



national committee for
responsive philanthropy

THE POWER OF RELATIONSHIPS: NORTHWEST OHIO COMMUNITY SHARES

August 2004

National Committee for Responsive Philanthropy

2001 S Street NW, Suite 620 • Washington, DC 20009

Phone 202.387.9177 • Fax 202.332.5084

E-mail: info@ncrp.org • Web: www.ncrp.org

About NCRP

The National Committee for Responsive Philanthropy is an independent nonprofit organization founded in 1976 by nonprofit leaders across the nation who recognized that traditional philanthropy was falling short of addressing critical public needs. NCRP's founders encouraged foundations to provide resources and opportunities to help equalize the uneven playing field that decades of economic inequality and pervasive discrimination had created. Today NCRP conducts research on and advocates for philanthropic policies and practices that are responsive to public needs.

For more information on NCRP or to join, please visit www.ncrp.org or call (202) 387- 9177.

The Power of Relationships: Northwest Ohio Community Shares

by Randy Stoecker

PREFACE

by Kevin Ronnie

This report is a history of the creation of Northwest Ohio Community Shares, a coalition of local social justice and social service agencies that came together to create collectively what was denied to them separately, the opportunity to solicit workers for payroll deduction contributions at Toledo workplaces.

It is an inspiring story. These individuals and charities overcame numerous obstacles, including the active opposition of one of their community's most powerful and respected institutions, the United Way. This group of community activists displayed grit and determination in pursuit of their belief that workplace philanthropy should offer donors the opportunity to support the charity or issue of their choice, including nonprofits that advocate for social, economic and environmental justice.

But there is much more to this story than the experiences of one determined band of charities and activists in one mid-sized industrial city in America's Midwest.

Workplace giving has been part of the American scene for well over one hundred years. At its inception, workplace giving was nothing more than simply 'passing the hat,' an informal tool that workers used to support co-workers and their families in times of need. To this day these authentic expressions of concern and support continue in workplaces large and small. Workplace giving has always been a reflection of people at their best, helping friends, co-workers, and communities in need.

The informal nature of workplace giving began to change as it was institutionalized. Although initial efforts at consolidating workplace giving for charity occurred earlier, most notably in Cleveland in 1912, World War I was the major spark that fueled this transition across the nation. Charities engaged in war relief activity were brought together to fundraise collectively, much of it done at the workplace. Organized labor also contributed significantly to the development of workplace giving as a tool that could be used for charity. The success of unions in negotiating 'check-off' for collection of their members' dues during the 1930s and 1940s accustomed workplaces and workers to the practice and ease of payroll deduction.

These two elements, charities collectively raising money at the workplace and the utilization of payroll deduction, are the hallmarks of modern workplace philanthropy.

Over the decades immediately following World War I, many different charities, including health charities and the American Red Cross, conducted their own workplace campaigns. But beginning in the

late 1940s, these two components were gradually consolidated under the control of local Community Chests, the predecessor of the organization that we know as the United Way.

The Community Chests' consolidation of workplace giving transformed workplace giving from a tool that allowed individual workers to support people, charities and needs to which they personally felt connected, into a tool that elite business and community leaders used to fund charities that they had pre-selected as important for the community. The key component that the Community Chest / United Way added to workplace philanthropy was that it took the decision making by which charity received the money out of the hands of the donors and replaced it with a centralized decision-making model.

The success of the United Way movement was such that by the early 1960s it had effectively consolidated control over workplace giving across the nation. From this point forward workplace giving was considered a United Way monopoly. With their mainstream corporate and community elite dominated boards setting the priorities for how the money would be used, this also effectively meant that charities that did not fall within a fairly narrow definition of direct health and human service provision were unable to receive support from workplace donors.

In a sense, it was United Way's success at securing monopoly control of this community resource that prompted the development of groups like Northwest Ohio Community Shares. The failure of mainstream United Ways to effectively respond to the social ferment of the 1960s led many activists and advocacy organizations to openly question the control that United Ways' money gave them in setting community priorities. These activists, along with mainstream national and international charities, also began to question the exclusion of their charities, constituencies and issues from workplace giving that resulted from the United Way monopoly.

But the factor that lent significant weight and strength to the disaffection of these excluded nonprofits and activists were the charitable interests and priorities of workers and donors themselves. Beginning in the 1970s and accelerating through the 1980s and 1990s, more and more donors began to question why they could not choose which charity their contribution would support. This changing reality was borne out in multiple surveys of donor interests that United Ways and others have conducted over the years. Beginning in the 1970s and continuing up into the new century these surveys have consistently demonstrated that donors rate the ability to choose where their money goes as one of the features they want in their charitable campaigns.

The combination of donor demands for choice and the organizing of charities into coalitions that could reach out to those donors made the success of the new workplace funds and federations possible. Access to employees in the workplace does not happen in a vacuum. There needs to be an organized push for donor choice to happen, and the organized push almost always comes in the form of a new workplace fund or federation, on the ground, making waves, demanding the ability to raise money in the workplace from donors.

With 'donor choice' as their rallying cry, local and national activists began cracking the United Way monopoly, beginning in the early 1970s with coalitions of health charities in Connecticut, Nebraska

and Maryland, and with African-American, social justice and women's funds and federations forming in the mid-to-late 1970s in Los Angeles, Philadelphia, and Wisconsin. These new 'alternative funds' (as they were then called) began to agitate and lobby for access to both public and private sector employers. Despite sometimes aggressive opposition from United Ways, these early funds and federations began achieving success.

Beginning in the early 1980s, these local examples of success, coupled with the visible fight to open the Combined Federal Campaign, the Federal Government's employee charitable giving drive, led to a surge in the creation of new local and national funds and federations. In 1979 there were no more than 15 local and two national funds and federations, which that year raised approximately \$35 million dollar. By 2002 there were more than 200 national and local federations in the United States and Canada that collectively raised more than \$222 million dollars from workplace donors.

It was the work of the early pioneers and their funds and federations that underlies the success of Northwest Ohio Community Shares. In the success of Northwest Ohio Community Shares documented in this report, we can find echoes of the start up experience of each and every fund and federation that preceded them, and we can learn lessons for those that will follow: the determination to succeed, the refusal to quit, and the commitment to working together for the benefit of donors, social justice nonprofits, and the entire community.

Summary

It is difficult to summarize the history and analysis of an organization as dynamic and complex as Northwest Ohio Community Shares (NOCS). Here I will attempt to offer some basic highlights of the report itself.

The History of NOCS:

- NOCS formed in 1997 out of the frustration of a number of organizations that were unable to receive United Way funding, particularly Planned Parenthood and the ACLU Foundation of Ohio.
- Early on, NOCS decided that all members needed to have a local presence, pay \$150 in annual dues, and provide 60 hours of volunteer time. The organization created a member-controlled board that also included at-large participants, and a separate advisory board. It created a formula for dividing undesignated funds in reverse order, so that the organizations receiving the least designated funds would receive the most undesignated funds.
- In the early days, it was extremely difficult to recruit both member organizations and gain access to workplaces.
- Relations with United Way were challenging, as high-level agreements were not implemented at lower levels of United Way, and rumors swirled around how NOCS would impact United Way receipts.
- In 1999, using an organizing lobbying strategy, and with help from sympathetic public officials, NOCS finally achieved access to the city of Toledo and Lucas County employees.
- In 2000, NOCS received a \$25,000 grant from the Stranahan Foundation, which allowed NOCS to hire a part-time director. The Stranahan Foundation later increased its funding, allowing the director to go to full-time and add a part-time staff assistant.
- Gaining access to workplaces, getting full-time staff, and then gaining new organization members led NOCS to revise its public presence, with a new mission statement and logo.
- The 2002 workplace campaign brought in more than \$110,000--from more than 21,000 employees--to be distributed across 23 organizations.

Creative Tensions within NOCS

- NOCS is regularly challenged with how to balance its role as an activist organization charged with transforming the Toledo philanthropic scene with its mission as fund-raising organization. It emphasizes cooperation whenever possible and avoids public critiques of United Way, while still engaging in careful negotiations with United Way around joint campaigns.
- NOCS originated with social justice organizations, but the membership mix also includes arts and social service organizations. To maintain unity, NOCS uses broad definitions of social justice and emphasizes the unity of the group in its workplace campaign policies.
- The diversity of NOCS members means that some organizations are better positioned to contribute volunteer time and administrative participation than others. NOCS balances the potential inequalities by requiring that organizations contribute dues and 60 volunteer hours to receive undesignated funds. Members also emphasize that belonging to NOCS can result in public exposure as well as money.
- There is a healthy competition for funds in NOCS, with a rivalry between the "animal groups" and the other social justice, public policy and social service organizations. There is also continual discussion about the appropriate "economy of scale" for NOCS-how many organizations to have compared to the number of workplaces being accessed.
- With 23 member organizations, all participating on the NOCS board, there are concerns that decision-making could be cumbersome. At the same time, there is no strong support for moving to a representative decision-making forum. Instead, NOCS works to make its meetings as efficient as possible without cutting off debates too quickly.

Introduction

"I haven't lived in a lot of other places, but I know quite a few people who have moved away from Toledo and came back, or came from other places and stayed. It seems like the friendships and personal bonds that people form here are significant. Maybe it's because there's nothing else to do. Community Shares may be a manifestation of the importance of personal relationships in Toledo."¹

It really was an against-the-odds effort. Starting a new organization dedicated to workplace fundraising for groups historically excluded from participation in United Way. Organizing the process so that it emphasized grassroots rather than elite control. Making sure that social change was a prominent part of the mission, rather than limiting access only to social services.

Northwest Ohio Community Shares started late, becoming the fourth Community Shares program in Ohio, after Cleveland, Columbus and Cincinnati. Like the other Ohio Community Shares, and unlike the majority of Community Shares started since the late 1980s, NOCS focuses its efforts on a single urban area rather than on a state or region.

For nearly three years, it was questionable whether the effort would succeed at all. But since NOCS achieved access to its first Toledo workplace, it has become known as the fastest-growing Community Shares in the country.

These pages will attempt to understand the history and trajectory of Northwest Ohio Community Shares in its struggle to open up workplace giving in greater Toledo. And while it will offer lots to think about, much of the explanation may come down to the importance of personal relationships. Toledo is a city of just a little more than 300,000 people, but it is impossible to find a more small-town culture. The commitment people make to this place is unsurpassed anywhere in the country. It is this culture of personal relationships, and the sense of mutual commitment required to sustain such a culture, that makes NOCS more than money.

Methods

This research is based on a variety of methods, including document analysis, interviews and participant observation. Through the gracious cooperation of NOCS board and staff, I was able to review minutes from board meetings and executive committee meetings, and from the past two workplace campaigns. I was also allowed access to the personal files of two longtime board members containing organizational correspondence, press clippings, grant reports and other documents.

I conducted 21 interviews. Those interviews included more than half of the current NOCS board members, roughly equally divided between longtime board members and more recent board members, and the NOCS director. I also interviewed founding board members who are no longer involved with NOCS, and representatives of three workplaces where NOCS now conducts workplace campaigns. Finally, I attended three regular NOCS board meetings, allowing me the opportunity to see the organization in operation.

In order to assure the validity of the information, I sent interview transcripts to every person interviewed, encouraging corrections and clarifications. I then used those corrected transcripts in a first draft of this report, unattributed, so that people could see their words in context and make further changes. The final step was to insert the recommended corrections for this draft.

Report Contents

This first section of the report focuses on the history of NOCS, tracing its trajectory from 1997 to the present. I will pay special attention to the different issues faced by the organization at different stages in its development. In the early years, this included identity development and organization structuring. In the middle years, issues included struggles for workplace access. Most recently, it includes questions about growth management.

