizations. Participants said that they didn't know how to start that process or partnership, but that it would be nice to help integrate prisoners back into the community and reduce recidivism.

The session presented unique challenges gaining insight on community efforts and challenges from participants who seemed very resistant to knowledge sharing. This was in part a result of the fact that a majority of the participants came from one organization and the Executive Director was present in the session, causing street-level workers to be uncomfortable sharing challenges with their superior present. There were also no faith-based groups in attendance; this severely cripples collaborative discussion about cross-sector partnerships, as well as representation of both sector's perceptions. Finally, participants seemed proud of their community's collaborative efforts as a whole, pointing specifically to Interagency and the Council of Churches. Unfortunately, although organizations are working very well together within their respective sectors, there seems to not be much inter-sectoral collaboration.

The fifth and final listening session was held in Ironton on November 15, 2010. There were only two people in attendance, both representing the same civic organization. Discussion focused on the experiences of the organization in developing partnerships. One tenant of the civic organization in attendance is community service.

At least once a year, the organization participates in mostly informal community service—helping people out with their gardens, working with churches to help provide memorial services, or just helping churches generally if they hear the church is having troubles. In addition, community churches banded together to help out an organization in town meeting the needs of the homeless, needy, etc.

There were two main challenges presented in the discussion. The first was that there is a resistance in the area to people representing higher education. There is also a “rugged individualism” in Lawrence County and a sense of sticking to the way things have always been done, and any attempts to challenge the status quo would be viewed as a threat. Despite these challenges, one participant noted that if we were able to bring folks together into one room, we could get folks talking in a way that could facilitate the creation of lasting partnerships. From the way the comments were presented, it seemed as though the same involved citizens were a part of many organizations in Lawrence County generally and Ironton specifically, and if we could contact those ‘key’ community members and get them on board, we could have success there.

Analysis of listening sessions prompted the recommendation that for the teaching institutes in the late spring the topic of volunteer development and volunteerism would be substantially important to these organizations. Additionally providing assistance to organizations to build their capacity needs to involve helping them better evaluate and discover the proper contact person within other organizations. Based on the feedback received during the listening sessions the

members of the Southeast Collaborative decided to host Partnership Development Institutes in Marietta, Ironton and Athens because these sites expressed the greatest need for collaboration and demonstrated the greatest willingness and readiness to pursue partnerships between faith-based and community organizations.

In addition to facilitating the listening sessions, CEPG partners continued to seek pledges from organizations on an individual basis by targeting specific organizations through email and at other training sessions related to the grant. From a political standpoint the securing of pledges was the main priority of CTA initiatives because that was the predominant quantitative measure of success dictated by the Governor's office. This priority was balanced with the team's priority of creating sustainable partnerships in the community and bridging the divide between the faith-based and non-profit communities.

Then when there was a regime change at the Governor's office in November, there was a lot of speculation on whether or not funding for the project would get cut. Ultimately, funding was never cut, but the doubt on the future availability of funds cast by the Strickland administration as a precautionary measure forced the CEPG team to consider how to move forward with the project and fulfill promises made to communities during the listening session without funds. The CEPG partners voted to move forward with the Partnership Development Institutes with each partner providing funding and resources to facilitate those institutes. The group also determined that under the theoretical possibility that funding could get cut, focus should be diverted away from the securing of pledges and toward the development of

Institutes that more closely reflected the goals of the team to build sustainable partnerships. This remained the mindset of the group even after notice was given in January that funding would be continued throughout the duration of the grant.

Partnership Development Institutes

Prior to the planning and scheduling of the Partnership Development Institutes there was a desire within the Southeast Collaborative to develop a simple analogy that could serve as an ongoing thematic framework for the process of creating collaborative partnerships and would be easy to understand for the target audience. The partners decided that the best analogy was that forming a collaboration is synonymous with the dating process. Initially, both types of relationships begin with an “ask,” where an interested party approaches another about potentially forming a relationship. This ask is followed by a first date, which in the collaborative process is the time when organizations gain a deeper understanding of their potential partner’s capacity, mission and initiatives in the community. If there are common goals that can serve as the foundation for a partnership, the courting process continues and in some instances become permanent partnerships (synonymous with marriage), while in other situations organizations aren’t compatible and attempts at collaboration are abandoned.

This analogy provided a relatable framework for the target audience to conceptualize collaboration and shaped the structure and goals of the Partnership Development Institutes. The morning session of the Institutes would be used to sell the concept of collaboration and frame the pursuit of partnerships as an easy and effective

way to build organizational capacity. The goal of this session was to encourage organizations to make the “ask” and begin to pursue collaborative relationships with different types of groups (i.e. non-profits with faith-based groups and vice-versa). Then the afternoon session was utilized to address previous failed experiences with forming partnerships and, more importantly, to provide one-on-one coaching for groups based on where they were in the dating process. Organizations invited to the Institutes were encouraged to bring a potential partner, but for those organizations that attended alone the afternoon was utilized either to help them identify other organizations in their community they want to approach through the construction of a social map (see: Appendix G), or allow them to pursue first dates with other organizations participating in the Institute. For organizations that did bring potential partners the afternoon was used to brainstorm how to move forward with the partnership. This consisted of identifying specific initiatives to rally around, drafting the preliminary structure of a Memorandum of Agreement (MOA), or simply to set up an opportunity for continued discussion.

With these goals in place the Southeast Collaborative was able to create an agenda for the Institutes (see Appendix F). All three institutes began with Rich Games, Executive Director of Sojourners and a CEPG Partner, introducing the grant and describing the foundation of the Institutes, emphasizing the dating metaphor described above. Rich then introduced the guest speaker for the Institutes, Kent Spellman, Executive Director of the West Virginia Community Development Hub. The Hub serves as an incubation center for collaborative initiatives between non-profits,

government agencies and universities in West Virginia and utilizes performance-based coaching to help facilitate the development of these partnerships. Kent was chosen as the primary presenter for the Institutes because of his experience with The Hub and also because of his familiarity with working in Appalachia and the unique challenges that environment presents.

Kent began each of his presentations by having participants introduce themselves, their organization and the greatest challenges they were facing. The goals of this process was for organizations to begin to identify other organizations with similar challenges and set the stage for how collaboration can address those shared challenges. After introducing The Hub and several initiatives incubated, Kent's presentation covered several main themes. He discussed how the non-profit world is in a state of transition from a mechanistic model driven by structure to a greater emphasis on leadership and performance and that organizations that do not achieve their stated mission will fall to the wayside. He also addressed some of the major barriers to collaboration, including turf-sensitivity and case-driven logic where assumptions of failure are made before partnerships are pursued. Therefore, the first step in the collaborative process, Kent argued, was to make collaboration a priority and create a culture of collaboration by including people within the organization who are dedicated to it and excluding those that are barriers to the pursuit of partnerships. He also emphasized that in a collaboration each organization must bring something to the table because connections flow to value, a concept that challenges the traditional top-down network where value flows from above. Kent then shifted focus to the

potential benefits of collaboration, specifically emphasizing that funders flock to meaningful partnerships, that collaborations grow organizational capacity and serve as a way to operate more efficiently, and that effective partnerships are a strong collective voice on policy and community development. Kent concluded each presentation by discussing different forms collaboration can take and offering steps to the formation of a partnership.

Following Kent's presentation organizations were served lunch and encouraged to begin networking with other organizations in attendance. After lunch, participants reconvened and a panel discussion was held during which panelists shared best practices for forming partnerships and answered lingering questions. For each institute a different group of panelists was utilized based on availability. The final session for the Institutes was an opportunity for groups to begin to create the foundation for partnerships with the support of CEPG team members in attendance. Groups were provided with a worksheet (see Appendix G) that helps them develop a social map and brainstorm potential partners. At the conclusion of each Institute participants were encouraged to follow-up with the Regional Nonprofit Alliance for any continued support in facilitating partnership development.

