

Added Value

Timely Info from Karen Eber Davis Consulting

Fall 2003

Anatomy of a New Program: The Nonprofit Forum

In January 2002, event-rich Southwest Florida was introduced to a new must-do activity. "Participants really got a lot out of it," said Ansley Mora, the first coordinator of the Nonprofit Forum. With plans underway for the third forum, this issue explores the strategic thinking that helps to make the forums and other activities compelling. You can use this information as you plan your next new program, not only ones that educate large groups, but also those where you wish to add value to your organization and the community.

Forum Overview

The nonprofit forums offer about 200 participants, from a variety of organizations, an inexpensive educational networking opportunity. Sponsored by the Nonprofit Resource Center and local foundations, the first forum offered two round table learning opportunities. After introductions, the forum leaders invited participants to select topics of interest at about 20 tables. For example, in 2003, choices included Nurturing Volunteers, Creating Effective Newsletters and Program Evaluation. Sessions lasted 45 minutes and meals allowed attendees to network. Each table's expert facilitator helped participants learn from each other as well as the materials they

presented. The sponsors expanded the second year's forum to include three-round table sessions, a boxed lunch (replacing the initial year's continental breakfast) and a keynote speaker.

The University of South Florida donated the Harry Sudakoff Conference Center to host the first two forums. This facility's location near the borders of Sarasota and Manatee County provides access to I-75. Invitees included nonprofit staff, volunteers and board members from those two counties, plus DeSoto and Charlotte Counties. Initially free, leaders set the second year's price at \$15 to cover lunch. The Nonprofit Resource Center provided staff planning and organizing time. Local funders divided the other expenses as a gift to the nonprofit community. Prior to offering the first forum, these same foundations had offered several learning opportunities to the community. The forums' goal is "to bring nonprofits together," stated Wendy Hopkins, Vice President of Programs at the Community Foundation of Sarasota. Hopkins also shared that the forums are an opportunity to inexpensively train board and staff, plus a chance to network and learn some very practical ways to implement new ideas.
(Continued on the next page)



Karen Eber Davis Consulting helps people turn good ideas into exceptional, funded ventures. Since 1994, the firm has helped more than 100 organizations including social service, education, religious, arts, environmental government and healthcare institutions to improve services offered to their customers and strengthen their organizations.

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What's Interesting about the Forums?

“Something was going on in that room that was ‘bigger’ than the sum of all the parts. . .” said Christie Lewis, the event’s current coordinator.

What makes a program, activity or event compelling or, in the case of the forums, a “must-do?” Most often, it is the strategic thinking that went into the activity before it started. Although, this firm did not work with the forum’s design team, it’s fun to look at this event and to talk with them to understand what produced its success and how ideas might be used elsewhere. (Our specialty is strategic thinking work, like this, that can help you identify key ideas and use them to create added value activities for your customers.)

If you are creating or adapting an activity, consider these critical forum building concepts:

- Find a cornerstone concept. In this case: “We made the table topics things people wanted to learn about,” said Hopkins. Interesting topics helped draw participants to each forum. This is key since all forum successes depend on people attending.
- Find support from several groups. Multiple forum

sponsors provided critical funding, increased credibility and excellent marketing support, and reduced the chance of conflict from competing events.

- Include people beyond the usual participants and leaders. In the forum’s case, this included people from additional counties and a cross-section of organizations including those representing social services, arts, religious, governmental and environmental agencies –not only as participants, but also as table leaders.
- Offer participants opportunities to meet their own diverse agendas. At the forum, individuals can learn, network, receive and offer support, etc., all in one place. Several diverse agenda items could be accomplished during each half-day forum.
- Create activities where you can identify a way to cover the bottom line. In this case, not only were expenses covered, the cost was very reasonable for both attendees and supporters. “It provided a lot of bang for the buck,” Mora said.

Adapting the Concept

You can use the forum concept to create an event when you would like to increase learning and networking and where process is as important as learning content. Vary your topics and the skill levels at different tables. The event’s style offers low training costs per person, but do invest time in

planning. Nine months to a year of thinking and preparation is not too much.