The second section of the report focuses on "creative tensions" within NOCS. All social change efforts, because they are trying to create change, cause tensions both with external groups and within groups trying to create the change. Sometimes those tensions can become so great they destroy an organization. But in other cases, such as with NOCS, the tensions become part of a creative process that leads to organizational innovation. Hence, they are "creative" rather than "destructive" tensions. The innovations that result from such creative tensions are not complete in all cases for NOCS, and each subsection will explore the creative thoughts of NOCS participants regarding different organization innovations. Because NOCS members are in the best position to decide what creative routes to pursue in gaining the greatest benefit from those tensions, this report will not make any recommendations, but will merely lay out the options currently expressed during meetings and interviews.

“We went into it with wonderful high hopes, and from my experience I knew Planned Parenthood was never going to get into United Way. We had two rejection letters from United Way in 1966 and 1968, two years apart, and they both said exactly the same thing. They didn't even write a new letter.” [Betty Morais]

In the Beginning

The Early Team:

NOCS began to sprout with a small group of people in 1997 out of a sense of frustration. That frustration would quickly translate into action and a connection with Kevin Ronnie from the National Committee for Responsive Philanthropy (NCRP).

“I was on the Planned Parenthood board, and we weren't getting help from United Way, and I was on the ACLU board and we weren't getting help from United Way. I was on the FOCUS board and we were noticing lots of groups not getting United Way support. I went to Cincinnati and they were in their second year with a new community fund. Their director, Mary McCoy, said there was a group in D.C. that helps alternative fund groups start up. I called Kevin Ronnie and he came out, and I got an ACLU person and a Planned Parenthood person there. It was Planned Parenthood, the ACLU and FOCUS at the beginning.”²

The involvement of Planned Parenthood was important, as their proactive approach to family planning and emphasis on reproductive choice has often led United Way to eliminate the group from consideration for United Way's funding pool. The ACLU was another organization dropped from consideration because of United Way's anti-activist culture.

NOCS would quickly expand with the involvement of Samaritan Counseling Center, the Equal Justice Foundation (EJF) and the Lagrange Development Corp. Toledoans United for Social Action, a local chapter of a national community organizing network, also considered joining, but did not, because they had a different fundraising model that emphasized door-to-door solicitation. Other organizations wooed by the group were pulled away by United Way promises of inclusion that ultimately turned out to be false.

Challenges from United Way would be continuous, and understandable. Community Shares represented a departure from United Way in a number of important ways. First, in contrast with United Way's elite-led process using centralized planning to prioritize and fund programs, Community Shares is structured to be led by the funded organizations themselves and to give donors direct control over which charity receives their support. Second, while United Way strictly avoids groups with a social change or social justice agenda, Community Shares embraces such groups. The differences are important. United Way represents a philanthropy process that preserves the status quo, not just in workplace giving but also in the structure of power itself. Community Shares represents a philanthropy process that challenges both the structure of giving and the structure of

power. Community Shares did not threaten just United Way's dominance in workplace giving. It threatened the entire culture of giving and the structure of power in the city.

But the challenges were greater than just resistance from United Way. This was Toledo, a small city without a history of strong philanthropy, except for the notable exception of the Stranahan family. With the demise of the city's corporate headquarters, banks and industrial power after World War II, Toledo became a city lacking in concentrated capital. Asking the city's workforce to contribute to another workplace campaign was a risky proposition.

But this was an extraordinarily committed group used to fighting against the odds. Wendy Jerome, minister at the First Unitarian Church of Toledo, was a tireless participant in social justice causes in the city. Betty Morais was a well-known and highly regarded leader in Planned Parenthood, and was described as the "elder statesman" of the group. Terry Glazer had helped revive a local community development corporation from near death and brought a wealth of organizing experience. Sandy Craig was a driving force in the local ACLU through its frequent ups and downs and brought legal experience. Though a newcomer to Toledo, Bill Senhauser, then executive director of the Equal Justice Foundation, immediately developed a reputation as a tough social justice litigator and also brought legal experience. He would draft the documents that allowed NOCS to fairly quickly achieve its 501(c)(3) status. Nancy Myers, who was president of the Collingwood Arts Center, became involved after meeting Bill Senhauser through their mutual involvement in the Old West End Association. Mike Ferner, who arrived later, had come within a hair of being elected mayor of the city on a social justice platform, and had devoted his entire adult life to social justice work. He brought connections to public officials, city administrators and city unions. The complementary talents of this group were important. Developing an organization to access hundreds of thousands of dollars through tens of thousands of employees would require such a complex mix of talents.

Building an Organization

The early days were focused mostly on deciding the policies that would guide NOCS and attempting to recruit other groups to the effort. There were many thorny policy issues involved in such a start-up effort:

- **Who could be a member?** There were many issues in deciding who could be members. Should they be required to have a local office? Or would having a "local presence" be enough? Could members receive funds from other sources, such as United Way or tax revenues? Were members required to be grassroots and have a social change mission? Since the ACLU did not have a fully staffed formal local office at the time, and was

**"I think it's harder to make a Community Shares work in a smaller community. My worry starting was this is fine for Cleveland or Columbus. But this was Toledo."
[Bill Senhauser]**

a founding member, the group decided that an organization must only have a local presence to be a member, but there was strong encouragement to have a local office. They also decided that members could not be involved in other workplace campaign federations, but did not rule on whether they could receive other sources of funds.³ They conducted extensive research in deciding whether to keep NOCS focused on small and nontraditional grassroots organizations, seeking advice from experts such as Dave Beckwith from the Center for Community Change and Kevin Ronnie of NCRP. Kevin Ronnie was concerned that there may not be enough social justice groups in the area to build a strong organization.⁴ They researched other Community Shares in Boston, Cleveland,⁵ Colorado,⁶ Tennessee,⁷ and Wisconsin,⁸ learning that all of them emphasized social change but also included service groups under some conditions. They decided to not limit their focus to only social change groups, though they remained philosophically committed to supporting such groups.⁹

- **How would decisions be made?** NOCS members adopted the general Community Shares model, consistent with a participatory democratic approach to philanthropy, of creating a board made up of one representative from each of the member organizations. They also decided to have at-large members to include resourceful people such as Betty Morais in the ongoing decision-making of the organization. They also created a separate advisory board, hoping they could develop better connections to workplaces and funders across the city and build diversity on the board.¹⁰ Early on, they also created "access," "membership," "campaign" and "finance" subcommittees to better guide their efforts to gain access to workplaces, recruit members, plan for workplace campaigns and fund NOCS.

- **What would be required of member organizations?** As a small start-up effort with no funds or staff, members would be required to commit 60 hours of work to the organization as well as pay \$150 in dues yearly. Member organizations were also required to pass a resolution agreeing to the overall terms of membership.¹¹

- **How would money from workplace campaigns be distributed?** Community Shares encourages donors to select, or "designate," specific recipient organizations, but it still allows individuals to make a donation without making such a designation. So much of the discussion focused on how to distribute these "undesignated" funds. The origin of the strategy is unclear, but what the group eventually decided was that half of the funds would be distributed equally and half in reverse order based on the amount of designated funds each organization received. In this formula, the group that received the most designated funds would get one share of the undesignated funds, the next highest designated funds recipient would get two shares of the undesignated funds, and so on. Everyone agreed, though, that to get undesignated funds, groups needed to have their dues paid, have their records complete and have completed 60 volunteer hours.¹² Another thorny issue was how much money to take out for administrative costs. It was

a difficult decision to make in these early days, when the hope of getting any money at all still seemed far off. Kevin Ronnie, of NCRP, recommended taking out 25 percent, but others said 15 percent to 20 percent. They settled on 20 percent, believing it would be little different from 25 percent, and it might look better to the outside world.¹³

Compared to the relatively smooth process of developing organizational policies, recruiting organizations to NOCS was much more challenging. The founders sent a letter to all the nonprofit groups in northwest Ohio, using the public library nonprofit database.¹⁴ It was not a success. In fact, for all the hard work this small group did to recruit other organizations to the fold, they were able to recruit only a small number of organizations. By spring of 1998, the members formally eligible for workplace campaigns were the Association for Children for the Enforcement of Support, the ACLU, the Collingwood Arts Center, the Equal Justice Foundation, the Fund for Migrant Farmworker Justice, FOCUS, the Lagrange Development Corp., Planned Parenthood and the Samaritan Counseling Center.¹⁵ At least two other organizations that agreed to join quickly stopped paying dues, attending meetings and even returning phone calls.¹⁶ Others felt torn by their hopes of receiving United Way support, since they could not belong to both NOCS and United Way. The difficulty in recruiting other organizations is understandable. NOCS was asking groups to contribute both time and money and was not able to promise any return.

Then there was the challenge of trying to get access to workplaces. It is a sign of both the energy and the inexperience of the group that they went full out for every workplace with which they had even a remote connection. In early 1998, they approached the Medical College of Ohio, the city of Toledo, St. Vincent's hospital, the University of Toledo, Bowling Green State University,¹⁷ Lucas County, the Toledo-Lucas County Library, Capital Bank, National City Bank, Owens Community College, Mercy Hospital, Toledo Hospital, the Toledo Board of Education and Fifth Third Bank.¹⁸

They were turned down at every attempt. It is not clear that they were turned down for the same reasons by every workplace, however. A rejection letter from Capital Bank is particularly intriguing, as it refers to "numerous and continuous requests from community organizations outside of United Way"¹⁹ in justifying its rejection. This suggests two possible explanations for the rejection of NOCS' overtures. Some may see it as evidence of a conspiracy supported by the high-level connections between United Way leadership and those organizations. But an equally plausible explanation is that it indicates a lack of understanding about United Way in particular and workplace giving in general. For many people, United Way is seen as a standard keeper. Thus, if you are not part of United Way, you must not be a worthy organization. They do not see United Way's choices as political, but technical. In addition, as we will see, there is a misunderstanding among many employers concerning how much administration is required to

"Someone we courted for a long time then got promised access by the United Way. We lost two or three groups who thought they were going to get into United Way." [Wendy Jerome]

"In the early days, having to put in 60 hours, there was not a big return on the investment. Back then there was no return on the investment." [Terry Glazer]

“We looked at the public workplaces and because we didn’t know where we would have success we tried a shotgun approach. [Mike Ferner]

“We had a really snarly time [getting into workplaces]. Betty kept telling us ‘be nice, be nice.’” [Wendy Jerome]

expand their workplace campaign beyond United Way, and how much impact such a campaign will have on United Way. There are some employers, however, who reject Community Shares on explicitly political grounds. St. Vincent's Hospital, affiliated with the Catholic Church, was approached by Terry Glazer, "but as soon as they heard about Planned Parenthood, they were out."²⁰

In reviewing their strategy, NOCS learned from Kevin Ronnie that public agencies are required to have a written policy stating what kinds of organizations they allow to solicit employees.²¹ So NOCS members began to concentrate their efforts on a select few of the area's public employers: the city of Toledo, the University of Toledo and the Toledo public school system.²² Even here, however, they ran into roadblocks. There had never before been a charitable federation besides United Way attempting to gain access to public employees. Consequently, public employers were not well educated about their legal obligations and they behaved like private employers. NOCS, in response, began an internal debate that continues even today--how much legal pressure to place on public employers to follow the law versus how much effort to put toward engaging in slow, cordial negotiations. We will explore this debate in depth later on, but here is where it first emerged. When NOCS members discovered that both the city of Toledo and the University of Toledo had policies prohibiting any workplace fundraising except by United Way, they began discussing whether to pursue a slow careful negotiation strategy or "sue the bastards." In this situation, they chose to do both, though they stopped short of filing a lawsuit.²³ Bill Senhauser sent letters to both employers informing them of the legal problems with their policies, and others continued with negotiations. But beyond that initial letter, NOCS chose not to engage in an all-out legal battle.