The first Institute was held in Marietta on April 8, 2011. There were twenty participants representing fourteen organizations: one faith-based group, one representative from Marietta College and twelve non-profits. An overwhelming majority of the organizations had missions related to food security and health. During introductions the major challenges expressed related to fundraising, volunteer

recruitment, grant writing, and strategic planning. The afternoon panel discussion was headed by Mary Woodward, President of Ohio Volunteer Organizations Active In Disaster (VOAD), Robin Stewart, a CEPG partner and policy and research associate at the Voinovich School specializing in economic development, and Bob Gordon, a Voinovich staff member and project manager. During the discussion panelists emphasized the importance of developing an agreed upon structure for communication detailing how messages will be relayed, when messages will be sent out and what the responsibilities of each partner was for effective communication. In this same vein, emphasis on adopting and utilizing social media as part of a communication plan was encouraged.

The greatest shortcoming of the first institute was that, although groups had provided brief introductions at the beginning of the day, when it was time for groups to make concrete steps to plan collaboration opportunities everyone had forgotten who else was in the room. This was in part due to the fact that members of the CEPG team did not emphasize that lunch should also be utilized as an opportunity to network .The other problem was that during group introductions groups weren't asked to specifically identify specific needs their organization had and what capacity they could offer in a partnership. As a result, the time in the afternoon designated for collaboration brainstorming, social mapping and "first dates" was instead used for each group to identify their needs and there was no time left for teams and individuals to work with coaches.

The second Institute was held at the Athens Public Library on April 20, 2011. In the previous institute an extended period of time was spent on each organization in attendance elaborating on what their mission was and what they needed following lunch, which did not allow for time for guided conversations between groups to occur. Based on this experience changes were installed in the schedule, so that following introductions of the project each individual in attendance at the Athens institute was asked to share what group they were representing along with a brief summary of their mission, then tell what their organization could offer in a potential collaboration and what their organizational needs were. This information was transcribed and posted along the wall so that other groups could brainstorm potential partnerships for the afternoon.

Eleven people participated in the Institute, representing nine organizations in the Athens area: one faith-based group, two university campus compact representatives and six nonprofits. All of the organizations are engaged in some capacity with youth initiatives in the county including after-school and food services for vulnerable youth, rehabilitation and art therapy services, and educational and tutoring services. Specific common needs expressed by participating organizations include professional volunteers to serve as mentors/tutors, funding for programmatic efforts and transportation, and marketing assistance with opportunities to network with more community organizations. Early into the institute it was apparent that there was an opportunity for university students at both Hocking College and Ohio University to serve as volunteers in community organizations serving youth in Athens County.

The use of posters detailing descriptions of each organization in attendance facilitated increased discussion during the lunch break and even before the afternoon sessions it was apparent that potential partnerships were beginning to form. Mary Woodward and Robin Stewart headed the panel discussion. During the panel discussion Mary Woodward offered advice on facilitating effective collaborations. She stated that the first step to effectively collaborate was to identify one common goal shared between the collaborators and make that goal the main focus of the collaboration. The development of this single focus allows for organizations participating in the partnership to overcome competing agendas and differing cultures. Also, once a common goal is identified the collaborators can identify the target population related to that goal, what their needs are, and what capacity is available from each of the partners, which can provide a foundation for planning action for the collaboration. Mary also advised the importance of having decision makers at the table at every step of the collaborative process. This eliminates bureaucracy because decisions can be made immediately instead of being relayed back to executive directors or leaders of organizations. Mary preached the importance of transparency with all actions related to the collaboration because openness builds trust between organizations and plays a role in developing a unified “team attitude.” Her final piece of advice was to allow for “emerging learnings” to occur throughout the collaborative process, which means that participating organizations should allow for group procedures to evolve and grow as the common goal is pursued. Too much rigidity in

structure and process prevents partnerships from being able to adapt to changes in the community landscape.

Robin advised the importance of establishing formal guiding principles for the partnership by drafting a Memorandum of Agreement that details a communication strategy, how decisions are made, core procedures and incorporates quantifiable ways to measure success. One concern addressed in the discussion was that there was conflict coordinating between planners and doers in partnerships, and that some organizations struggled moving from planning to action. Panelists advised that during the early planning phase of collaboration partners should identify immediate action that can be taken, but also to incorporate planning and evaluation into each phase of an initiative so that there is a continuing role for both types of people. After the panel discussion groups began to network with other groups and the shared focus of youth services facilitated meaningful discussion of potential partnerships. When participants reconvened several organizations stated an interest in following up with connections made at the Institute. Partnerships were specifically formed between small organizations needing volunteers and Campus Compact representatives who had access to pools of student volunteers. Other organizations expressed how they needed more practice connecting and were going to utilize the skills gained at the Institute to start developing a social map and identifying partners. The final discussion focused on how to end collaborations that either weren't working or had completed their objective. Panelists and participants agreed that how an organization transitions out of one partnership dictated how they entered the next partnership and therefore it was

important to utilize the transition as an opportunity for self-evaluation on the gains of the collaboration.

The final Institute took place in Ironton on April 26, 2010. Seven people attended the Institute representing four organizations: one faith-based organization and three non-profits. Unlike the first two Institutes, there was no universal focus between participants, and the missions of the organizations in attendance related to the *Call To Action* focus areas of food security, financial literacy and rehabilitation. The main needs expressed during introductions were volunteers, a means of communicating and connecting with other organizations and funding.

Rich Games and Bob Gordon headed the panel discussion and because of the low turn out for the Institute, they decided to utilize the afternoon as an opportunity to address specific issues groups were experiencing and hold an open conversation drawing knowledge from previous collaborations. One of the specific challenges relating to food security was that the territoriality of food pantries created an environment of distrust that undermined collaboration. Panelists suggested the use of neutral third party mediators to facilitate collaboration. The discussion also covered trends in volunteerism and community engagement, and participants shared best practices for recruiting volunteers.

The needs expressed by the organizations during the Institutes can be organized into three main categories: Funding and more specifically comprehensive fundraising strategy, volunteer recruitment and management strategy, and communication and marketing strategy. From initial discussions between

organizations it became clear that there was an organic collaborative opportunity between organizations that had a pool of volunteers interested in engaging in service and those needing volunteer support to build their capacity and deliver services to the community. Organizations with access to volunteers fell into three distinct categories: Churches who have organized groups of volunteers through previous charity events out of their congregation, University-affiliated organizations with access to student-service groups, and volunteer corps, such as the Retired Senior Volunteer Program (RSVP), whose sole purpose was to maintain volunteer pools and work collaboratively to connect those volunteers with organizations.

While the agenda for the morning stayed consistent across each of the Institutes, the agenda in the afternoon was adapted to meet the needs of the participating organizations at each location. At the Marietta Institute there was a sense that the participating organizations did not know who else was out there to collaborate with, so the afternoon served as an opportunity for organizations to become aware of other organizations in the county doing parallel or complementary work. This exposure to other organizations served as a foundation on which social maps can be constructed and future collaborations can be pursued. At the Athens Institute there was a pre-existing awareness of who the other organizations were and what their missions were, so the afternoon was utilized as an opportunity for “first dates” and the foundations of tangible collaborative partnerships. Finally, at the Ironton Institute organizations expressed challenges they faced with previous experiences, so facilitators of the Institute used the afternoon as an opportunity for an open-discussion

on strategies and ideas to address the critical issues facing organizations. Groups utilized shared experiences as an opportunity to brainstorm solutions to some of the barriers preventing collaboration, specifically troubles recruiting adult volunteers, overcoming turf sensitivity and navigating relationships between nonprofits and universities. This flexibility with the agenda proved to be one of the strengths of the Institutes.