When we replicate or adapt ideas to a new setting, we find it extremely helpful to study and interview staff and users of the existing activities. In this case, you can learn more about the forum at the Nonprofit Resource Center’s web site, www.suncoastnonprofits.org, or by talking to Christie Lewis, Director Nonprofit Resource Center at 941-365-8751 or clewis@sarasota-foundation.org. She’s willing to answer questions after your website review. And if you are local, don’t forget to save the date for the next forum, on January 22 at the Chelsea Center in Sarasota.

4 Points to Remember to Replicate the Forum’s Essence

1. Make the table topics something people want to know.
2. Train your facilitators so they focus on adult learners having the chance to share.
3. Think cross-disciplines, cross-geographic and beyond the “usual suspects” for table leaders and participants. Who can you include? Who is a frequently overlooked?
4. In your event, incorporate broad choices, plus network opportunities.

Nonprofit Forum Statistics			
	2002	2003	2004
attendance	187	218	300, goal
price	free	\$15	to be determined
hours	8:30-11:30	8-1	8-1:30
# tables	about 20	22	25+
innovation	event	lunch, keynote	attendees suggest topics, larger facility

Sponsors: The Nonprofit Resource Center, the William G. and Marie Selby Foundation, the Community Foundation of Sarasota and the Gulf Coast Community Foundation of Venice. Collaborative partners: Sarasota County Government and the Manatee Community Foundation.

Resources:

Workshops-in-a-Brochure Publications

How to Run a Great Meeting

“An excellent publication” and “a great help to my board chair, who runs a lovely meeting, but goes on and on” are two quotes we heard about our first workshop-in-a-brochure publication. *How to Run a Great Meeting* is six pages long, gathers information from more than 20 publications and years of leading and attending meetings. You can read it in 30 minutes and use the information 30 times a year. Why not order a copy for all of your volunteers and staff who run meetings?

How to Find Great Help

In this workshop-in-a-brochure, you will find a guide to assist you in enlisting the help you need, including volunteers and employees. What steps can you take to ensure your getting a “yes” when you ask for help? What can you do if no one wants the job? How do you ask so that you get a dependable answer? Essential reading and thinking for anyone looking for help. 10 pages.

Local Sources, More Local Sources, 2002-2003 Editions



Local Sources is an easy-to-use, in-depth grant reference for Charlotte, Manatee and Sarasota Counties, Florida. It lists deadlines, contacts, application requirements, board members and amounts funded for more than 100 grant sources.

The companion edition, *More Local Sources*, contains a list of 150 funders who do not meet the size or other criteria to be in *Local Sources*, but are of interest to many development offices.

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Added Value: Synergies of the Nonprofit Forum

Great activities provide synergies throughout and beyond the organization. The Nonprofit Forum is no exception. Here is a partial list of the event's win-win synergies:

- In 2002, the Nonprofit Resource Center (NRC) was just starting. The first forum became a community-wide introduction to the Center that created positive expectations about its future work.
- At the time of the event, the new NRC was developing an extensive mailing list. The event used and grew this list to market the forum.
- Forum evaluations allowed the NRC to identify new speakers and topics for its future workshops.
- The forums provided opportunities to explore mini-topics that didn't warrant full blown workshops, but still met community educational needs.
- When the initial forum was designed, the University of South Florida was actively seeking ways to increase its participation in the nonprofit community and get the word out about its new Certification in Nonprofit Management. The event provided a vehicle to help the University to achieve both these objectives.
- The event supported area nonprofits with identifying themselves as belonging to a larger region, that often has not seen itself as one.
- The event modeled collaboration, an ongoing trend of interest.

Organizations that survive and thrive are those that manage simultaneously to create consistently superior values for many groups including customers, volunteers, funders, present and future employees.

—paraphrased from Jean Phillippe Deschamps, and R. Ranganath Nayak, *Product Juggernauts*