Coalition U: Storytelling
Tuesday, April 15, 2014
11:30am – 2pm
Independence Blue Cross
1901 Market Street, 23rd Floor (23-F)

We are live tweeting!
Follow @CoalitionU & Tweet Using #CoalitionU

Hostess
Rev. Dr. Lorina Marshall Blake
President, Independence Blue Cross Foundation

Agenda

Opening Remarks
Arun Prabhakaran
UAC Vice President

The Power of Storytelling
Rev. Dr. Lorina Marshall Blake

How to Tell Your Story
Timothy N. Spreitzer
Senior Vice President, Tierney

Kate O’Neil
Account Director & Social Media Strategist, Tierney

Putting the Story in a Letter
Deborah S. Hoxter
Director, Corporate & Foundation Relations
Dunleavy & Associates

Closing Remarks
Felicia Harris
UAC Marketing Communications Coordinator
About Coalition U
The Urban Affairs Coalition re-launched its capacity building initiative, Coalition U, in 2014 to help nonprofit organizations strengthen their infrastructure, build capacity, and maximize community impact. Coalition U offers a variety of capacity building seminars and workshops focused on improving nonprofit organizational growth and development to make effective changes in the communities they serve. To learn more about Coalition U, please email us at CoalitionU@uac.org

About the Urban Affairs Coalition
The Urban Affairs Coalition unites government, business, neighborhoods, and individual initiatives to improve the quality of life in the region, build wealth in urban communities, and solve emerging issues. We are a Coalition of 65+ partner organizations, large and small, working on diverse issues that immediately affect communities. We strengthen nonprofit organizations through fiscal sponsorship, capacity building, and program evaluation; improve life chances for youth and young adults; and provide economic opportunity to low-income households, working families, and disadvantaged businesses.

What We Do
The Coalition shapes public policy and delivers programs that respond to urgent community needs. The problems we face are far too complex for one entity to solve on its own. Our deep community roots and strong linkages to public and private groups allow us to bring together a diverse set of resources around specific issues to drive change from the ground up. The Power of Coalition means that, together, we can accomplish what no one organization can do alone.

Our Priorities
- Strengthening nonprofits
- Building wealth in urban communities
- Developing youth and young adults
- Creating strategic partnerships

To learn more about the Coalition and its partners, please visit www.uac.org or call 215-851-0110.

Question about upcoming Coalition U Workshops? Email CoalitionU@uac.org

Primary Contact – Coalition U
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Primary Contact – UAC Fiscal Sponsorship & Partnership Opportunities
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**Hostess Biography**

Rev. Dr. Lorina Marshall-Blake  
*President*  
Independence Blue Cross Foundation

Rev. Dr. Lorina Marshall-Blake is Vice President of Community Affairs for Independence Blue Cross and also President of the Independence Blue Cross Foundation.

She is an expert in Corporate Management, Public Relations and Communications. Marshall-Blake’s decisions not only have a major impact on Blue Cross’s over 3 million subscribers, but the multi-billion health insurance industry as a whole. Her responsibility is to ensure that decision makers, at the highest levels, have a clear understanding of Blue Cross’s goals and objectives and its commitment to subscribers. In 1991, Marshall-Blake began her role at Blue Cross working with the local, state and federal legislators, and agencies on matters relevant to Independence Blue Cross.

Marshall-Blake has 35 years of experience in corporate management, public relations, and communications. She began her professional career as an administrative assistant working in major corporations in the Philadelphia area. In 1980, Marshall-Blake worked as assistant to the president of Philadelphia Gas Works. In 1988, she was promoted to Vice President of Government and Community Relations at Philadelphia Gas Works.

Marshall-Blake grew up in the Philadelphia area. She is one of five children. She received a Bachelor of Arts degree in Human Services from Antioch College and a Master of Arts in Government Administration from the University of Pennsylvania. She is presently studying at Palmer Theological Seminary for a Master of Divinity degree. On May 20, 2007, she received an Honorary Doctorate of Humanities from Albright College in Reading, Pennsylvania.