After each Institute evaluations were given to participants. These evaluations specifically asked for feedback on what follow-up support would be most useful and organizations expressed an interest in contact information being shared between groups so that partnerships can continue to be pursued. Following the completion of the Institutes CEPG partners met to debrief the Institutes and brainstorm more ways to follow-up with groups. As mentioned earlier, technical assistance was offered to all participants at the conclusion of each Institute and so far two organizations have already requested assistance with developing partnerships. Members of the CEPG team also expressed an interest in performing an email follow-up with participants several weeks after the Institutes to identify what attempts at collaboration were made, what challenges have groups run into, and where successful collaborations were made. No timetable has been set up for this follow-up at this time. Partners also identified several specific instances where there was a clear opportunity to leverage individual efforts by developing county-wide networks, specifically dealing with food security in Washington County and youth services in Athens County. Finally, there was a discussion of using technical assistance funding to provide small-scale coaching

similar to what The Hub offers in West Virginia, but these next steps have yet to be pursued.

Application of Theories

Throughout the campaign the theories described in the theoretical framework manifested themselves in marketing materials, presentations, training tools and discussions. On the *Call to Action* general flyer (see Appendix D) the stated goal of the initiative is to “make an even greater positive impact in our local communities.” This begins framing partnership as a way of achieving community development specific to the action areas of *A Call To Action*. This framing of collaboration as a means for community development becomes a recurring theme in the letter sent to community and faith-based organizations (see Appendix E). The letter expressly states: “*A Call to Action* is an exciting new project designed to network resources, remove barriers and strengthen communities in Ohio.” The letter also frames partnerships formed through the campaign as an opportunity to build organizational capacity, stating: “*A Call to Action* seeks to expand the capacity of Faith-Based and Community Organizations in Ohio by serving as a catalyst for effective and sustainable partnerships between member-based organizations and programs that work.” These two roles of collaboration are driven home during Kent Spellman’s presentation when he emphasizes that effective collaboration opens doors to more funding opportunities, encourages organizations to efficiently use their resources, and allows for service organizations to reach more people in their community. Kent’s role

in the Partnership Development Institutes was to elaborate on the importance and benefits of pursuing collaborative partnerships.

The goal of the initial outreach strategy, which emphasized the development of sub-committees and local organizing teams, was to put in place a structure and channel that facilitated the diffusion of information about the campaign throughout communities in the region. Even after this strategy was abandoned, the Southeast Collaborative still relied on local MSOs and capacity-building organizations like United Way that had existing relationships with community groups to help advertise Institutes and encourage participation in *Together Ohio*. The hope was that through reaching out to these organizations, information about what services the Collaborative was providing and when training sessions were would be diffused across communities. Then during the Institutes, participants were given a copy of Kent's powerpoint presentation, a worksheet that helped them build social maps and articles on existing effective collaborations. Sources for more information on how to build partnerships were shared and organizations were encouraged to pass along tools they were given to other organizations they worked with. Finally, part of the afternoon session was dedicated to identifying potential partners and planning the next steps to pursuing collaboration. Armed with the best practices provided throughout the Institutes, the hope is that as these organizations follow-up on their plans to build partnerships they will employ and share the skills they gained with their future partner organizations, in turn starting the diffusion of innovation in that community.

The institutionalization of collaboration as an organizational priority was another dominant theme at the Institutes. Multiple presenters emphasized the importance of building MOAs that provide a formal structure for how an organization pursues partnerships. In addition, Kent specifically made a point of discussing how collaboration is not a one-time pursuit, but in order to be utilized effectively collaboration has to be practiced and pursued throughout the course of an organization's existence. Finally, during both Kent's presentation and panel discussions, there was significant emphasis placed on the idea that funders can tell when a partnership is insincere and that in order to reap the benefits of collaboration an organization had to show a dedication, both in terms of resources and time, to building partnerships. These interrelated themes built upon the idea that successful collaboration relies on organizations institutionalizing collaboration as a priority.

Finally, as discussed in the theoretical framework, the community development models of organizational development and planned change really only played a role at the conclusion on the campaign when organizations built off of the lessons learned at the Institutes and demonstrated an adoption of the desired behavior by building partnerships. That being said, the potential influence of partnerships formed between service organizations was alluded to several times throughout the Institutes. In discussing the benefits of collaboration, Kent mentioned that partnerships formed around a common mission can play a strong advocacy role in influencing policies related to the vulnerable groups they assist. Also, the recurring theme that collaboration allowed organizations to reach a wider audience lays the groundwork for

how the development of larger community-wide “organizations” have the ability to plan initiatives that influence a greater change in the well-being of poor people living in these communities.

Ultimately, the theories that made up the theoretical framework were pivotal in shaping the major themes of both the marketing campaign and the Institutes. At the completion of the campaign the hope is that through the utilization of these theories, the campaign served as a catalyst for community mobilization and development.

Chapter 9: Campaign Evaluation

The Southeast Collaborative faced a number of challenges simultaneously trying to meet both the needs of the organizations in the region and the goals set forth in the Together Ohio grant, none greater than the regime change in the Governor's office that led to speculation of the disbanding of the Governor's Office of Faith-Based and Community Initiatives and an end to the formal *Call to Action* recruitment process, signified by the inability to access the Sharepoint website used to enter pledge information. It was fortunate that funding was continued for the remainder of the project because, although the Collaborative was dedicated to providing collaboration-building support as promised in the Fall through whatever funding was available through the Regional Nonprofit Alliance, the Collaborative would not have been able to offer three comprehensive Institutes, especially two outside of Athens. Those Institutes served as a capstone to a year's worth of strategy-development and community engagement, and without them the Collaborative would not have met their mission of helping to build organizational capacity of nonprofits and faith-based groups in the region.

That being said, a change in philosophy away from the securing of pledges caused by the speculation of a cease in funding eliminated one of the tangible measures of behavior change, which was the number of groups that pledge to *A Call To Action*. While initial surveys following the Institute can provide insights on how groups plan on utilizing information provided during the campaign, these intentions may not necessarily translate into action, but being able to provide quantifiable

evidence that groups are making pledges to focus areas could have served as an indication of concrete action based on behavior change. Another shortfall of the Institutes was that they were designed so that the agenda could be adapted to address the specific needs of each community. While this allowed for the Institutes to be more dynamic in catering to different environments, the lack of consistency did not allow for the development of a pre- and post-test that would measure knowledge gained as a result of the Institute and not erroneously incorporate existing knowledge. Additionally, the test could have been designed so that questions asked reflect core messages the Southeast Collaborative wanted organizations to learn, so that the resonance of specific information in regards to collaboration could be measured.

Two tools were utilized to assess the changes across objectives following the conclusion of the Institutes. The first was a reflective assessment (see Appendix H) that asked organizations to identify what primary lessons they learned in terms of the value of partnering and collaboration and how to build and sustain these relationships. Participants were asked to rate how much they learned for each subject from “practically nothing about this topic” to “A great deal about this topic.” The assessment also asked participants to identify what next steps they would take following the Institutes. The second tool utilized to assess changes in regards to the campaign objectives was the satisfaction assessment (see Appendix I) issued at the end of the Institutes asking participants to rate the overall quality of the Institutes and again reflect on what was most valuable and how they plan to utilize lessons learned in the future. Complete results of the Satisfaction survey can be seen below. The

combination of these two evaluation tools, along with assessments from the CEPG team provides the foundation for the evaluation. This section will summarize the knowledge, belief and behavior change that occurred as a result of the campaign as well as lasting impressions of the relative success of the campaign.

Table 5: Satisfaction Assessment Results

Question	Average Score		
	Marietta (n=10)	Athens (n=8)	Ironton (n=6)
1. Please rate the workshop content; 1 = weak; 5 = strong	3.8	4.63	4.33
2. Please rate the workshop applicability to your needs; 1 = weak; 5 = strong	3.5	4.25	4.17
3. Please rate the workshop format or style; 1 = weak; 5 = strong	3.7	4	4.33
4. Please rate the technology used for this workshop; 1 = inappropriate and ineffective; 5 = appropriate and effective	4.2	4.43	4.33
5. Please rate the comfort of the room; 1 = uncomfortable; 5 = comfortable	4.22	4.63	3.67

Knowledge Change

Reflective assessments from each of the Institutes identified participants’ key takeaways from the Institutes. In addition, satisfaction assessments asked whether or not the content of the Institute was worthwhile and what information was most relevant to the organizations’ needs.