Another blow occurred when NOCS' inability to gain access to any workplaces was highlighted in an August 1998 article in the city's newspaper, which labeled some NOCS member organizations as "controversial."²⁴ NOCS' treasurer, the Rev. Dr. Alan J. Hanson, sent a letter to the editor disputing the characterization, but it was too late. It is unclear, however, how damaging that characterization was. For a broad segment of the population that sees United Way as too conservative, too status quo, and too exclusive, having another giving option that is labeled "controversial" could actually be of benefit. Research regularly cited by Community Shares advocates shows that giving generally increases when there is a Community Shares thrown into the mix. The usual explanation for the rise in giving is that Community Shares offers more choices. But it may be more accurate to say that Community Shares offers different kinds of choices.

These early years were not without success, however. NOCS was able to get involved in the state campaign with the other Ohio Community Shares, giving them their first workplace campaign experience.²⁵ Even this success was not without embarrassment,

however, as NOCS was given the same campaign identification number as the Pickaway County Boy Scouts.²⁶

At the end of 1998, Northwest Ohio Community Shares had assets of \$1,174.²⁷

Dealing with United Way

It is impossible to tell the history of NOCS without also talking about United Way. Even when United Way wasn't directly impacting Community Shares, its presence was. The history of the relationship between United Way and Community Shares is complex. The same Toledo article characterizing some Community Shares organizations as "controversial," also quoted both Bill Senhauser, of NOCS, and Glenn Richter, the executive director of United Way, on their perceptions of the relationships between the two organizations. Both described relations between the two organizations as good. Glenn Richter even went so far as to cite the research showing that the presence of a Community Shares not only does not hurt giving to United Way, but actually may help.²⁸ This relationship had been painstakingly developed from the beginning by NOCS, at the urging of Betty Morais.²⁹ Glenn Richter pledged to "not speak ill" of NOCS.³⁰

But Glenn Richter's leadership was not enough to quell the turmoil that would swirl around the entrance of NOCS onto the Toledo scene. The executive director of a United Way-funded agency told a NOCS board member he had heard that NOCS "will take millions of dollars of funding" away from United Way agencies, that some NOCS members "should not be funded" and that NOCS had filed suit against St. Vincent's hospital for workplace access,³¹ all of which were false statements.

The cooperative relationship at the director level also did not seem to translate to the staff level:

United Way's behavior after our openness with them was disillusioning for me. United Way made promises of cooperation with us, then they switched plans without informing us. For example, about a year into our project, United Way volunteered to print our drive cards for us, delayed and delayed in getting the cards to us, and then, to our surprise, started their campaign, with their cards printed and ours never having gotten to press at all. I believe their duplicity was motivated by decisions to keep power--a few families/individuals in town wanted to keep the power they had through the United Way."³²

As relations between the two organizations remained tense into 1999, representatives of the Stranahan Foundation became involved, particularly Steve Stranahan, whose rep-

utation for savvy and progressive philanthropy was unmatched in Toledo. He was a strong supporter of both United Way and the fledgling Community Shares effort, and began to play the role of intermediary.

"We arranged a meeting with Glenn Richter, one or two of his staff, myself, and Pam Beach, who was executive director of the Toledo Community Foundation at the time. We discussed the background of Community Shares and the fact that Toledo was the only Ohio city without a Community Shares. The purpose of the meeting was to let United Way know that the Stranahan Foundation was going to provide support for Community Shares because they had already been funding their agencies. Glenn Richter sees it all resting on an invitation from an employer, so he sees United Way as having no role in defining who does or doesn't get in-'We are the guest of employers when we are invited in to solicit contributions on behalf of our member agencies.' It became pretty clear at that time that the game was for Community Shares to get invited into workplaces and theoretically there would be a great spirit of cooperation. But in the course of events Glenn Richter retired and when Bob Lucas came in, he didn't know about the arrangement and wasn't brought up to speed by his board. He had to be reminded. You know, if you have a monopoly, you don't welcome competition with open arms."³³

There would be a number of such meetings in the coming years, as United Way and Community Shares continued to invent a relationship. In many ways, it was like inventing the wheel. Like the city's employers, the local United Way also had no experience operating in a context with other charitable federations, and every stage of advance for NOCS required an adjustment by United Way.

Surviving the Early Years

The struggles between NOCS and United Way, the struggles to gain access to area workplaces, and the struggles to get other organizations to join, continued through 1999. By the end of that year, NOCS showed assets of \$1,898³⁴-- nearly a 70 percent increase over the prior year, but still so low that the group decided that existing members should not be required to pay the \$150 membership fee for 1999.³⁵

So for more than two years, at least until mid-1999, there were few signs of hope. That wasn't unusual, as most Community Shares take two to three years to get going.³⁶ What sustains a group over such a long period of time? In many ways, it was a combination of stubbornness, patience and an unswerving eye on the prize.

"In the early days we had no access, no name, no nothin'. We were sustained by the

belief that there were organizations making systemic change in the community that were not going to have access to United Way."³⁷

*"We knew that what we were trying to give birth to would take some time, and we were up against Goliath."*³⁸

We'd keep getting positive information from the national level that giving would go up with another fund. United Way also wouldn't fund small start-ups in the central city that were black and very grassroots. So we were fighting for justice."³⁹

There was also an *esprit de corps* in the group that, while not unique in other Community Shares efforts, was perhaps stronger than could be found elsewhere. Even when there was conflict with one member organization, the rest of the group banded together, and camaraderie remained. Kevin Ronnie notes that, "most places are lucky to have four or five such individuals actively involved." NOCS had its share plus.

*"The thing that struck me as most significant is that it was one of the very few organizations where the people were so much fun to work with. Bill Senhauser had a certain way about him. Betty was always so pleasant. Terry Glazer even smiled occasionally. Bill was irreverent and very committed. I almost dropped out a few times but felt such a loyalty to the other Shares organizers. It was significantly more fun than other groups I have been involved with."*⁴⁰

*"We liked each other. I enjoyed going to those meetings. It was nice being with people from other kinds of organizations. I used to say this is the one meeting I look forward to every month."*⁴¹

And in those early dry years, the members would focus carefully on every step forward, noticing and celebrating each crack in the wall.

*"You don't know how many times someone said, "this is ridiculous." But I will tell you, I'm relentless and I never wanted to give up. ... There were times of great discouragement, like when no one responded to the nonprofit letter. Every once in a while there'd be a teeny break in the clouds."*⁴²

"The up points were actually getting the 501(c)(3), getting ourselves to the point where we could do it. It was also the camaraderie of the group. We merry band tilting at windmills. The downside was it took forever. The United Way guy didn't try to crush us, and that was very gentlemanly. But nobody lifted a finger to do anything to promote what we were doing. It's incremental progress. You take pride in the steps: getting nonprofit status, forming a board, creating your

“It wasn't any help that Finkbeiner was mayor at the time, which was the source of many wonderful jokes from Senhauser. It became kind of a blood feud with Senhauser. We were gonna get into the city, or Senhauser was gonna die trying. [Mike Ferner]

bylaws, preparing your first set of materials, having your first meetings with employers.”⁴³

NOCS had also developed a structure and strategy to make those cracks larger and larger, and it would be this structure and strategy that would ultimately produce success:

“It wasn't “we” should do this and “we” should do that. It was “Mike you will do this and Bill you will do that.” Our rule was that two people went to see every external contact. Betty could be the elder statesman, and I was the heavy. The most important thing was a small group dedicated to making this happen with very direct accountability to one another and the work. We stuck to one another and were directly accountable to one another. It wasn't a 30-person task force waffling around. We were sometimes down to three people at a meeting.”⁴⁴

Success!

In late 1999, the dam began to break, and in 2000, it burst wide open. These were exciting times for NOCS. Almost too exciting. In late 1999, NOCS began making headway with both the city of Toledo and Lucas County, and began working on a grant proposal for the Stranahan Foundation that would support paid staff.

Gaining Access to the City of Toledo

The story of gaining access to the city is one of perseverance and strategy. The effort began in earnest in early 1998, and resulted in a letter from Mayor Carty Finkbeiner to Bill Senhauser, rejecting NOCS from participation. The letter urged NOCS to approach the Chamber of Commerce and the United Labor Committee for their endorsements before coming back to the city. It also set three standards for inclusion in the city's workplace campaign: NOCS must show that it has broad community support, that “virtually all” funds go to direct services, and that it focuses on health and human services priorities as determined “by participation of volunteer representation from throughout the community.”⁴⁵ Essentially, these requirements amounted to saying that NOCS needed to do it the United Way way. Bill Senhauser responded energetically, citing law showing that public workplace charitable solicitation is protected by the First Amendment, and that guidelines regulating such solicitation must be content neutral. In addition, Bill Senhauser charged that the mayor's letter was a “transparent attempt to exclude Community Shares in favor of United Way,” particularly the requirement that “virtually all funds” be used to fund services as based in bias toward United Way's endowed status. The letter also boldly implied that the city policy was created by United Way, which would be illegal, and demanded to know the date by which the policy was to be enact-

ed, the people responsible for enacting the policy, and all documentation regarding the policy.⁴⁶

Other NOCS members got into the act. In June, Susan L. Vrooman wrote to Mayor Finkbeiner stating that "I would like to think that our city offices would represent ALL residents and ALL local nonprofit groups in Toledo and would show that representation in many ways, including an open workplace giving campaign."⁴⁷ The mayor responded, misaddressing his letter to Suzan L. Brooman, stating, "Contrary to your comments regarding the United Way, I believe that the United Way service area is inclusive and comprehensive." But he still allowed room to keep considering NOCS.⁴⁸

Other NOCS members were working with Peter Ujvagi, who was on the City Council at the time. He was supportive partly because of his involvement with the National Commissions on Neighborhoods and the National Committee for Responsive Philanthropy in the 1970s. He was especially sensitive to "the notion of this concept that United Way doesn't fund social change organizations and there had to be another option. I was able to put this in a national context and show that it wasn't a radical departure."⁴⁹ It was not an initially easy task, however. The misunderstanding of United Way's structure and process, as well as the continuing perception of NOCS member organizations as "controversial," got in the way. Council member Ujvagi's approach, far from disputing that characterization, used it to political advantage:

"I did a lot of arm twisting. The key to me was to get commitments from council members. First, there were some who were not supportive of social action. They saw this as potentially funding people who would make our lives uncomfortable. My pitch was we should see that as a positive thing that would help us do our jobs better. The second was institutional inertia. [They said,] "Why can't they go to United Way?" That took some educating, pointing out that with United Way the institutions they support don't change much. There were then the technical questions--how is this going to work, are we going to have the campaigns at the same time, are we going to use the same cards? We addressed them one by one. The folks advocating for this had done their homework, sharing how this was done in different cities. They'd crossed the t's and dotted the i's."⁵⁰

With council member Ujvagi on board, and the mayor backing away from his initial negative stance,⁵¹ the effort began to gain some momentum. And NOCS took at least one of the mayor's concerns to heart, with the urging of Peter Ujvagi, and began lining up support from the city unions. Mike Ferner, who had been on the City Council, took the lead in the effort:

"I felt my most useful contribution was to help get access to a couple of public

“When we went down to the city hearing, Glenn Richter promised he would not support or oppose city council’s vote on Community Shares. But then another woman from United Way gets up and testifies against us.” [Terry Glazer]

workplaces. My colleagues on the organizing committee didn't seem to have many public sector connections. We needed to approach the leaders of city unions and administrative officials who might be supportive, and I knew most of these folks. And then, as happens, we found a couple of people [from the unions] very interested in supporting us. We used those letters of support from city unions at every other place we went.”⁵²

Another part of the strategy was to try to pre-empt any resistance from the city staff over who would be responsible for running the campaign. A common concern in many workplaces is that letting in other charitable federations would require an impractical amount of additional staff time. If staff reported to the council that administration of such a campaign would be costly, it could quickly sink the effort. And, in fact, an August 1998 article in Toledo's daily newspaper, *The Blade*, had already quoted an official as saying that “there are administrative expenses in payroll deduction.”⁵³ To meet this challenge, Chuck Campbell talked with someone in the city law department. Many NOCS members met with council members to explain Community Shares and ask for support. And Mike Ferner also used his connections from his City Council days.