In addition to her corporate responsibility, Marshall-Blake serves as an associate minister at the Vine Memorial Baptist Church.

Marshall-Blake exhibits a strong commitment to the community. She is people-centered, highly motivated, and uses a participatory approach to problem solving. She is affiliated with over 30 professional and civic organizations. Among her affiliations are the United Negro College Fund, Greater Philadelphia Chamber of Commerce, Blue Cross Blue Shield Association Federal Affairs Committee, Urban Affairs Coalition, and the Governor’s Patient Safety Authority. She is also affiliated with 2000 African American Women, the Community College of Philadelphia, National Coalition of 100 Black Women, and a member of Alpha Kappa Alpha Sorority, Inc.

Marshall-Blake says, “We have to take knowledge and pass it on. We must mentor our young men and women. We must reach back and give.” In her community, she serves as a mentor to eight “daughters,” a group of young adult women who are in the process of establishing their careers.

Marshall-Blake has three children: Julian, Chawnda, and Jamila and one grandchild, Jamile.
Presenter Biographies

Tim Spreitzer

tspreitzer@tierneyagency.com

Senior Vice President
Tierney

Tim Spreitzer joined Tierney in 2008 with a strong background in communications and policy work at the city, state and federal levels. As Senior Vice President of Public Relations at Tierney, Tim leads a variety of accounts, including Independence Blue Cross, NiSource Gas Transmission & Storage and the Pennsylvania State System of Higher Education. Tim also leads Tierney’s crisis and issues management practice, where he helps provide communications strategies for numerous local and national organizations facing a variety of situations including mergers and acquisitions, abrupt management changes, labor disputes, and major litigation. In this role, Tim’s experience runs the gamut, from serving as spokesperson for companies under intense media scrutiny to advising organizations on how to handle issues in social media.

Prior to joining Tierney, Tim served as the Communications and Policy Director for the Dwight Evans for Mayor campaign in Philadelphia, where he helped craft message, policy and strategy in a dynamic race for mayor of the 6th largest city in the nation. Prior to that, Tim was the Deputy Chief of Staff at the School District of Philadelphia, where under CEO Paul Vallas, he led the communications and government relations teams in helping tell the story of one of the most dramatic and successful reforms of any large urban district – reform that resulted in nine straight years of test score growth. Originally from Chicago, Tim also served as an Education and Workforce Policy Advisor for the Office of the Governor of the State of Illinois. Tim earned his bachelor’s degree from Western Illinois University and his MBA from St. Joseph’s University in Philadelphia.

Tim has served as a “Big Brother” through the Big Brothers/Big Sisters program for several years. He and his wife Cheryl reside in the Art Museum area of Philadelphia.

Kate O’Neil

ekoneil@tierneyagency.com

Account Director, Social Media Strategist
Tierney

Kate is an Account Director and Social Media Strategist at tierney, where she provides comprehensive public relations support for TD Bank, Independence Blue Cross, The Salvation Army of Philadelphia, and Girl Scouts of Eastern Pennsylvania. Kate specializes in consumer market communications strategies, social media, brand management, non-profit and behavioral healthcare communications.

Kate conceptualizes and manages strategic plans that communicate client business objectives, guide brand development and reach target audiences through traditional and non-traditional media relations. Kate has written and implemented social media strategies for multiple clients, including McDonald’s, TD Bank, PECO, The Salvation Army of Philadelphia and Girl Scouts of Eastern Pennsylvania.
Throughout her career Kate has managed many new product launches, as well as coordinated fundraisers and various events while managing junior account members. Kate also has experience in B2B communications through project management for Bayer Environmental Science, having worked specifically with the TopChoice brand.

Kate gained additional experience through participation in the 4A’s Institute of Advance Advertising Studies (IAAS) January - April 2010 and worked on a mock new business "pitch" with a team comprised of top up-and-coming agency executives in the Philadelphia region to develop a fully integrated marketing campaign for Pepperidge Farm Goldfish.

Kate first joined tierney as an intern in June of 2007, after graduating from East Carolina University in May of 2007 with a B.A. in Communications and a minor in English.