The key takeaways identified in the Marietta reflective assessment were: To let others what your needs are, that “connections flow to value,” that organizations should build collaborations that are long term and mutually beneficial, that

collaboration starts by asking more often for help, and that clear cut communication is key. Comments in the satisfaction assessment were generally positive about the content of the workshop in Marietta. Several respondents stated that they left the institute better prepared to determine how and when to make partnerships. Participants also commented that the content was pertinent to what they were doing in their organizations. While almost all comments were positive, a couple respondents left the workshop wishing for more information on how to form partnerships and strategizing. Generally, the content presented worthwhile ideas that will assist organizations in forming partnerships in the future.

The key takeaways in Athens were: You can get things done that you otherwise would not be able to do through collaboration, the key to collaboration was getting the right people on the bus and the wrong people off the bus, and that it was important to focus on one goal and have decision-makers at the table. Comments reflected in the satisfaction assessment were generally positive concerning the content of the partnership development institute. Participants believed that the institute was helpful, providing “evidence based, cutting-edge, and time proven information on the simple act of partnering.” Respondents also believed that the institute provided guidelines about how to develop partnerships. While comments were positive, one participant felt that more partnerships could have been developed if more organizations were in attendance.

The key takeaways in Ironton were: Collaboration must be intentional, building a relationship starts with communication to build trust, and credit should be

given away. Participants' comments in Ironton were also generally positive concerning the value of the content presented at the workshop. One participant stated "Yes, lots of good information about how to reach out to other agencies in the community." Individuals felt that a lot of good information was presented that would assist in creating collaborative or partnerships in their organizations.

Belief Change

The measure of belief change reflected from the Reflection Assessment was assessed through the question asking participants to describe how much they learned about the value and benefits of collaboration. Since the belief objective was to create the belief that there is value in collaboration, identifying whether participants placed value on lessons related to the value of collaboration, and what specific values resonated with organizations, gives some insight on belief change.

In Marietta four groups indicated on the reflective assessment that they learned *A great deal about this topic* and six participants indicated that they learned *Some things about this topic*, referring to the *value and benefits of partnering and collaboration*. No one answered that they learned either *Very few things about the topic* or *Practically nothing about this topic*. Messages that resonated with participants in Marietta were: Partnerships will never be obtained if you do not ask, collaboration with others is effective for achieving goals, sharing expenses, and recruiting volunteers, and communication is vital to achieve organizational goals.

In Athens five participants indicated that they learned *A great deal about this topic* and two participants indicated that they learned *Some things about this topic*,

referring to the *value and benefits of partnering and collaboration*. No one answered that they learned either *Very few things about the topic* or *Practically nothing about this topic*. Beliefs that were well-received with participants in Athens were: You can do more with help from others, there is no such thing as too much collaboration, and that “giving away” the credit is key to successful collaboration.

Finally, in Ironton three participants indicated that they learned *A great deal about this topic* and three participants indicated that they learned *Some things about this topic*, referring to the *value and benefits of partnering and collaboration*. No one answered that they learned either *Very few things about the topic* or *Practically nothing about this topic*. Beliefs that were well-received with participants in Ironton were: To not be afraid to reach out and talk to other organizations, that collaboration must be intentional, and that there were resources in the community to recruit volunteers, including Campus Compact, Campus Community Link, etc.

Behavior Change

The primary measure of behavior change is the initial response of participating organizations on how they intend to utilize the skills learned following the Institutes. Both the Reflective Assessments and the Satisfaction Assessments contained questions asking about how groups intend to utilize the skills gained from the Institutes.

In the satisfaction assessment from the Marietta Institute Participants stated that they plan to implement the training content in a variety of different ways. Many of the respondents indicated that they plan to find an organization or agency to collaborate with, so that the partnership is mutually beneficial. Similarly, others

responded that they were planning to use the information to increase volunteering, communication skills, and social networking in order to promote their organization's goals more effectively. These assertions were echoed in the reflective assessment, where organizations said that they would review existing methods of forming partnerships, write down their "social map" and develop a to-do list, re-connect with partners they have worked with in the past, share volunteer recruitment and funding challenges, initiate the use of social media tools, and look for agencies to collaborate with.

Similarly, respondents to the satisfaction assessment in Athens were generally positive about their organization's willingness to implement what they learned at the institute. Participants stated that they plan to form partnerships with other organizations in their communities in order to fulfill their mission. One participant stated that they "made a great connection and are planning to meet in the future with serious intentions of collaborating." Overall, participants plan to seek out potential partners and form collaborative efforts in the future as a result of the training. In the reflective assessment organizations stated that they would establish MOA's with collaborating agencies, connect and share resources with a few organizations in Athens, look more broadly for possible partners, and map existing contacts so that they can connect with other organizations.

Finally, improving communication and developing partnerships were the main focus of respondents in Ironton. Respondents generally maintained that they would improve communication between their agency and other agencies in the community to

form collaborative partnerships. In the reflective assessment groups expressed a desire to do more to build relationships with other organizations with similar interests, open lines of communication, reevaluate PR and volunteer recruitment initiatives, work more with state literacy organizations, and nurture partnerships.

In addition to the behavior changes identified in the post-Institute evaluations, members of the Southeast Collaborative convened after the Institutes to discuss general impressions about the Institutes. There was an overwhelming consensus between partners that Institutes were most successful when organizations with similar missions were brought together. The site that demonstrated the most readiness to pursue collaboration was Marietta because organizations were united by the issue of food security and simply needed help identifying other organizations doing parallel work in the community. Mobilization around the issue of food security could occur relatively quickly because initiatives related to food security tend to be smaller, one-time events and food security is such a pervasive public issue that it serves as a catalyst for action. Partners also speculated that there was an opportunity in Athens to build a youth development network at the county level to help connect organizations engaged in this type of work, but unlike in Marietta, forming partnerships around youth development will take a longer time to facilitate. Partners conceded that Ironton presented the greatest challenge because the working culture in the community and the lack of existing structures of support for community organizations created insurmountable barriers to collaboration. Additionally, an atmosphere of distrust created from the perception of a “top-down” service prevented faith-based

participation in the Institute. Failure in defining who the Southeast Collaborative was resulted in the group being branded an “outsider” in Ironton. Overall, the lasting benefits of the Institutes as perceived by the CEPG team were that community organizations were given access to resources and information they didn’t have prior to the Institutes, that, while the campaign did not engage larger non-profits in the region, the campaign did reach new smaller organizations that were exposed to the services and help offered at the Regional Nonprofit Alliance, and most importantly that the Institutes provided a point of access for organizations to gain technical assistance free of charge, a distinctly unique opportunity in Appalachian Ohio.

Reflecting on the two tools in place, the greatest failure from an evaluation standpoint is that not enough emphasis was placed on completing the two evaluation forms, leading to a low participation rate relative to the number of people that attended the Institutes. While the responses provide some insight on what was gained through the Institutes, low response rates limits the ability to draw bigger conclusions on the relative success of the campaign. Also, the lack of a long-term follow-up plan at the onset of the campaign limits the current understanding of behavior change to the intentions of participating groups, as opposed to actions pursued by organizations following the campaign. This short-sightedness prevents a full realization of the impact of the campaign until a more comprehensive follow-up is implemented.

Chapter 10: Lessons Learned and Summary

One of the resounding messages that came out of Kent Spellman's presentation on collaboration was that not all collaborations are meant to succeed and that the pursuit of collaborative relationships is still very much a process of trial and error. There is very sparse research on the holistic impact of collaboration and the literature that does exist on collaboration is primarily case studies of successful partnership efforts. While this provides a foundation for the development of best practices, it only tells half the story of how to navigate through these collaborations, and until more research is developed that focuses on failed efforts, there won't be a complete understanding of the collaborative process.