“I knew people in the finance department, so it was easy to get in to see them and tell them Shares was not going to be a big scary thing. The goal was for the political decision-makers to hear from their administrators that this was not going to be an administrative nightmare and neutralize that argument right off the bat.”⁵⁴

The group had first expected a vote in April 1999,⁵⁵ then in May after they had lined up support from the unions.⁵⁶ Then they learned that before the city would vote, the unions would need to sign letters of agreement.⁵⁷ Finally, at the August City Council meeting, ordinance 604-99, authorizing the city to begin a payroll deduction program for Community Shares, was brought to the floor, but quickly referred to the Finance and Budget committee.⁵⁸ That committee was set to meet on Sept. 2, and NOCS members prepped hard for the event. They also attempted to predict United Way's rebuttal, fearing first that United Way representatives would speak out against them, or would offer to collect money for NOCS if the city let them in. NOCS developed the position that, if United Way was allowed to collect the money, NOCS would not pay a fee for it, NOCS would get its own donor list that United Way would not have access to, NOCS would get its own signage, and there would be a means to preserve its identity.

The day of the hearing, which received coverage by both the Toledo daily newspaper and the *Toledo City Paper* weekly newspaper,⁵⁹ NOCS supporters filled the room and Bill Senhauser gave a carefully organized presentation addressing the usual objections to the group: that it would take money away from United Way and that it would be hard to administer. NOCS also presented testimony from a firefighters union representative,

a client from one of its member organizations, and others. And Community Shares' fears about United Way's response were partly realized. Glenn Richter, the United Way executive director, provided the standard United Way line that the special position of the United Way is justified because of its broad-based citizen participation in determining needs and prioritizing programs informed by "unbiased" volunteer citizens. He concluded, "While we support very much the Community Shares agencies, we can't help but think that this is an erosion of the special position we've had up till now." He was followed by a much less diplomatic statement from Elizabeth Rupert, introduced as a pediatrician and vice chairman of the United Way board, who told a scare story from Newark, New Jersey, that involved lawsuits and an unwieldy chaos of multiple organizations forced into that city's charitable campaign. She concluded by saying that giving access to NOCS would be "negating what has been in place in this country for over 50 years."⁶⁰ This only increased the tension between NOCS and United Way.

"I thought, how exciting that United Way is attacking us. It means we matter." [Betty Morais]

While City Council members at the hearing had many questions, only one, Betty Shultz, expressed opposition, saying that NOCS groups "are a different type of organization than those funded by the United Way. ... I just believe they're advocacy [groups] rather than charitable [ones]".⁶¹ For two other members of the City Council, however, Peter Ujvagi and Tina Wozniak, such a characterization was seen positively. Peter Ujvagi in particular characterized Community Shares member organizations as being "on the cutting edge."⁶² The committee passed the resolution and sent it onto the full council.

On September 14, NOCS again got out its supporters, and made a show of themselves:

*"When the committee passed it, we then packed the full City Council meeting. I made name tags that you slip into those plastic holders. They were screaming chartreuse green and said "Community Shares" on them. Some of our people said they were undignified, but the council people said that sitting up there and looking out at the sea of green, they were impressed. Betty Shultz said no, she wouldn't vote for it, and then she abstained, with 11 yeas. Each Community Shares member group got its own organizations and staff out. I hustled a few friends. The City Council vote was our first triumph."*⁶³

And what a triumph it was. The ordinance passed with 11 yeas, a single abstention and little discussion.⁶⁴ On Jan. 11, 2000, a city official signed a giant-sized symbolic check welcoming Community Shares to the workplace campaign.⁶⁵

NOCS' strategy was key to the campaign's success. Part of the strategy focused on gaining allies on the inside:

"The thing to do is to put a systematic plan together to show what other cities

“Once we got into the city, it was easier to get into other workplaces. That was the big one.” [Terry Glazer]

have done. To have a plan in place addressing the technical issues like when you have the campaign and how it is done. And then the issue of United Way, whether this is complementing what United Way does or competing with them. Then you need a champion on the inside. Preferably that needs to be on the policy side and the management side. The other one is follow through to make sure that once you're in you maximize it-setting targets, doing outreach. You don't do it that different from what United Way does at that point.”⁶⁶

Another part of the strategy focused on opponents:

“The goal is to at least neutralize potential adversaries, if you can't convince them to support you. Most public employee unions supported us, some were neutral, and then there was the teacher's union—a main reason why we haven't gotten into the schools.”⁶⁷

The final strategy is the lesson of perseverance, which NOCS learned for two and a half long years:

“Don't take no for an answer. We'd meet with somebody, and they're not gonna lift a finger to help you, but they may also not lift a finger to stop you. Putting people in a position where they have to [take steps to] stop you can work. To the extent you can maneuver around a formal process where it has to be like a City Council resolution, and just go to a city administrator.”⁶⁸

Gaining Access to Lucas County

Shortly after NOCS won access to the city, they also started to make a breakthrough with the county. This was a much different experience. In contrast to city government, with 12 council members and a confrontational mayor, the county had three commissioners, including Sandy Isenberg, the only woman on the county commission, and the person NOCS turned to first:

“Getting into the county employees campaign was different. Mike Ferner and I went and talked to Sandy Isenberg, and she had a million questions. We attended to the questions and went back and she had more questions. We attended to those and she said, 'OK, I'll talk to the boys.' We did go to meetings of the county commissioners and speak, but it was more informal.”⁶⁹

Like with the city, one of the biggest challenges facing NOCS was educational. Because there had never been anyone other than United Way running a charitable workplace

campaign, there was little to no knowledge about the rules governing such a campaign. But NOCS's requests quickly changed that, as one county administrator describes.

"The biggest barrier was the perception that United Way was the charitable group. We were involved with United Way for many, many years. Then Community Shares developed their concept. Under Ohio law [Revised Code, section 9.8] you may authorize a payroll deduction plan for employees. There was always the belief that there could only be one, but then after review of the law it was clear there could be more than one. The commissioners and prosecutors took a look at the code. After that, it became a matter of why not. And it was clear Community Shares had the ability."⁷⁰

NOCS representatives made their pitch to the County Commissioners on Oct. 26, 1999.⁷¹ Like with the city, there were concerns about the logistics of a charitable campaign with NOCS.

"We've taken quite a different approach. With United Way, people were willing to step up and do whatever it takes for United Way. With two groups, it was the question of do we need two sets of volunteers? So we decided to create an employee giving campaign. There was some concern about volunteerism, but we changed our focus from individual campaigns to an overall payroll deduction scheme. The other thing we had to get over was do we have the mechanical system, because it was a hand system at the time and could we handle two campaigns."⁷²

It is not clear whether United Way became involved in the discussion with the county, but they did not offer up the public opposition that occurred with the city. And the controversy that surrounded NOCS' efforts to access the city didn't exist with the county. There were, of course, concerns that NOCS could hurt United Way's receipts with the county, but that argument had been successfully countered in numerous quarters by the end of 1999.

In early January 2000, the county commissioners gave access to NOCS for a charitable workplace campaign.⁷³ So the tide has turned. This small group of stubborn activists had held out against two and a half years of rejection. They had finally established themselves as a force on the city's philanthropic scene.

"It's a chicken-egg kind of thing. We had to establish credibility and identify ourselves. We were not quite intentional about making sure we were spread across a wide area. City and county acceptance gave us credibility. If I walked into a police station today and asked how many had heard of Community

“The Stranahans have been so instrumental in starting this up. They believe in collaboration.”
[Jim Spilburg]

Shares, probably half would say yes.”⁷⁴

Now, of course, the challenge was that they had to implement their success. They were about to embark on workplace campaigns with thousands of employees, and they were still just a low-budget volunteer organization.

Building Infrastructure

In the midst of the flurry of negotiations with the city and the county in late 1999, NOCS was also involved in trying to get funds to support a staff position. As Kevin Ronnie notes, “After you've met the challenge of identifying local leaders and leadership organizations that are willing to work on development of a Community Shares, the biggest impediments to development of a Community Shares is having capital to hire a good organizer.” Steve Stranahan, in addition to helping negotiate the relationship between NOCS and United Way, also was on the board of the Stranahan Foundation, and the foundation was already familiar with a number of NOCS members.

“Betty Morais was known to us because of her superb efforts with Planned Parenthood, and talked to me about Community Shares. At that time Community Shares had 11 members. With the trustees of the Stranahan Foundation and other family members and the Needmor Foundation, we went back and looked at the members and found we were supporting 10 of the 11 of them.”⁷⁵

NOCS submitted its initial grant proposal in September 1999.⁷⁶ The foundation had a number of concerns and asked for revisions, which NOCS completed and resubmitted for \$25,000 in November.⁷⁷ The foundation approved the grant, arguing that “it was important to know the feasibility of getting Community Shares started.”⁷⁸ They also listened carefully to the concerns of the foundation that the board was not substantial enough. So they decided to place a moratorium on membership and access activities to concentrate their energies on their first city and county access campaigns coming up in the fall of 2000.⁷⁹ The Stranahan Foundation was not the only entity concerned about NOCS' capacity. An organization hoping to hold charitable workplace campaigns worth potentially hundreds of thousands of dollars with no staff capacity did not inspire confidence, as one workplace official describes:

“Community Shares didn't even have full time staff on board at the time [of negotiating access]. Originally, we were approached by representatives of Community Shares organizations. That first approach, which included political activists, gave some sense that this was an organization on a shoestring financially. When they

hired Sheila Watkins, there was a sense that these groups were making a commitment to the fundraising."⁸⁰

They quickly put the funds to use, placing an ad for a part-time campaign administrator at a \$20,000 salary in early 2000.⁸¹ They hired Sheila Watkins,⁸² who came to NOCS with, both ironically and fortuitously, a United Way background. She was, from all accounts, a very good fit for the task of moving NOCS from being an outsider organization to becoming a real player on the charitable workplace scene in Toledo.

If we hadn't gotten that money from the Stranahans we wouldn't have been able to push on." [Mike Ferner]

Northwest Ohio Community Shares in Transition

NOCS went into the 2000 campaign with the organizational base, symbolism and mission that it had relied on through the late 1990s. But it had also entered a stage of its existence that would promote changes in its self-image and presentation to the outside world. With this major transition, "Kevin Ronnie was coming to board meetings every month ... in 2000."⁸³

With the entrance of NOCS onto the public workplace charitable giving scene, NOCS members revisited the question of what organizations to recruit.