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Deborah S. Hoxter
dhoxter@dunleavyassociates.com
Director, Corporate & Foundation Relations
Dunleavy & Associates

With a broad background in advertising, sales and nonprofit fundraising, Debi is a high-energy, results-oriented professional who excels in cultivating and maintaining long-term relationships with individuals throughout the region. As Director, Corporate & Foundation Relations at Dunleavy, Debi works with clients to build donor and corporate relationships and create strategies for meeting revenue goals.

As Executive Director, Corporate Underwriting at WHYY, Debi created targeted, successful partnerships, both on- and off-air, each designed to “match the mission” of the funder while meeting key objectives for all involved. In addition, she provided revenue, planning and implementation oversight for WHYY’s largest annual fundraising event.

Prior to her work in the nonprofit sector, Debi was Advertising Sales Manager at Philadelphia Magazine and Account Supervisor at Ketchum Advertising in Philadelphia and Washington, DC. She began her career at Ted Bates and Grey Advertising agencies in New York.

Debi is a graduate of the University of Pennsylvania where she received a B.A. in Political Science and an alumna of LEADERSHIP Philadelphia.
The Power of Storytelling!

- While storytelling is not the only way to engage people with your ideas, it’s certainly a critical part of the recipe!
- A compelling story inspires people to get involved and gives them a reason to
- Stories powerfully connect us to our listeners.
- When we share our own real-life stories or the stories of others our audiences feel that they get to know us as authentic people – people who have lives outside the corporate setting, people who have struggled with problems and who have figured out how to overcome them.
- Stories trigger the ancient human muscle of the imagination.
- The use of stories, properly conveyed, is actually how people prefer to receive communications.
- Donors and the public want to know your organization’s inputs and outputs but more importantly they want to hear about your outcomes – those stories that are at the root of why your organization does what it does.

Recommended Articles to Read:

How to Get Started in Storytelling for Fundraising – Cara Jones Interview

Stories to Inspire – Sara Batista
http://storiestoinspirefilms.com/the-power-of-a-compelling-story/

The Power of Storytelling: 4 Weeks to Engage Board and Staff as Passionate Fundraisers
http://www.clairification.com/power-storytelling-4-weeks-engage-board-staff-passionate-fundraisers/

Beyond Fundraising: The Real Power of Storytelling
http://www.creationincommon.com/beyond-fundraising-the-real-power-of-storytelling/
Presentation #1 – How to tell your story

Timothy N. Spreitzer
Senior Vice President
Tierney

Kate O’Neil
Account Director, Social Media Strategist
Tierney

See attached for full presentation.
Organizational Storytelling: Breaking Through the Clutter

Tim Spreitzer, SVP
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Urban Affairs Coalition
Philadelphia, PA
April 15, 2014
So, how do you break through?
Build an emotional connection

You must emotionally connect your audience to your message; give your stakeholders a reason to act.
“P&G understands the importance of building an emotional brand connection with their customers. They also know their target audience well and what makes them feel.”

- Colin Shaw
CEO, Beyond Philosophy
Starts with great storytelling

#1
Put your audience first

Constantly ask “So What?”

Improved efficiency

Met the goal; more to do

More people will be served this year

How many people are still in need?
Starts with great storytelling

#1 Put your audience first

#2 Lead with your message

Key Message

- Anecdotes
- Examples
- Details
- Facts
Starts with great storytelling

#1 Put your audience first

#2 Lead with your message

#3 Keep it simple
Starts with great storytelling

#4 Give it 3 parts

Opening  Body  Closing
Starts with great storytelling

#4 Give it 3 parts

#5 Introduce a villain & hero

#6 Use visuals when you can

#7 Repeat the take-away
Putting it into action.
The Salvation Army of Greater Philadelphia used story telling to help raise awareness and drive donations to support its summer programs through the “Christmas in July” campaign.
Questions?