From an internal perspective, while a social marketing framework was applied to the campaign, not enough time and effort went into developing a detailed marketing strategy for the *Together Ohio* campaign, especially in terms of putting quantitative measures in place to allow for a more thorough evaluation of behavior change. For future campaigns it will be beneficial to develop consistent survey questions prior to and after the campaign, and surveying the same pool of people so that changes in knowledge, beliefs and behavior can be quantified. Also, in future efforts it would be valuable to determine a follow-up strategy prior to the implementation of the campaign and communicate what is expected from individuals and organizations prior to their participation in campaign events so that they are aware of what to expect and are more likely to provide feedback.

Despite a coordinated effort to target faith-based groups, the campaign ultimately failed to really engage the faith-based community. In part this is because the faith-based community in rural Ohio is, on the whole, an insulated and isolated community that is satisfied with coordinating their own outreach initiatives and aren't looking to be engaged. Additionally, the "outsider" stigma attached to the Southeast Collaborative, especially in Southern regions of the campaign area, influenced the lack of participation from the faith-based community. Overcoming this barrier involves gaining a deeper understanding of the values of the faith-based community. In his 1968 book "Social Theory and Social Structure" sociologist Robert. Merton theorizes that the formation of in-groups is a result of conformity around a set of values and norms, and that non-conformity to these norms leads to the creation of a perceived out-group (Merton, 1968). Within the context of this socialization model individuals can become part of the in-group only after adopting the set of values that group. Therefore, more research on the values and motivations of the faith-based community is required for future attempts to engage these types of groups.

The resounding exception to the "outsider" mentality during campaign initiatives was with organizations dedicated to food security. During collaborative efforts with these organizations groups were able to overcome their cultural and ideological differences and have meaningful discussions because they were motivated by the greater good of feeding people. As mentioned in the previous section, food insecurity is such a prevalent and public issue in the region that it creates a catalyzing environment that mobilizes organizations to form partnerships. Mary Woodward,

President of VOAD, has had similar success recruiting organizations around the issue of disaster relief because it too is a very prevalent societal problem that garners significant support without much recruiting. In Athens alone, the Athens Foundation was able to raise over \$30,000 from citizens for the reconstruction of Athens High School stadium after storms destroyed the stadium in the fall. The inability to garner interest in the other focus areas of the *Call To Action* is in part because those focus areas address hidden needs in the community and the same catalyzing environment that exists with food security and disaster relief initiatives is absent for initiatives related to youth development, financial literacy, prisoner re-entry and adoption. This suggests that during the campaign the concept of collaboration was perhaps incorrectly framed. Emphasis was placed on individual benefits of collaboration for service organizations because it was assumed that self-survival in an environment characterized by financial cuts was enough of a motivating factor to garner interest in the campaign. The role of collaboration in community development was a secondary frame applied to the concept. What might have been more effective is to frame collaboration as a means of addressing the specific focus areas in the campaign. Under this framework the first step of the campaign would be to educate organizations and individuals about the severity of the situation for those hidden issues in order to create a catalyzing environment, then rally around organizations already engaged in those focus areas and brainstorm initiatives that get more organizations involved.

In general, the question of how to frame campaigns focused on volunteerism and poverty alleviation lingers, but there are two general guidelines gleaned from this

specific campaign. The first guideline is that when dealing with these focus areas it is important to recognize that there is an emotional aspect to this type of work and using an overly pragmatic tone in a campaign hinders its resonance with an audience passionate about their work. The second guideline is that even if a campaign has a specific target audience (in this instance faith-based groups and nonprofits), it is still important to design messages that resonate with the general public so that the potential appeal of the campaign is not limited.

Ultimately, the impact of the Partnership Development Institutes hasn't yet come to realization and therefore any evaluation of the campaign's success is still incomplete. The institutes served as a foundation to foster partnerships within the communities reached, but at the conclusion of the institutes the onus of responsibility to apply lessons learned falls on the participating organizations. In order to track application it's paramount for the CEPG partners to conduct a follow-up with participating organizations after a few weeks to gain insight on whether they did pursue partnerships and what sort of problems they faced. There is also a potential role for the Regional Nonprofit Alliance to continue to foster collaborations identified through the institutes by facilitating the creation of formal networks and by continuing to provide technical assistance in the form of coaching organizations through the collaborative process. The extent to which these efforts will be pursued depends on the availability of future funding and the capacity of the Regional Nonprofit Alliance.

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Appendix A: Together Ohio Needs Assessment Survey

Together Ohio: Southeast Regional Collaborative

Please take a moment to help groups and organizations in your community by completing the brief survey. Responses will remain confidential unless you indicate otherwise. Only one survey should be completed for the organization or group you represent. Responses should reflect the needs of the entire organization or group rather than individual needs.

1. Please choose one description that you believe most fits your organization or group. I am completing this form as the representative from my:

- Church
- Faith-Based Organization
- Membership Organization/Group (e.g., Rotary, Kiwanis, VFW, fraternity, etc.)
- Community-based group or non-profit organization (e.g., Big Brothers Big Sisters, United Way, etc.)

2. Does your organization or group have non-profit status? Yes No

3. Which counties does your organization or group represent? (Please mark all that apply.)

- Athens Hocking Meigs Noble Scioto
- Belmont Jackson Monroe Pike Vinton
- Gallia Lawrence Morgan Ross Washington
- Other (Please specify.) _____

4. On an annual basis, about how many people does your organization or group serve through outreach programs or services to individuals, families, or communities? (Note to Churches: Please do not include the members of your congregation in this count.)

- Less than 50 people 101 to 200 people
- 51 to 100 people More than 200 people
- My group or organization does not currently provide direct services to individuals or families.

5. About how many people work for your organization or group? Please provide an estimated number for each category. If your organization or group does not have any personnel in one or more of the following categories, please enter "0" (zero).

Full-time: _____ Part-time: _____ Volunteers: _____

6. About how many years has your organization or group been in operation?

- Less than 1 year 1 to 5 years 6 to 10 years More than 10 years

Call to Action Initiatives:

7. Is your organization or group familiar with the Governor's Office of Faith-Based and Community Initiatives' Call to Action? Yes No (If no, please skip to question 9.)

8. If yes, what is the current status of your organization or group in regards to the Call to Action? (Please mark only one.)

- My organization or group has trained or hosted a group implementing a Call to Action.
- My organization or group is aware of the Call to Action, but we have not pledged a program.
- My organization or group has pledged and is currently implementing a Call to Action program.
- My organization or group has pledged and successfully implemented a Call to Action program.
- I don't know the status of my organization or group.

9. A Call to Action aims to recruit faith-based and community groups to initiate or expand "good works" programs in their communities by teaming them up with partner agencies that provide the services listed below. Would your organization or group be interested in becoming involved or more involved with a Call to Action? Yes No (If no, please continue on the next page.)

10. My organization or group is interested in training or hosting a faith-based or community group for a Call to Action. Please send more information. Yes No

11. My organization or group is interested in pledging to volunteer for a Call to Action. Please send more information. Yes No

12. In which of the following areas would your organization or group be interested in becoming involved or more involved? (Please mark all that apply.)

- Recruiting mentors for young people
- Supporting a local food pantry
- Becoming an Ohio Benefit Bank site
- Recruiting adoptive and foster care families
- Establishing a financial education program
- Becoming a summer food and learning site
- Recruiting volunteers to work with adult and youth re-entry programs
- Establishing a consumer protection program
- Educating your community on disaster preparedness

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The following table provides a list of activities that organizations or groups typically have to develop or manage to fulfill their missions. Please read carefully through these activities, and identify which areas your organization or group could use more help. Remember, the identification of organizational needs and areas of interest will help the *Together Ohio: Southeast Regional Collaborative* determine needs across the region and will direct the content of free trainings and personalized help.