*"Discussion was held on what organizations we want to join. Do we stay with our mission statement listed on the brochure or do we take any organization with a 501(c)(3) who wants to join and is not accepted by United Way? It was decided that a letter will be sent to any organization who wants to join asking them if they are socially progressive and meet our criteria."*⁸⁴

The challenge of recruiting organizations took on new meaning when they learned that the Equal Justice Foundation was moving to Columbus, which would put NOCS under 10 members and jeopardize NOCS access to the state of Ohio campaign.⁸⁵ As 2001 approached, it also appeared that ACES could be closing its Toledo office.

The pending loss of EJF was doubly bad because it also meant the loss of the NOCS office space just as they were really going to need it. The Collingwood Arts Center quickly stepped in to temporarily fill the gap,⁸⁶ but the space didn't fit the needs of the growing organization.⁸⁷ The Lagrange Development Corp. had a house available, but NOCS couldn't afford the insurance.⁸⁸ NOCS ultimately ended up at the Planned Parenthood office for rent of \$150, the same as Planned Parenthood's membership dues.⁸⁹

The decision to move to Planned Parenthood in the spring of 2001 was somewhat controversial. Planned Parenthood has had controversy heaped on it for many years, and it impacted the perceptions of a number of NOCS members. Even those who were not

opposed to Planned Parenthood itself were concerned about being associated too closely with an organization that was often vilified and attacked. It is to everyone's credit, however, that the group stuck together through what could have been a difficult phase.

Their first campaigns also got off to a rocky start, with misunderstandings disrupting the start of the county campaign⁹⁰ and conflicts with United Way over how to manage the campaigns. The initial campaign organizing meeting with United Way was "not a success," but NOCS vowed to "try not to become public because this could become negative against us."⁹¹ They instead engaged the assistance of Steve Stranahan to help mediate the conflict, and they had a long discussion about what proportion of funds to take out of campaign receipts to pay NOCS' bills. A number of NOCS members were concerned about the 20 percent administrative cut, and how it looked compared with United Way putting 100 percent of its funds into programs (since United Way had an endowment that paid its administrative expenses). This had not been much of an issue before, since NOCS wasn't involved in any significant campaigns and didn't have to worry about how an administrative percentage looked. Ultimately, NOCS voted to continue with the 20 percent administrative cut.⁹² They were also short on volunteers to make presentations at the workplaces, with 120 speaking opportunities, but only 15 volunteers.⁹³ But all the turmoil and challenges surrounding the first campaign were worth it, as NOCS showed assets of \$34,221.00 at the end of 2000.⁹⁴

By the 2001 campaign, NOCS had found its sea legs, and also experienced a dramatic increase in the number of workplaces granting them access, including the Toledo-Lucas County Port Authority, the Lucas County Metropolitan Housing Agency, Owens Community College, the city of Sylvania, the Toledo Metropolitan Area Council of Governments, the *City Paper*, and the city of Oregon. They now had a grand total of 11,600 employees who could potentially be accessed.⁹⁵ This sudden increase in workplace access also required an increase from 30 to 70 volunteers to give NOCS presentations at those workplaces.⁹⁶ But this time 24 volunteers attended the speaker training,⁹⁷ and they filled all 105 requests for speakers.⁹⁸ The final 2001 campaign contributions were \$54,527, making NOCS the fastest growing Community Shares in the U.S.⁹⁹



This dramatic growth was taking its toll on NOCS' one part-time staff person—who was playing the roles of director, campaign manager and secretary—and on its member organizations,—who were often going well beyond their required 60 hours of volunteer time. The Stranahan Foundation came to the rescue, agreeing to provide \$15,000 additional for more hours for Sheila Watkins and a 10-hour assistant.¹⁰⁰ Operating support was becoming a priority, and NOCS ventured into the uncertain waters of do-it-yourself fundraising at the city Rib-off festival that netted \$200.¹⁰¹

As NOCS began conducting workplace campaigns, they also found themselves con-

necting with the national workplace campaign movement, joining the National Alliance for Choice in Giving.¹⁰² NACG was founded as a trade association for social justice, women's and environmental workplace funds and federations, but recently began adapting its mission toward representing other local and national workplace fundraising groups as a way to counterbalance the power of United Way.¹⁰³ NOCS also became part of a coalition of the Community Shares in Cleveland, Columbus and Cincinnati in late 2001 to work on gaining access to corporations that have a presence in all four locations.¹⁰⁴ In early 2002 they joined Community Shares USA,¹⁰⁵ a "national organization whose focus is gaining corporate access for local Community Shares organizations, like a corporation with multiple sites in various states."¹⁰⁶ They joined the Chamber of Commerce, partly to access less expensive health insurance for the director, Sheila Watkins.¹⁰⁷

There is a point in an agency where you go from that grassroots thing to a professional level. In Community Shares the change in logos marked a transition point.”
[Deb Cooper]

The professionalization of NOCS also brought with it a change in the organization's identity, reflected in its logo and mission statement. The old logo was symbolic of Community Shares in many ways—searching for its place in the Toledo giving scene, as well as providing a beacon for others. The new logo, much less explicitly symbolic and more profes-

<p>2000 Mission Statement: We strive to address the root causes of social problems by providing effective programs and services to those in need.</p>	<p>2002 Mission Statement: Northwest Ohio Community Shares is a partnership of social, economic and environmental justice organizations that collaborate to build a better community by increasing public awareness of our member agencies' work and providing funds through workplace giving.</p>
	

sionalized, was more indicative of an organization that believed it had found its place. The change in mission statements, however, seemed to reflect more the growing diversity of organizations within NOCS, particularly the most recently recruited groups.

Recruiting Organizations

The need to shore up NOCS' organizational base, provide more volunteers for the work and spread its influence saw NOCS' recruitment efforts move into high gear in 2001. Spurring their efforts was the potential loss of FOCUS, which was expecting membership in United Way.¹⁰⁸ FOCUS was invited back to NOCS when those expectations turned out to be false,¹⁰⁹ but there was still the impending loss of EJP and ACES to deal with. At the time of these early-2001 recruitment efforts, NOCS was still not in a position to promise big returns to groups, so they took a different tack:

"The next big batch who came on board, around the time of Nature's Nursery, we sold visibility over dollars. We sold Deb Cooper on people knowing about Nature's Nursery. I grew up here, and there were groups in the city doing incredible work and I'd never heard of them. My pledge card is about 10 agencies, and most of them are groups I never heard of until I joined Community Shares."¹¹⁰

The strategy succeeded in recruiting a small number of groups who responded to the visibility pitch. And, interestingly, among the things that NOCS had to overcome, in addition to its status as an outsider, was guilt by association because it employed the same fundraising strategy as United Way.

"We joined in April 2001. We have a very small board. There were five or six of us when we first mentioned it. Betty Morais and Sheila Watkins came out to talk to us. I was probably the holdout. I was not a huge fan of workplace giving, having had bad experiences with it as an employee. But the board wanted it and designated me to go to the meetings, which I thought was a big mistake. We got over \$3,000 in the first campaign, making it a fairly painless fundraiser. We don't have the human resources to do massive fundraising. There was some doubt among the board as to whether Community Shares could make a go of it. I was the one who, after a year, said let's continue. The other valued component is that Community Shares brings exposure. We're not well publicized in Toledo. One of the ways to get that exposure is through the campaign talks. The more of those you do, the more money you will get."¹¹¹

"I did not seek out Community Shares. I got a call from Deb Cooper, whose organization is similar to ours in that it deals with animals. It was about two years ago. She said she was in charge of membership and wanted to inform me about Community Shares. She said when she got involved it was primarily for the public relations aspect. We at Vail Meadows were looking for a way to educate the community. We're basically out in the middle of nowhere, and we wanted to get

our name out there. She sent a packet, and it looked fine. I had several questions as I was filling out the packet. She was thorough in her answers. I went to the board, saying there was a cost involved, but my goal was to talk about us. The board said if I could get the hours covered it was OK."¹¹²

For others, the presence of an alternative to United Way was an attraction that overcame the skepticism of NOCS as a new group without a long track record.

*"As a new member I spent the first six months saying, 'what is this group about?' And I wasn't sure I liked it. They approached me about membership. I'd never heard of the group. I didn't know what it was about. But I thought maybe the group had ambitions. I'm very concerned about our reputation. Putting my name with Community Shares, I have to feel very comfortable with it. I got the literature, read it. I talked to Deb Cooper, and talked to my development committee. They said "let's go with it." It was very naïve how we went into it. We had been with the United Way ..., and had been getting greatly reduced funding. I was somewhat frustrated by that. We [NOCS] are agency driven when, in United Way, agencies have very little input on how their funding is decided. I never thought they who made decisions about the money knew anything about us peons."*¹¹³

By the middle of 2001, NOCS had increased to 14 members,¹¹⁴ and by the time of the 2002 campaign, membership had increased to 23. One of the unique characteristics of the NOCS membership was the recruitment of a number of organizations that worked with animals, or utilized animals as a core component of their work with people. These include a wildlife rehabilitation organization, an assistance dogs training organization, an organization using horses as part of a rehabilitation program for riders with disabilities, and an area humane society. Such organizations have done surprisingly well in the workplace campaigns, leading to a friendly rivalry between the "animal groups" and some of the other organizations.

But with 23 groups, NOCS could not sit idly by and hope its existing workplaces would provide adequate funds. There was growing concern that the pie would be spread too thin. So they continued pushing for workplace access, especially because they still had not achieved access to some of the largest public employers in the area.

Getting Access to the University of Toledo

The University of Toledo was one of the city's biggest prizes for workplace giving. It should have been relatively easy--a large public institution with a lot of faculty who did not support United Way and were looking for an alternative. The director of the University's

“For three years we worked on UT, and not very happily. We'd never get callbacks. They were very difficult. BG was another one. We only worked on them for two years. These massive bureaucracies, you never have a feel for what's happening and the person you're talking to doesn't have any power.” [Betty Morais]

Urban Affairs Center was on the NOCS advisory board. But like with the other workplaces, they found inertia to be one of the strongest barriers. In 1998, they could not even get a meeting with the university president to discuss the question. So they approached Dave Lindsley, who was associate vice president for Academic Affairs. Dave Lindsley was a member of the First Unitarian Universalist Church of Toledo, whose minister was Wendy Jerome Stern, one of the NOCS founders. Terry Glazer, who had been involved with NOCS from the early days as well, was also a member of the church. They found Dave Lindsley to be very supportive “because it was affiliated with organizations that United Way would not support, and I thought they were legitimate organizations.”¹¹⁵ Dave Lindsley got the support of the vice president for Academic Affairs, and they jointly approached Frank Horton, the university president. But they also got nowhere, as Frank Horton “saw that we were so closely affiliated with United Way and feared another group would have a negative impact on United Way.”¹¹⁶ What he lacked was the Community Shares data sheet showing that the reverse impact was more likely. In addition, like with the other employers, there was a concern that it would be difficult to find volunteers to run the campaign. And again, Dave Lindsley did not have evidence to quell that concern.

The University of Toledo was in turmoil at the time. The faculty had recently unionized, and the university president did not react well to a union forming on his watch. Most of his time and attention was taken up in a struggle for control of the institution. When the president left, he was replaced by a dean from the engineering college, Vik Kapoor, who began making dramatic and controversial changes across the university, including the replacement of the Urban Affairs Center director, NOCS' main contact to the university. Even the faculty was distracted by the conflict, refusing to consider helping NOCS gain access.¹¹⁷ They fared little better with the head of the faculty union or the chair of the university board of trustees,¹¹⁸ who saw themselves as locked in mortal combat. As Wendy Jerome Stern left Toledo for a position in Minneapolis in 1999, she wrote a letter to the NOCS board, which began, “The last thing I am doing before leaving Toledo. I am telling you to make waves.” The letter reports on a meeting with President Kapoor where he said that if University of Toledo employees want to have Community Shares, they should tell him.¹¹⁹ So NOCS organized a petition drive with the university employees.¹²⁰ They did so this time without the inside support of Dave Lindsley, who had been among the wave of retirements that plagued the university as a result of the Kapoor presidency.