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hellotierney.com
Putting your story into an Appeal Letter

Deborah S. Hoxter
Director, Corporate & Foundation Relations
Dunleavy & Associates

Best Practices for Annual Appeal Letter Creation:

- Develop a theme that will “set the stage” for your story
- Create a strong opening sentence, or begin with an impactful quote that signals this is why you should care about the organization and support it
- Make your letter personal, speaking directly to the donor and drawing him in
- Include the organization’s mission and accomplishments over the past year
- Connect the reader emotionally to your mission through a compelling success story that “personifies” the mission:
  - Highlight an individual whose life has been changed dramatically as a result of your organization’s work
- Include 3 very clear asks throughout the letter, and create a sense of urgency
- Make it easy to give: Include a remittance envelope, as well as directives for online giving
- Make the donor the hero

Tactics That Work:

- Use variable data (e.g. “Dear John” vs. “Dear Friend”) if budget permits
- Include photos or images within the letter and on outer envelope
- When stating the ask, indent paragraphs, use bolded lines, italics, underline
- Once you’ve written a draft, read the letter out loud to others to ensure that you have the proper tone
- Use outer envelope to create a sense of urgency and to set your letter apart from others (e.g. “Help us continue our important work. Please make your gift by December 31, 2013”)
- Personalize as much as possible
  - Have Board write notes on letters to their contacts and other donors
Sample Appeal Letters
Without Community Partnership School, I wouldn’t have learned half of the things that I know; I wouldn’t be in the school I’m in; and I wouldn’t be the person that I am today. I am thankful to Community Partnership School for helping me become who I am.

— CPS graduate, Nasir, pictured at right with Director of Enrollment, K. Linn Vaughters

October 2013

Dear Friend,

These words, spoken with confidence and maturity, come from Nasir, one of Community Partnership School’s original students and a member of its first graduating class in 2011. Nasir now attends William Penn Charter School, a highly competitive independent school in Philadelphia.

Faced with family challenges and coming from one of the most underserved neighborhoods in Philadelphia, Nasir craved the direction and supportive environment that CPS offers, and his growth and success at the school were immediate. By nurturing his independence and inquisitiveness, CPS—in partnership with Nasir’s parents—helped him gain the confidence he needed to flourish. He excelled academically, and he participated in all that CPS had to offer, including the enriching After School Program, where he learned how to swim—a skill that enabled him to participate on Penn Charter’s diving team last winter.

Now an 8th grader at Penn Charter, Nasir is thriving. New demands and challenges will arise as he approaches high school, and he will continue to benefit from his association with CPS. His long-term success will be further ensured via sustained support from our Alumni Program that tracks each student’s progress and maintains close contact with their placement schools. The Program was instrumental in helping Nasir adjust to a new middle school and will facilitate on-going engagement, with Nasir and his family, as they move through his high school years and beyond. (Continued on reverse)

BY THE NUMBERS
7:1 ratio of student to teacher
80% qualify for free or reduced priced meals
60% come from single parent/guardian homes
10-hour academic days include Monday-Friday After School Program
$10,000: Instructional cost per student
$2,000: Parenting and After School cost per student
35 Students currently enrolled in the Alumni Program

Please help us provide students like Nasir with the education and tools to truly make a difference in their lives. Kindly make your gift to Community Partnership School today.

Yes! I want to help support Community Partnership School.

NAME __________________________________________

ADDRESS _________________________________________

CITY ___________________________ STATE ______ ZIP ______

PHONE __________________________

EMAIL ____________________________

(Please provide email address so we may send communications electronically.)
From its modest beginning in 2006—with only 34 children in grades pre-K, kindergarten and 1st—to a robust 91 children in grades pre-K through 5th and 35 alumni in 2013, Community Partnership School provides students from some of the lowest-income neighborhoods in Philadelphia with the highest quality education. Our students are nurtured, challenged, and exposed to experiences that they might not have had if they had not attended CPS, preparing them to confidently open the doors of opportunity and pave the way for a bright future—the kind of future every child deserves.

Our key to success lies in our name. Parents and guardians are partners in their children’s education, actively participating in programming designed to help them ensure their children’s success, both at home and in school. We strive to create a community within the school in which our students, families, staff and volunteers grow and learn together. By cultivating this close-knit community and implementing extensive support systems, we ensure that each student realizes his/her best self.