Operations, Planning and Board Development	Not helpful	Somewhat helpful	Very helpful	N/A
Obtaining non-profit status	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Undertaking strategic planning	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Planning for organizational change	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Managing staff and organizational issues (e.g., teamwork, conflict resolution, etc.)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Board training and/or development	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Improving management skills	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Recruiting and managing volunteers	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Maintaining human resource records and managing human resources departments	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Establishing or updating your mission and vision	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Assessing community needs	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Designing new programs	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Adjusting programs/services to meet changing needs of clients	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Evaluating program outcomes or impact	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Fundraising and Fiscal Management	Not helpful	Somewhat helpful	Very helpful	N/A
Managing finances or financial accounting	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Understanding tax laws and auditing requirements	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Learning about and establishing a social enterprise (a for-profit business to generate money to support mission-related activities; social entrepreneurship)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Writing grant proposals	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Developing and implementing a fundraising strategy (e.g., developing a capital campaign, special events, etc.)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Networking, Collaboration and Advocacy	Not helpful	Somewhat helpful	Very helpful	N/A
Effective collaboration with other organizations	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Networking with key and potential stakeholders	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Strengthening relationships with key policy makers	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Communication and Information Technology	Not helpful	Somewhat helpful	Very helpful	N/A
Developing a marketing plan	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Utilizing electronic media for effective communication (e.g., email, websites, social networking sites)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Applying innovative uses of technology to achieve your mission or goals	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Training staff and/or volunteers to use technology effectively	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Creating, updating, and effectively using databases	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Please specify any other activities that would be helpful: _____

Please think about the activities you indicated in your responses above. The following table is a list of types of assistance that may be available to your organization related to the activities you are most interested in. How helpful would each of these types of assistance be for your organization as it tries to meet those challenges? (Please select the best response for each type of assistance.)

Types of Assistance	Not helpful	Somewhat helpful	Very helpful	N/A
One-on-one help from an expert via in-person meetings	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
One-on-one help from an expert via telephone	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
One-on-one help from an expert via video conference	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Trainings and workshops	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Opportunities to interact with and learn from peers	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

If you would like to receive more information on the *Call to Action* initiative or the training and hands-on help opportunities provided by the *Together Ohio: Southeast Regional Collaborative*, please provide contact information below (optional):

Name: _____ E-mail: _____

Organization/Group: _____

Address: _____

City: _____ State: _____ Zip: _____ Phone: (____) _____-____

The *Together Ohio: Southeast Regional Collaborative* partners and the *Regional Nonprofit Alliance* thank you for your time and participation in this survey. Please return the survey in the enclosed postage paid envelope.

Appendix B: Comprehensive Survey Results

Please choose one description that you believe most fits your organization or group:		
	N	Percent
Church	18	14.0%
Faith-Based	30	23.3%
Membership	13	10.1%
Community-Based	68	52.7%
Total	129	100.0%

Does your organization or group have non-profit status?:		
	N	Percent
Yes	115	90.6%
No	12	9.4%
Total	127	100.0%

Which counties does your organization or group represent?:*		
	N	Percent
Athens	39	30.2%
Belmont	9	7.0%
Gallia	18	14.0%
Hocking	23	17.8%
Jackson	18	14.0%
Lawrence	16	12.4%
Meigs	31	24.0%
Monroe	7	5.4%
Morgan	17	13.2%
Noble	8	6.2%
Pike	21	16.3%
Ross	21	16.3%
Scioto	22	17.1%
Vinton	23	17.8%
Washington	26	20.2%
Other*	28	21.7%
Total	129	100.0%

*Allows for multiple responses

On an annual basis, about how many people does your organization or group serve through outreach programs or services to individuals, families, or communities?:		
	N	Percent
Less Than 50	12	9.5%
50 To 100	11	8.7%
101 To 200	17	13.5%
More Than 200	78	61.9%
No Current Services	8	6.3%
Total	126	100.0%

About how many people work for your organization or group?						
	Staff Designation					
	Full-Time		Part-Time		Volunteers	
Employees	N	Percent	N	Percent	N	Percent
Zero	29	29.0%	23	23.5%	2	1.9%
1 To 5	45	45.0%	52	53.1%	18	17.0%
6 To 10	4	4.0%	12	12.2%	17	16.0%
11 To 20	5	5.0%	3	3.1%	21	19.8%
21 To 50	4	4.0%	5	5.1%	26	24.5%
More than 50	13	13.0%	3	3.1%	22	20.8%
Total	100	100.0%	98	100.0%	106	100.0%

About how many years has your organization or group been in operation?:		
	N	Percent
Less That 1 Year	6	4.8%
1 To 5 Years	14	11.2%
6 To 10 Years	21	16.8%
More than 10 Years	84	67.2%
Total	125	100.0%

Is your organization or group familiar with the Governor's Office of Faith-Based and Community Initiative's <i>Call to</i>		
	N	Percent
Yes	59	47.6%
No	65	50.8%
Total	124	100.0%

What is the current status of your organization or group in regards to the <i>Call to Action</i> ?:		
	N	Percent
Trained Or Hosted A Group Implementing A Call To Action	3	5.0%
Not Yet Pledged A Call To Action	21	35.0%
Currently Implementing A Call To Action	2	3.3%
Pledged And Successfully Implemented A Call To Action	5	8.3%
Call To Action Status Unknown	25	48.3%
Total	60	1

Would your organization or group be interested in becoming involved or more involved with a <i>Call to Action</i> ?:		
	N	Percent
Yes	80	70.2%
No	34	29.8%
Total	114	100.0%

My organization or group is interested in training or hosting a faith-based or community group for a <i>Call to Action</i> .		
	N	Percent
Yes	47	63.5%
No	27	36.5%
Total	74	100.0%

In which of the following areas would your organization or group be interested in becoming involved or more involved?*		
	N	Percent
Recruiting Youth Mentors	26	20.2%
Supporting A Local Food Pantry	32	24.8%
Becoming an Ohio Benefit Bank Site	22	17.1%
Recruiting Adoptive/Foster Families	7	5.4%
Establishing A Financial Education Program	26	20.2%
Becoming A Summer Food And Learning Site	19	14.7%
Recruiting Adult/Youth Re-Entry Program Volunteers	21	16.3%
Establishing A Consumer Protection Program	12	9.3%
Educating On Disaster Preparedness	22	17.1%
Total	129	100.0%