The Kapoor presidency did not last long enough for the petition to matter, as faculty opposition and the publicly apparent disruption of the university drove him from office after only a year and a half. Terry Glazer and Sheila Watkins again approached Dave Lindsley, who had returned from retirement to help rebuild the university, and asked him to help them lobby the interim president, Bill Decatur. This time Dave Lindsley was armed with the Community Shares data sheet citing research in 227 workplace campaigns that included both United Way and other workplace funds and federations showing that United Way receipts increased in 75 percent of the campaigns, and increased

as much or more than in the average United Way campaign.¹²¹ Once again, however, NOCS' timing was beset by bad luck.

I did another memo to Bill, using information provided by Sheila Watkins in the spring of 2001. It was during the search process for the new president. Bill Decatur was very supportive of Community Shares after I explained it to him. I kept trying to get him to bring it to the executive staff, but he didn't feel as though he could commit an incoming president to a major policy position on workplace giving. It was pretty clear we were going to have a new president for the summer. We dropped it at that point."¹²²

So, another year, another president at the University of Toledo, and another attempt by NOCS to access its employees for charitable giving. Dave Lindsley approached the new president, Dan Johnson, who finally agreed to consider the question. The result was a university subcommittee including Dave Lindsley, the interim vice president for Institutional Advancement, and Sally Perz, a former Republican state representative appointed by Kapoor, who was also on the board of United Way.¹²³ Sally Perz's involvement is characterized a number of different ways, but it was clear that she had the most concerns about opening the university to other charitable campaigns. Reports were that she was also getting pressure from United Way.

As negotiations continued, other groups also began requesting access, most notably Earth Shares of Ohio and Community Health Charities of Ohio.

*"It came down to whether we could find a way to get together. Other groups found out about it then, and they also applied for access. We prepared a series of questions for all of them, and they responded."*¹²⁴

*"They asked questions, we answered. They asked more questions, we answered. For about a year."*¹²⁵

One of those sets of questions ended up going to the wrong address, further complicating what was already a frustrating experience.¹²⁶

By this time, Vern Snyder had taken over as the permanent vice president for Institutional Advancement, and helped lead the group to a position.

"Vern Snyder took over. . . , and he was supportive. He bought the concept of Community Shares increasing giving, which was not generally accepted. We had very interesting meetings with each of the groups. We had a long series of drafts and worked on what we were going to accept. Vern Snyder guided the

group in the direction of the more, the merrier. One condition was that an organization had to provide direct benefit to Northwest Ohio. That has been interpreted very loosely and has ended up being defined as having a presence in NW Ohio. We came to the position that, as a metropolitan university, as a community partner, our goal was to help and support Northwest Ohio. Dan Johnson was very supportive of this."¹²⁷

The final step was to overcome United Way's opposition, which, while not intransigent, still required continual discussion and negotiation.

"Then there was a lot of negotiating with United Way. ... Sally kept raising issues but it wasn't like she was stonewalling. Ultimately, we told United Way, 'You will either find a way to work with these other groups, or we won't let you in.' ... I don't think United Way saw any benefit to them. They saw this as exacerbating a problem that already existed. In all of my appeals I never said anything negative about United Way, and presented it as increasing total giving. Ever since I made the first presentation."¹²⁸

Finally, in 2003, Community Shares would conduct its first workplace giving campaign with the University of Toledo. In the interim they had also gotten access to Bowling Green State University, 45 minutes down the road. It was an extraordinarily frustrating experience for Community Shares, and it certainly speaks to the commitment and steadfastness of the group.

Managing Momentum and Complexity

Growth continued in NOCS in 2002 at an exponential pace, and the group was receiving national recognition. Sheila Watkins became vice president for Community Shares USA. NOCS received \$53,000 from the Stranahan Foundation to make Sheila Watkins' position full-time, and to support a part-time administrative assistant.¹²⁹ However, NOCS also was informed that the foundation was going to begin decreasing support and expected NOCS to find a more sustainable means of providing operating support.¹³⁰

This struggle for operating support has become one of the greatest challenges facing Community Shares. Members tried a number of fundraisers, but with little experience in doing such things, a successful formula still has not been found. They started organizing a raffle in 2002, but because of a concern about the raffle's legality, they did not continue, even after printing \$600 in tickets.¹³¹ They also began trying to beef up the involvement of their advisory board, and recruiting higher status advisory board members, but NOCS members' lack of connections made the process difficult.¹³² They fared no better approaching other foundations, as their proposal to the Toledo Community Foundation for operating support was also denied.¹³³

The need for operating support was paramount. In the 2002 campaign NOCS surpassed its campaign of \$110,000, and fell just shy of its employee goal of \$25,000.¹³⁴ NOCS members also gave 190 workplace presentations in 2002 to achieve those goals.¹³⁵ In early 2003, both Planned Parenthood and NOCS were running out of room and started searching for office space.¹³⁶ Again one of their members came through when Neighborhoods in Partnership (NIP) offered them space in their office building. Things were getting much more complicated.

While NOCS continued to increase the number of workplaces it was accessing, it was still meeting opposition in some quarters. The Toledo Teachers Union was still opposing NOCS access to its membership, thus also preventing access to the Toledo public school system. The board began considering legal action to get into the Medical College of Ohio,¹³⁷ but eventually the Medical College of Ohio allowed access. The real challenge was going to be getting into the private sector, where the law did not require equal access and where United Way's hold was still strong. Unions could help in some places, but "We have not been able to get a foothold with the unions. We don't have any ins. The leaders of the UAW are on the United Way board."¹³⁸ NOCS engaged the help of Thomas Chema, an important business figure in Cleveland who was involved in the construction of the downtown Toledo minor league baseball stadium, in an attempt to gain access to a local subsidiary of a Cleveland corporation friendly to Cleveland Community Shares. But the Toledo subsidiary remained closed.¹³⁹ The same conditions prevailed in other major private employers, even if they were not actually opposed to Community Shares:

*"The biggest challenge is the only way we're gonna grow is moving into the private sector. Rudolph-Libbe, for example. I know one of the partners there. We thought they'd be easy because we know them. I haven't necessarily approached him because if he ticks off United Way by letting Community Shares in, it's gonna affect his business."*¹⁴⁰

The partnership established by the Ohio Community Shares, and funded by the Changemakers Foundation, is still attempting "to access corporations having facilities in more than one city, like Turner Construction and Huntington Bank, who have allowed access in other Ohio cities, but not in Toledo."¹⁴¹

The workplace campaigns also took on new levels of complication, requiring constant vigilance. In the case of the Bowling Green State University campaign, Sheila Watkins was informed that the university wanted three agencies removed from the campaign (all related to animals), saying they were only a health and human services campaign. NOCS called an executive committee meeting on very short notice, and outlined a letter of response, and a public relations and advocacy campaign. "Under no circumstances were we going to allow anyone to fracture these agencies to the point where we

**"In Toledo, the United Way leadership is pretty intertwined with other organizations. Those traditional forces in United Way were heavy in public institutions."
[Jerry Ceille]**

“I serve on a United Way Agency and I see us as far more oriented to social justice and social action than United Way. “
[Chuck Campbell]

decided we were going to pull out of the campaign if it came to that.” But NOCS quickly got a new message from the university saying the policy was going to be changed before they even got a chance to take action.¹⁴² As a consequence, however, NOCS did make a change to their bylaws, informally referred to as the “three musketeers clause,” that they would not allow agencies to be split off of campaigns simply at the will of the employer.¹⁴³ In another campaign challenge with the Sylvania public schools, NOCS learned from one of its members' spouses, who was a Sylvania school teacher, that apparently only United Way pledge cards were sent out to teachers. NOCS then e-mailed all of the teachers, shortly after which the NOCS pledge cards were put out.¹⁴⁴

The challenges with United Way also grew more complicated as workplace campaigns went digital. United Way began pushing to be the campaign manager for combined campaigns in which it would use scanable pledge forms and e-pledges that would require the cash-strapped NOCS to pay for their share of pledge forms, scan fees, design and printing, bank account charges plus a 4 percent administrative fee.¹⁴⁵ Such a process is infinitely more efficient, but only if you have more money than volunteers, and NOCS actually had more volunteers than money. United Way's continuing strategies also made clear that respect had yet to be gained. The county campaign meeting was at the United Way building, not county offices, and was run by a United Way official, not a county official. United Way wanted NOCS to stuff all of its things inside a United Way bag, to which NOCS refused. United Way staff attempted to write the description of NOCS for the Bowling Green State University workplace campaign Web page. For the joint campaigns that United Way managed, communication with NOCS regarding presentations was fraught with errors and last-minute announcements.¹⁴⁶ Reports of receipts from workplace campaigns lacked important detail, which NOCS had expected would be provided but had not explicitly demanded. As one NOCS member commented, “It's a learning curve.”¹⁴⁷

There were also numerous internal issues with which to deal. Now that NOCS was managing a six-figure campaign total with more than 20,000 potential donors, money management took on a new urgency. The importance of money management led to NOCS voting in a new treasurer in 2002, obtaining new fiscal management software and changing how it handled payroll, IRS reporting, and other related things. The finance committee, including an accountant from one of the member organizations, also took on the responsibility of budgeting. There was turnover of other officers in 2002, as the officer positions took on a new sense of importance. The officers began meeting monthly as an executive committee.¹⁴⁸ The sudden growth in NOCS also led to a renewed discussion of how many members to have, and provided one of the few examples of split votes among the group, as attempts to limit membership to the current level were voted down 4-15 and 6-13, ultimately passing a limit of 30 after two years.¹⁴⁹ And the dissolution of one of the original member organizations, Samaritan Counseling Center,¹⁵⁰ led to a need for a policy of what to do for the campaign donations earmarked for them, leading to a bylaws amendment in

2003. NOCS also attempted to better focus their media and public relations activities with a new committee¹⁵¹ but continued to feel their way along. They had connected with a class at Bowling Green State University to create a marketing plan for the organization, but the process experienced many delays.¹⁵²

In 2003, the sour economy also started to catch up with NOCS, and their growth began to slow down. They had set ambitious goals for 2003 of a budget of \$225,000, 40,000 employees, 10 new public institutions, two major private employers (each with more than 500 employees), and raising 15 percent of their operating costs.¹⁵³ But at the end of 2003, overall campaign donations were not matching those goals.

Seven years in, it continues to be "eking things out one by one."¹⁵⁴ But there is no sense of discouragement. There is a sense among the group of being in it for the long haul, and a continuing tenacity and quality of relationship among the members that will sustain them.

Creative Tensions

All efforts to change the status quo, no matter how reasonable or logical or kind, create friction and tension. That tension is not necessarily bad. It is the sense of unease created by the distance between what is and what should be that motivates innovation and commitment to change. But such tension, regardless of how productive it is, often is perceived as bad. And that perception transforms otherwise productive tensions into destructive conflicts, destroying organizations and their efforts to make change. In efforts like NOCS, which not only survive, but also seem to thrive on the tension, it is possible to see the creative products—in the way NOCS distributes undesignated funds, in the way it recruits member organizations, and in the way it perseveres in gaining access to workplaces.