We ask you now to invest in the future of our students. Community Partnership School has always done more with less. It is only through the generous contributions of individual donors, foundations and corporations—people like you who have stepped up to partner with us—that we have been successful. Your support is vital to us, accounting for more than 95% of funding for operations. We need your continued backing to expand on the intensive instruction and comprehensive personal support we offer our families.

Your donation is essential to our work. Please make your gift today in the enclosed envelope, and help Community Partnership School continue to provide a high-quality, holistic education to students like Nasir.

With heartfelt thanks for your generous support,

Eric C. Jones, Head of School          Lynn Gadsden, Board Chair

☐ I/We join the Community Partnership School community in shaping strong learners positioned for lifelong learning.

☐ $50 ☐ $100 ☐ $150 ☐ $250 ☐ $500 ☐ $1,000 ☐ $2,500 ☐ Other $________

Please charge my credit card ☐ Visa ☐ Mastercard

CARD #       EXP DATE  3 DIGIT SECURITY CODE

☐ THIS GIFT IS IN HONOR OF

☐ THIS GIFT IS IN MEMORY OF

☐ THIS GIFT WILL MULTIPLY WITH A MATCHING GIFT FROM

☐ My check made payable to Community Partnership School is enclosed.

United Way donor choice number 16200 For more information, contact us at 215-235-0461. Visit www.communitypartnershipschool.org to donate online.
November, 2013

Dear Friend

“Who was Fred?” It’s a question I am often asked by families who receive funding from Fred’s Footsteps, but it’s an incredibly complex question to answer.

When you speak to my dad’s close family and friends, we won’t tell you about a legacy of awards, but rather the people he individually impacted. As captivating as he was in front of 500 people, his best moments were one-on-one. He simply loved people. He wasn’t just charismatic; he was compassionate, warm, loving.

Today, when I think about what would make my father proud of the work we are doing in his memory, it is without a doubt the people that we are helping, the lives that we are touching. He would have loved to have been here to listen to their stories or share an encouraging word. He would have wanted to make each child smile. But, most of all, he would have loved to have been able to sit down with each family and ask, “How can I help?”

Since 2005, Fred’s Footsteps has carried on my dad’s legacy of compassion and a desire to help others by providing financial support to over 400 families caring for seriously injured or critically ill children.

More >

YES, I want to support Fred’s Footsteps.

☐ I/We join Fred’s Footsteps in offering financial support to these very special families struggling to stay afloat while caring for a seriously ill or injured child.

Name _____________________________________________________________

Address __________________________________________________________

City __________________________ State _________________ Zip ___________

Phone ________________________________

Email ________________________________

(Please provide your email address so we may send out communications electronically.)
At Fred’s Footsteps, we work directly with each family to identify where we can make the biggest impact and provide the most relief so that they can care for their child.

We have provided over 850 months of rent and mortgage payments for families who would otherwise have had to choose between being at work or staying with their sick child; we have paid 365 utility bills; 145 car payments; and we have improved home accessibility for over 20 families and safe transportation for over 25 families.

As one social worker said, help from Fred’s Footsteps “means the difference between staying with your child, bonding with your child, and supporting your child through hospitalization. It often means—especially for some kids who really have a life-limiting illness—that parents have time to stay with their child in the hospital while they are dying or as the prognosis is figured out. It’s priceless. Fred’s Footsteps helps families make that decision easier.”

Our families are hardworking. They take pride in providing for their family. But, when tragedy strikes, they often find themselves without a safety net and without anyone to turn to. That’s where Fred’s Footsteps comes in. As my dad’s best moments were one-on-one, so are ours. At Fred’s Footsteps, we work directly with each family to identify where we can make the biggest impact and provide the most relief so that they can care for their child.

This lifeline that Fred’s Footsteps provides is not possible without financial support. In order to continue to offer assistance to these deserving families, we need your help.

Please consider supporting our mission and touching the lives of these very special families struggling to stay afloat while caring for a seriously ill or injured child.

Thank you for your investment in changing lives.

All the best,

Christine DiBona Lobley
Executive Director

[Footer with donation form and United Way donor choice information]