*Allows for multiple responses

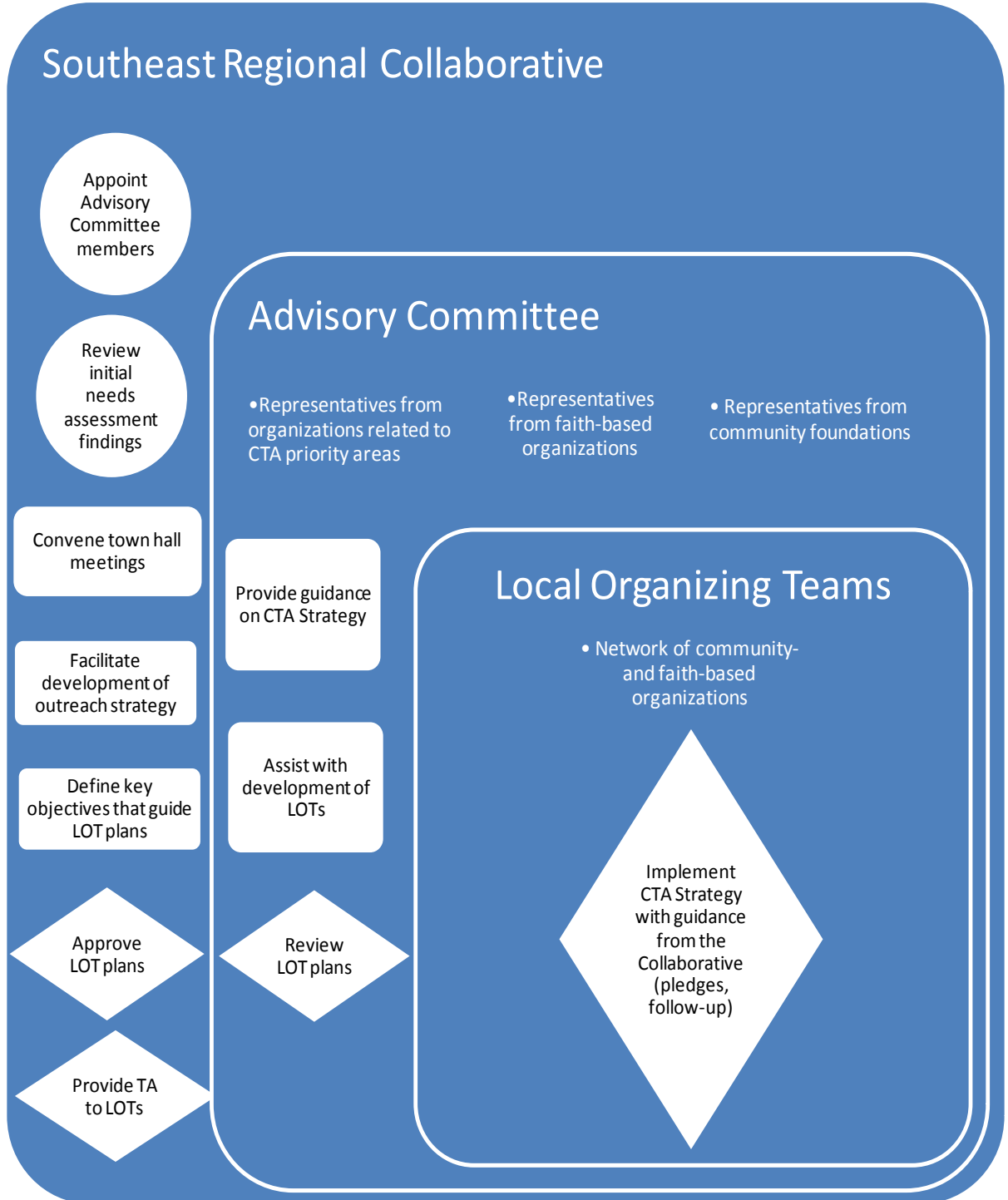
Please read carefully though these activities, and identify which areas your organization or group could use more help:




Areas For Assistance	Ratings									
	Not Helpful		Somewhat Helpfu		Very Helpful		Not Applicable		Total	
	N	Percent	N	Percent	N	Percent	N	Percent	N	Percent
Obtaining Non-Profit Status	18	19.8%	9	9.9%	12	13.2%	52	57.1%	91	100.0%
Undertaking Strategic Planning	13	14.1%	19	20.7%	45	48.9%	15	16.3%	92	100.0%
Planning For Organizational Change	14	15.2%	27	29.3%	33	35.9%	18	19.6%	92	100.0%
Managing Staff And Organizational Issues	21	22.8%	24	26.1%	33	35.9%	14	15.2%	92	100.0%
Board Training And/Or Development	18	19.1%	19	20.2%	40	42.6%	17	18.1%	94	100.0%
Improving Management Skills	11	12.0%	28	30.4%	39	42.4%	14	15.2%	92	100.0%
Recruiting And Managing Volunteers	8	8.6%	27	29.0%	52	55.9%	6	6.5%	93	100.0%
Maintaining Human Resource Records And Managing Human Resource Departments	25	26.9%	20	21.5%	23	24.7%	25	26.9%	93	100.0%
Establishing Or Updating Your Mission And Vision	24	26.4%	24	26.4%	27	29.7%	16	17.6%	91	100.0%
Assessing Community Needs	11	11.7%	26	27.7%	48	51.1%	9	9.6%	94	100.0%
Designing New Programs	18	19.6%	25	27.2%	41	44.6%	8	8.7%	92	100.0%
Adjusting Programs/Services To Meet Changing Needs Of Clients	16	17.2%	30	32.3%	34	36.6%	13	14.0%	93	100.0%
Evaluating Program Outcomes Or Impact	13	13.8%	26	27.7%	46	48.9%	9	9.6%	94	100.0%
Managing Finances Or Financial Accounting	24	25.8%	18	19.4%	35	37.6%	16	17.2%	93	100.0%
Understanding Tax Laws And Auditing Requirements	22	23.7%	26	28.0%	30	32.3%	15	16.1%	93	100.0%
Learning About And Establishing A Social Enterprise	25	27.5%	13	14.3%	27	29.7%	26	28.6%	91	100.0%
Writing Grant Proposals	11	12.1%	24	26.4%	48	52.7%	8	8.8%	91	100.0%
Developing And Implementing A Fundraising Strategy	8	8.5%	26	27.7%	53	56.4%	7	7.4%	94	100.0%
Effective Collaboration With Other Organizations	9	9.8%	25	27.2%	50	54.3%	8	8.7%	92	100.0%
Networking With Key And Potential Stakeholders	9	9.7%	27	29.0%	48	51.6%	9	9.7%	93	100.0%
Strengthening Relationships With Key Policy Makers	13	14.0%	29	31.2%	40	43.0%	11	11.8%	93	100.0%
Developing A Marketing Plan	15	16.0%	27	28.7%	35	37.2%	17	18.1%	94	100.0%
Utilizing Electronic Media For Effective Communication	13	13.7%	26	27.4%	48	50.5%	8	8.4%	95	100.0%
Applying Innovative Uses Of Technology To Achieve Your Mission Or Goals	14	14.4%	22	22.7%	50	51.5%	11	11.3%	97	100.0%
Training Staff And/Or Volunteers To Use Technology Effectively	19	20.0%	18	18.9%	47	49.5%	11	11.6%	95	100.0%
Creating, Updating, And Effectively Using Databases	19	20.2%	13	13.8%	50	53.2%	12	12.8%	94	100.0%

How helpful would each of these types of assistance be for your organization as it tries to meet those challenges?										
Assistance Delivery Methods	Ratings									
	Not Helpful		Somewhat Helpfu		Very Helpful		Not Applicable		Total	
	N	Percent	N	Percent	N	Percent	N	Percent	N	Percent
Trainings And Workshops	6	6.5%	23	25.0%	60	65.2%	3	3.3%	92	100.0%
Expert One-On-One Help Via In-Person Meetings	9	10.0%	21	23.3%	52	57.8%	8	8.9%	90	100.0%
Interact/Learn From Peers	10	11.0%	28	30.8%	46	50.5%	7	7.7%	91	100.0%
Expert One-On-One Help Via Video Conference	22	25.9%	28	32.9%	23	27.1%	12	14.1%	85	100.0%
Expert One-On-One Help Via Telephone	20	23.0%	35	40.2%	21	24.1%	11	12.6%	87	100.0%

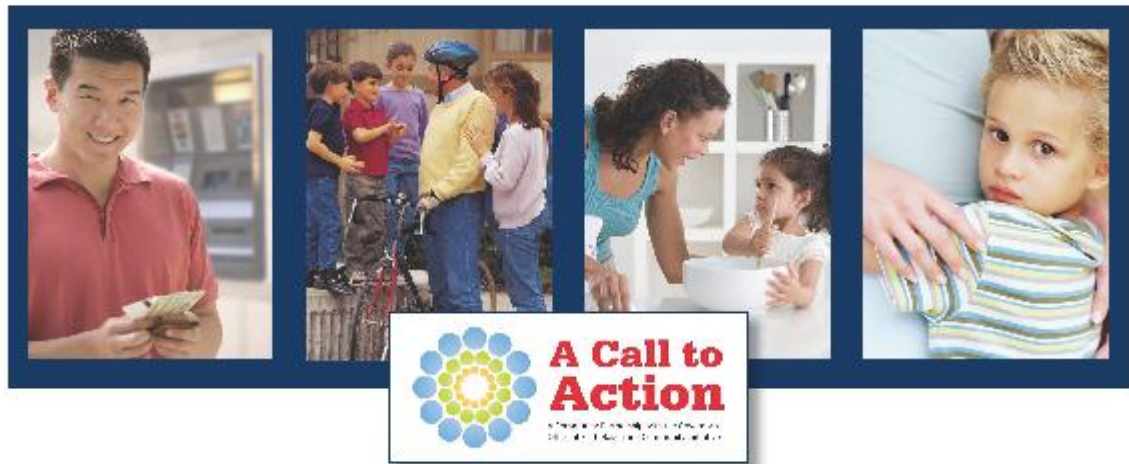
Appendix C: Together Ohio Outreach Strategy

Together Ohio Call to Action Strategy



-  Phase I: Initial Planning - completed April 30, 2010
-  Phase II: Development of Outreach Strategy Using Social Marketing Framework - completed July 30, 2010
-  Phase III: Community Organizing and Strategy Implementation - full implementation by December 31, 2010

Appendix D: A Call to Action Flyer



ORGANIZATIONS

Your organization is an asset to your community.