This section of the paper will explore some of the current creative tensions in NOCS and their possible productive consequences. And because the importance of those tensions lies in members' perceptions of them, this section will also rely on people's own words as much as possible.

Acting Politically

The very presence of organizations such as NOCS upset the balance of power in local philanthropy. When that happened, those who were used to having power fought to keep it. That is what has happened with United Way and its supporters. The conflict between United Way and NOCS is worsened by their different approaches to making decisions. United Way's decision-making is controlled by a relatively elite group that is

also relatively isolated from the social problems that member organizations attempt to treat. Community Shares decisions are made by the member organizations themselves, who then encourage donors to also make their own decisions in designating where their money goes.

But what does one do about the conflict? Here is where the creative tension comes in. There is continuous discussion in NOCS over how to respond to United Way's tactics. There is very little appetite for coming out and attacking United Way directly, and much concern about the consequences of NOCS confronting United Way about its former and current misdeeds.

"I am no lover of the United Way. Six years ago if you'd even mentioned United Way, my face would go red. We need to recognize United Way and recognize what they do, but we need to stop pointing the finger their way. It may be that the founding members may have a tougher time letting go of the bad things happening there. We can't come across as against United Way because we could be seen as against their charities."¹⁵⁵

Some Community Shares members believe that United Way is digging its own grave, partly because its reputation has already been tarnished in the community by scandals at the local and national level, and by a lack of good public relations at the local level.

"I'm not quite as paranoid about United Way as some. United Way certainly has lost credibility in the community. My wife now has the option to give to Community Shares, and she does."¹⁵⁶

"United Way had done a lot of damage to themselves. Especially donors seem to appreciate having more choices. United Way saw us making headway and tried to put a squish on it. United Way has certainly had a lot of big wheelers involved that dealing with that is certainly a challenge. Sheila Watkins and Deb Cooper and Chuck Campbell see it more, and that's why I try to calm them down. Our strategy is not to react to what United Way is doing. By sticking with our agenda, we're going to step into the vacuum they have allowed. The meetings Sheila Watkins's been having with Steve Stranahan are really going to help us. And that's real credibility to be part of that. I went to a [University of Toledo] speaking engagement, and the person there was really plugging United Way. It's gonna take time for attitudes to change. The speaker said he didn't find out until August that it is no longer the United Way campaign. I found out that one of my

donors who works at MCO saw on her pay stub that it was titled as the United

Way campaign and she called me to make sure we got her pledge. It's just gonna take time."¹⁵⁷

The strategy of not reacting to United Way publicly, however, does not mean that NOCS does not react privately, and some NOCS members are concerned that the private strategy and public strategy may not be as separate as some might think.

"I have a concern that our internal identity seems to be against United Way. I'm not against United Way. I give money to United Way. If that's our internal identity, it becomes an external identity too. It has to show eventually. It was raised by one of my board members who went to speaker training and said, "All I heard about was 'here's what United Way does', not what you do." When I explain what Community Shares is, I say it's like United Way."¹⁵⁸

The creative resolution of this tension, however, has come in the way that NOCS has treated its relationship with United Way as a chess game, attempting to figure out what strategic move United Way will make next, and coming up with the best counter move.

"The United Way now knows they have to let others into public sector campaigns. So they try to contain the damage by offering to manage those campaigns, thus limiting others' visibility and contact with employees. Sheila Watkins and the board were very smart in pushing for campaigns where the United Way has a more limited role. In this, Sheila's experience in campaign management was a huge asset."¹⁵⁹

The tension over whether and how to react to United Way is just one manifestation of a broader issue, which is how to react to the resistance that any social change effort is bound to arouse. And here the choice often separates into confrontation versus cooperation. In gaining access to public sector workplaces, NOCS has often employed a "good cop-bad cop" strategy where NOCS members particularly good at confrontation will threaten litigation, or otherwise confront the employer to get their attention, and other NOCS members particularly good at cooperative negotiation will then step in through the doors that confrontation opens.

"Being a litigator, taking them to court was like no big deal. To others, that could really sour a relationship. Having the chutzpah to file is important. I would be sitting there looking at them [the target] in the eye, and they knew I would file it tomorrow. People knew about EJF and our reputation in the community. They knew we were suing all kinds of people for all kinds of things."¹⁶⁰

"[Bill Senhauser] sent a letter to UT threatening a lawsuit, and people got upset.

You get more flies with honey than vinegar they say. I say, who needs flies."¹⁶¹

While more confrontational tactics are very effective in opening doors, they can also create antagonisms that can make negotiation difficult. Consequently, using just the correct level of confrontation is crucial, as is having an effective counterbalancing strategy of cooperation:

"The crucial political challenges were getting public sector employers to let them in. They had to figure out how to get to key decision-makers. Now there are three basic strategies for accessing public employers: an internal champion, organizing employees, or using a legal strategy. Sometimes the only way to do this is to use the set of rights available with public sector employers: to imply that a lawsuit may be forthcoming, to openly threaten a lawsuit or to actually file a suit. They have to let you in, but they can write criteria that make it disadvantageous for justice groups or other groups. Taking legal action is tricky. Threatening a legal challenge can get you access, but can endanger other relationships. Sheila Watkins has had to keep the legal option in front of them [NOCS board]." ¹⁶²

*"I was successful at United Way because I listened to the employer. My whole thing is managing the employer's campaign from the employer's perspective. It is a less arrogant attitude. It takes a lot of meetings to understand the workplace culture of each employer so you can manage a campaign effectively. That's a learning curve for us."*¹⁶³

There is also a split within NOCS between groups that are seen as politically controversial or confrontational, and those that avoid political involvement. It can be pretty easy for an adversary to exploit such diversity within an organization. But NOCS members recognize the potential for such a split, and work hard to prevent it.

*"We've got some members of CS people who don't win a lot of prizes. I understand that, because we [Planned Parenthood] get beat up every day. We probably hurt them in many ways. The ACLU is the other one. That is why we have to go under the banner of Community Shares."*¹⁶⁴

When Planned Parenthood offered space for NOCS after the EJF left, there was a lot of discussion over whether to accept, and some opposition. But they did accept, and no one left the group even when it would have been easy to, since the workplace campaigns were not powerful yet. And the "three musketeers clause," which prevents NOCS from limiting any organization's involvement in a workplace campaign just to satisfy the whim of an employer, passed without opposition in December 2003.¹⁶⁵ It is to every-

one's credit that, with so much political diversity on the board, they stick together.

"Our philosophy is that even if you don't agree with an agency's mission you have to respect them. And be willing to be included with them as members agencies of Community Shares."¹⁶⁶

Social Service and Social Action

A related set of political tensions has to do with NOCS' historical mission of supporting social change organizations, and the increasing number of service-oriented organizations that are becoming members. NOCS was never strident about supporting social change groups, and in one early case Toledoans United for Social Action decided not to join because its own direct social action-oriented fundraising style did not fit the NOCS workplace fundraising model.¹⁶⁷ And one of the earliest members was the Collingwood Arts Center, which was not a social action organization. There is also a belief among several NOCS members that a greater diversity of groups will provide for a greater diversity of donors. It may, in fact, be impractical for an organization like NOCS to exclusively serve social change organizations:

"Most Community Shares, when they start, want more of a social change focus, but usually there are not enough of those groups to create and sustain a critical mass. Moreover, the fundraising appeal of a Community Shares that is focused on primarily hard-edged social justice advocacy charities is limited, and will only work in metro areas which have a large population of progressive/liberal people that are interested in supporting those types of charities and causes. So to create a federation that has a sustainable critical mass and a broader fundraising appeal, you create a broader coalition by allowing groups to define themselves within a broad definition of social justice—the ultimate test being are they willing to be seen in public with the other groups in the coalition; are they willing to be seen in partnership with abortion advocates, gays and lesbians, civil rights activists and so on."¹⁶⁸

The increasing diversity of membership has become reflected in the changing mission statements of NOCS, presented earlier. The early mission statement was more explicitly political and focused. But as NOCS membership became increasingly diverse, the mission statement also reflected that diversity. It did not, however, give up the social justice angle.

So the tension between social service and social action remains in the background, occasionally erupting into a full-fledged discussion, as it did during the NOCS annual retreat in 2004. Upon reading this report, members began asking whether social justice

"We were really looking to come up with a list of organizations that people would want to contribute to. The longer the list of groups, and the more people see something they want to give to, the more they would give." [Bill Senhauser]

“We found it interesting that Northwest Ohio Community Shares is also a community-based organization, and their mission is similar to ours in serving the immediate needs of the community. “
[Jim Diegel]

was still central to NOCS, or whether the mix of groups had moved it away from that mission. It is important to note, however, that NOCS has approximately the same proportion of groups that do not easily fit the social justice mission (about one-third) as when the organization was founded. The question was not answered at the retreat, and it is unlikely to be answered any time soon.¹⁶⁹

This tension also remains on people's minds in a number of ways. As Kevin Ronnie of NCRP commented at the NOCS 2003 board retreat: Community Shares is a member-owned cooperative. As such, it promotes a certain amount of social action simply because of its existence, provides both choice for donors and opportunities for charities to network with each other, promotes progressive activism as a legitimate role, and promotes progressive philanthropy as an important goal.¹⁷⁰ Social action is an inescapable fact of life for such an organization. And thinking about that lingers within the organization—some of it spurred on by this research, as some member groups were unaware of Community Shares' historical social change focus.

For some, the social change focus is the most important part of NOCS:

“I liked that theme of social justice. We can't have every nonprofit become part of Community Shares. I thought it should have stayed as social justice. I wanted to stop any more groups from coming in at that point. I think we could have been more selective.”¹⁷¹

That social change focus is also not narrowly defined, including arts and education activities for a number of the members:

“I sometimes have to think how we fit in Community Shares' definition. When I look at social change, I think we have to include the environment. We go out and talk to schools, civic groups. We offer in-services to the police, hospitals, etc. If you ask me what the most important thing is we do, that's it. We tell ourselves that every phone call is an opportunity to educate.”¹⁷²

“I was unaware that Community Shares had a social change mission [historically]. Our mission for the clients is to enhance their life and work on the normalities rather than the abnormalities. That takes about 60 percent of our efforts. Social change comes from the fact that we present our riders to the community, to volunteers, etc., as citizens. If you get to know them, you will get past your first impressions. We encourage the leaders and sidewalkers to get to know them on another level.”¹⁷³

“When we went after animal groups, we went for rehab and animal therapy.