Become involved in a *Call to Action* and accomplish more with access to additional resources. Choose a *Call to Action* program area that complements your organizational mission and let us assist you with recruiting volunteer and service groups to help expand your services in the chosen area.

VOLUNTEERS

Service groups with a shared interest in “good works” unite.

Become involved in a *Call to Action* and be introduced to a range of volunteer opportunities. Choose a *Call to Action* program area that complements your group’s area of interest and let us connect you with an organization working toward the same goal.

A CALL TO ACTION

Promotes and assists a regional network of nonprofit, faith and community-based groups, working as partners, to make an even greater positive impact in our local communities.

Become involved in A Call to Action by calling the Regional Nonprofit Alliance at 740-597-1686 or emailing RNA@ohio.edu

Together Ohio: Southeast Regional Collaborative

The Stevens
Literacy Center
at Ohio University

College of Osteopathic
Medicine
at Ohio University

The Regional
Nonprofit Alliance
at Ohio University’s
Voinovich School

COAD
Corporation for Ohio
Appalachian Development

Sojourners Care
Network

Appendix E: Community Letter for Listening Sessions



Together Ohio: Southeast Regional Collaborative



Greater Lawrence County Area Chamber of Commerce
Bill Dingus, Executive Director
216 Collins Ave
South Point, OH 45680

October 15, 2010

Dear Community Partner,

Do you need more volunteer power to help carry out your mission?

We would like to hear your thoughts and experiences and discuss how we can create effective and long-lasting partnerships to better serve our communities. We would like to share information about a new statewide initiative that promotes volunteerism and strengthens community-based partnerships. As part of the Governor's Office of Faith-Based and Community Initiatives, *A Call to Action* seeks to expand the capacity of Faith-Based and Community Organizations in Ohio by serving as a catalyst for effective and sustainable partnerships between member-based organizations and programs that work.

The project aims to recruit faith and community-based groups to start or expand services provided by existing organizations in the following "good works" priority areas: mentoring, food pantries, the Ohio Benefit Bank, adoptive and foster care, financial education, summer food service programs, adult and youth re-entry, consumer protection, and disaster preparedness. *Please join us to learn more about A Call to Action and how you can take part to further improve upon the great work your organization is already carrying out in your community!* **Five one-hour sessions are listed below so that you may select the date and location that best accommodates your schedule; food and refreshments will be provided.**

- *November 2, 2010 at 12:00 p.m. Marietta Library 615 5th Street Marietta, OH*
- *November 4, 2010 at 9:30 a.m. COAD 1 Pinchot Lane Athens, OH*
- *November 8, 2010 at 8:00 a.m. Ross County ODJFS 475 Western Avenue Chillicothe, OH*
- *November 9, 2010 at 12:00 p.m. St. Clairsville Public Library 108 W. Main Street St. Clairsville, OH*

- *November 15, 2010 at 12:00 p.m. Briggs Lawrence County Public Library 321 S. 4th St. Ironton, OH*

A Call to Action is an exciting new project designed to network resources, remove barriers and strengthen communities in Ohio. I hope your organization will join us and share your valuable input in one of our listening sessions. **Please RSVP to the Regional Nonprofit Alliance: RNA@ohio.edu or call 740-597-1686 if you have questions.**

Sincerely,



Judith Millesen
Director, Regional Nonprofit Alliance

The Regional Nonprofit Alliance · Suite 210, Bldg. 20, The Ridges · Athens, OH 45701

Appendix F: Partnership Development Institute Agenda

**The Together Ohio Community Engagement Partnership Grant
(CEPG)**

Partnership Development Institute hosted by:

United Way of the River Cities

April 26, 2011 – 10:00am – 2:00pm

Agenda

- **Arrival and Welcome:** Rich Games of Sojourners and member of the CEPG Team
- **Introductions**
- **Presentation on Collaboration:** Kent Spellman, Executive Director of the West Virginia Community Development Hub
- **Lunch and Networking**
- **Panel Discussion**
- **Action Planning and Fine Tuning Exercise**
- **Evaluations and Conclusion**

Appendix G: Social Map Worksheet

My organization's need:

Who are Potential Partners?

Partners	<ul style="list-style-type: none">• How do I think they might be able to help?• What can my organization contribute?

What are my next steps?

1. _____

2. _____

Appendix H: Partnership Development Institute Reflection



Together Ohio: Southeast Regional Collaborative



Partnership Development Institute: Post Content Reflective Assessment

Thank you for participating in this Partnership Development Institute. We want to capture what you learn by having you fill out this brief assessment at the end of the workshop. We will not use personal identity with any data that we collect from today's workshop. Please take a few minutes to **briefly respond** to each section of the assessment and also check the box to the left of the statement that best describes how much you learned about each topic.

1. *The Value and Benefits of Partnering and Collaboration*

- The key takeaway for me regarding this topic is:

- What are one or two things you will do as a result of this?

Overall, I learned (Check one):

A great deal about this topic.	Some things about this topic.	Very few things about this topic.	Practically nothing about this topic.
--------------------------------	-------------------------------	-----------------------------------	---------------------------------------

2. *How to Build and Sustain Effective Collaborations*

- The key takeaway for me regarding this topic is:

- What are one or two things you will do as a result of this?

Overall, I learned (Check one):

A great deal about this topic.	Some things about this topic.	Very few things about this topic.	Practically nothing about this topic.
--------------------------------	-------------------------------	-----------------------------------	---------------------------------------

Appendix I: Partnership Development Institute Satisfaction Survey


Together Ohio: Southeast Regional Collaborative


Partnership Development Institute Satisfaction Assessment

Site Attended: _____

Date: _____

Please indicate if your organization seeks to meet any of the following TANF goals (check all that apply):

- _____ Assisting TANF families so children can be cared for in their own homes
- _____ Promoting job preparation, work and/or marriage
- _____ Preventing out-of-wedlock pregnancies
- _____ Encouraging the formation and maintenance of two-parent families

Please rate the workshop content; 1 = weak; 5 = strong (circle one)	1	2	3	4	5
1. Was the content of this workshop worthwhile? Why or why not?					
Please rate the workshop applicability to your needs; 1 = weak; 5 = strong (circle one)	1	2	3	4	5
2. What do you plan to implement as a result of this workshop?					
Please rate the workshop format or style; 1 = weak; 5 = strong (circle one)	1	2	3	4	5
3. Was the format (style) of the workshop suitable to you learning the content? Why or why not?					
Please rate the technology used for this workshop; 1 = inappropriate and ineffective; 5 = appropriate and effective (circle one)	1	2	3	4	5

4. Did the technology used to deliver the workshop content work well or did it get in the way of your learning?									
Please rate the comfort of the room; 1 = uncomfortable; 5 = very comfortable (circle one)					1	2	3	4	5
5. Do you have any suggestions for making the environment more conducive to learning?									
6. What other topics or information would be useful to the current/future needs of your organization?									

Thank you for taking the time to fill out this questionnaire

Acknowledgements

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