Are they making social change? If you look not at our mission statement but our minutes, you will see us say arts are a social change focus in our community. The Collingwood Arts Center came on when nobody else would come on."¹⁷⁴

There are also some NOCS members who see the organization as primarily a more open version of the United Way, and do not see a fit with at least a narrow social change definition:

"Our organization is not in that kind of circle. So if this group was formed to bring more awareness to those kind of issues, I don't see it. To me, Community Shares is not a specific group of nonprofits, but just those who couldn't get funding for one reason or another. The original agencies were along that focus, and I don't see their focus still there. That's one of the reasons I have to look at the mission statement. That could just be because my agency doesn't fit."¹⁷⁵

For almost everyone, however, the discussion remains open, and there is interest in how to best balance the mix of groups that constitute Community Shares:

"We visited Madison, Wisconsin recently. While there, I read an editorial in the Capitol-Times regarding their local Community Shares. They collected \$720,000 during their past campaign. One fact that I drew from the article is that they were focused on environmental and social issues. Relating this to NOCS, it seems we are not as focused. We have a variety of groups that address issues beyond what would be considered social or environmental concerns. We are now talking about approaching organizations like the Toledo Ballet. Is this the kind of organization we want? Does the inclusion of Planned Parenthood and the ACLU hurt us in any way? Could it be that linkages with CDCs and other social changes agencies make more sense? Nature's Nursery is one of Community Shares most successful agencies. Does that affect the perception of Community Shares' mission in the community? Are we blurring the meaning of "community" with our entry into Wood County? Perhaps the next retreat should go beyond discussions of future campaign strategies and, rather, think critically as to who we want our membership to be. Is the breadth of our group helping or hurting us? Are potential donors going to be confused?"¹⁷⁶

While these questions are meant to be rhetorical, they demonstrate the extent to which member agencies agonize over composition of the organization. The concerns about who and how many to let in are also felt throughout the organization, bas with nearly all Community Shares across the country, diversity in NOCS seems to create rather than decrease the energy level in the organization.¹⁷⁷ And the emphasis on diversity is seen as practical by local funders as well.¹⁷⁸ Even the strongest supporters of the social change

I like having some minimum. It does force members to be involved and there are consequences for not being involved. Usually you have 20 percent of the volunteers doing 80 percent of the work. [Chris Diefenthaler]

It certainly addresses the issue of people who just come and warm a seat. [Jim Spilburg]

emphasis attribute great value to the opportunities to work with organizations that are not like theirs.

Participation, Commitment, and Self-Interest Among Diverse Organizations

Because NOCS is structured as a cooperative, it also relies on its members for much of the labor required to make workplace fundraising a success, including giving presentations at workplace campaign kickoffs, meeting with prospective employers, recruiting new NOCS members, organizing operational support fundraisers and writing grant proposals. To manage all that labor, NOCS requires each member to put in at least 60 hours annually in order to be eligible for receiving undesignated funds. Everyone supports the requirement, and in some cases, people would even like to see more hours contributed, though they realize that may be unrealistic. Attendance at monthly board meetings and committee meetings can make up as much as two-thirds of those 60 hours. For some, that leaves too few hours for the work required to make the organization run. Executive committee members regularly surpass 100 hours, and in some cases surpass 200 hours annually.

It is not easy for every organization to make the 60-hour requirement. The story of the Fund for Migrant Worker Justice is particularly instructive:

"When I came here, Mike Ferner was here. He carried Community Shares. I came here at the end of '97. I did some of the paperwork on that for the state and federal campaigns. When Mike left, it went over to Steve. He didn't like it, and I picked up more of the paperwork. Baldemar was called to give some of the talks, after we got into the city. Morgan came in after Steve. We had to really sit on him to go to the meetings. When he left, I had to pick it up. Community Shares got tied to the [FLOC] communications position because of Mike's work with it in the very beginning. You might say it should be in fundraising, but in FLOC we are all expected to do fundraising. I tried to bring some other people on board here, but that hasn't flourished. I'm trying to find a volunteer with FLOC to take it over."¹⁷⁹

In addition, because FLOC serves Latino migrant farmworkers, many of its participants do not speak English as a first language, making its pool of potential participants even smaller. But most importantly, staff turnover interrupts the continuity of an organization's participation in NOCS. In FLOC, the volunteer hours are also designated for a lower level staff position, and such positions are often caught between demands from the director to serve the organization itself, and demands from NOCS for volunteer hours. Other organizations that rely on their own board members to put in the 60 hours also face challenges because it requires those board members to increase their own volunteer hours commitment.

And that participation can be complex—that is, understanding the importance of the 60-hour requirement and its connection to undesignated funds. Consequently, participation is somewhat unequal in the organization, and there are several organizations that don't make their 60 hours each year.

"I don't have a problem with the 60 hours. We're such a big agency here. I'm over already. There are a couple of agencies though, it's hard for a two-man operation to give 60 hours. There's no continuity sometimes because people quit and leave, and the new people don't know anything about it. If you get bigger, maybe you don't need everybody to give 60 hours. Now you've got maybe 10 or 12 programs that can give the time and money. And I don't think you should expect the small organizations to do as much as the big ones, but you don't want the big ones to run it either."¹⁸⁰

The 60-hour requirement has also been a bit intimidating for some potential recruits:

"When NOCS formed, we sent out hundreds of letters to nonprofits for interest in membership. One thing that seems to scare groups the most is the 60 hours. We now include board meetings in the 60 hours. We had an agency leave because they couldn't make the 60 hours. A lot of agencies have part-time help. Only a few of our agencies have more than five employees. The agencies who don't make the 60 hours have not complained about not getting any undesignated funds."¹⁸¹

"Sixty hours is ridiculously easy to get. When we joined, one of my concerns was the 60 hours. But I've since realized how easy it is. Whether we should up it, I don't know. It seems to be the scariest thing about Community Shares out there. When I talk to people about membership, 60 hours is the biggest question we get asked. The \$200 fee and 20 percent admin cut isn't an issue. But the 60 hours freaks them out. A couple agencies expressed concern about the fee, but not many. I'm used to tracking volunteer hours here. If you're not doing this, then 60 may seem like a lot."¹⁸²

A new situation developed during the 2003 campaign season where workplaces requested far fewer presentations than they had in past years. A number of organizations were faced with not making the 60-hour requirement, prompting the executive committee to recommend cutting the hours requirement for 2003.¹⁸³ Interestingly, as the concerns about the lack of speaking engagements were being expressed to me, they were also quietly being expressed throughout the organization outside of regular meetings, showing the depth of communication in NOCS.

"The 60 hours does not bother me. [But] If you don't bring a skill to the table, getting that 60 hours can be difficult." [Jim Spilburg]

"I see this as a miracle. They have full time jobs, homes, families, lives and many of them are from small agencies with few resources. Like every other board, most fulfill their obligation and some don't. I think the 60-hour requirement is low because you can count committee meetings and board meetings. I haven't heard anyone complain about it." [Betty Morais]

Part of the challenge of meeting the 60-hour requirement is developing a volunteer task structure that provided a greater variety of opportunities for people to participate. There are some structured opportunities already, particularly for those with financial management skills, but others are not quite so officially organized. A number of organization representatives do provide specific services, including one member that provides graphics services for NOCS. But there is not an institutionalized process for designating organizational needs and matching those with member skills. Whether doing so would be beneficial is uncertain, since relying too much on voluntary labor to fulfill essential organizational tasks can be risky. Other organizations find less specific, but important, ways of putting in their volunteer hours:

"Community Shares is generous in how they allow those 60 hours to be met. Whenever I get to talk, even if it is not directly related to Community Shares, I make it about Community Shares. When I go to health talks, my Community Shares info is right there. I hand out Community Shares literature. It's a way to get Community Shares recognized. They're my opportunity to educate the community on Vail Meadows, and I'm their opportunity to educate the community on NOCS. I'm not talking that the 60 hours should be more, but maybe it should be more specific. If Sheila Watkins comes to our annual fundraiser, I get her six hours. Maybe there should be X number of hours where every agency has to do something specific."¹⁸⁴

While there is universal support for the 60-hour requirement, there is also recognition among NOCS members that they face a related tension between their organization's immediate self-interest and the long-term interest of NOCS. This problem of self versus group interest is common to any collective endeavor, but has specific characteristics in NOCS that members have been well aware of since the earliest days of the group. They realized in 1998 that in Greater Cleveland Community Shares, after 13 years, most groups get \$3,000 to 5,000 per year.¹⁸⁵ And everyone had to consider whether the time invested in NOCS would serve their own organization in the long run.

"I really had no business going to those meetings looking strictly at a "return" on my time invested. If Community Shares ever succeeded, it was going to be years down the road. I was the FLOC development and communications person, and my job was to raise money for the union. It was a fair amount of time that in a way I felt was taking me away from the immediate needs of my job. I was rationalizing that this will pay off some day. It just seemed like an incredible long shot. And based on the time invested there wasn't much return."¹⁸⁶

In the end they stuck with it, and the current organizations continue to stick with it. And they continue to be aware that there is a tension. And the tension is not just about con-

tributing time to NOCS. It is also about the fundraising process itself:

"It's a hard sell to ask a board [of your own agency] to contribute to Community Shares when there's 20 percent skimmed off the top. 'Why can't I just write a check to Samaritan instead?' But once you're involved, you understand you're getting visibility."¹⁸⁷

"Community Shares needs to raise more money. They can't afford to lose Sheila Watkins. Sheila Watkins can't do it by herself. Somehow they have to get money to run headquarters. I told them, 'I can't ask for money for you because I get paid to ask for money for here at Planned Parenthood. Around here there was the misconception that if people gave to Community Shares, they didn't need to support Planned Parenthood. So we had an education lesson."¹⁸⁸

That education process often focuses on helping member organization board members and staff to understand that there are many spin-off effects of belonging to Community Shares, and that the fates of NOCS and its member organizations are bound up with each other. The organizations get visibility in the community, which can lead to donations coming outside of the workplace campaigns, a better chance at winning funds from local foundations, and access to training and technical assistance resources that otherwise may have remained invisible. But achieving these advantages also means working to achieve greater visibility for NOCS itself.

"When you talk to the public, they know who United Way is. I have two goals-to get Vail Meadows' name out there, but I also have a vested interest in the success of Community Shares. I had a difficult time getting into United Way. We were told we didn't fall under their mission. It was made more difficult than it was worth."¹⁸⁹

Competition for Funds

Another challenge for maintaining the solidarity necessary to help NOCS prosper is the competition between groups in receiving workplace funds. Working campaign speaking engagements are highly sought after, and NOCS continues to search for a system of allocating those speaking engagements that everyone defines as fair. This issue cuts a number of ways. One of the sources of competition is between small groups serving a small local area, such as the community development corporations and larger, sometimes more visible, regional organizations.

"How does an LDC compete against a falcon or a Planned Parenthood? Even with the redistribution [of undesignated funds] they get more money. We're a

“The animal groups have done very well. We went to the Wood County Humane Society and their budget for Community Shares [campaign] was for \$500, and they got \$5,000 from the campaign.”
[Chuck Campbell]

*small local organization. Planned Parenthood is a well-known national organization and animal groups are popular. Is there a more fair formula?*¹⁹⁰

The other main source of competition revolves around the "animal groups," as they are often known by the nonanimal groups. NOCS members treat the competition with humor and a healthy attitude, and some realize they are overstating the distinction. The "animal groups" range from a Humane Society animal shelter and a wildlife rehabilitation center that are seen as providing service directly to nonhuman animals (even though they also do significant education programs with human animals), to organizations that use animals in serving human clients. But it is the case that the animal groups do quite well in the workplace campaigns, and there is recognition by all involved that the animals are an important draw in those campaigns.

*"It's those dogs and hawks. Who can compete with that? It was cute, we went on the Sandpiper cruise, and I was on the committee to raise money. Someone from Assistance Dogs of America came and brought the dog on the boat as part of its training--getting it used to different situations. Everyone was petting it and giving it treats."*¹⁹¹

*"The animals are our tools to develop our riders and our volunteers. I can't take a horse with me everywhere I go. I talk about the clients. But I can't get around the fact that people are going to remember that I work with horses."*¹⁹²

Of course, the "animal groups" also want to be recognized for the amount of work they contribute. All of the groups are highly involved in NOCS, and two of them hold officer positions in the organizations.

*"It's harder for people than animals. They can tell their sob stories, and I come out with a great horned owl. I'm the one who brought the animal agencies on. It's been good for Community Shares. It gives them something to be recognized for."*¹⁹³

*"We were top funded last year. And they said, "Yeah, she's got the dogs." And that may be true. But I also busted my butt."*¹⁹⁴

The success of the animal groups and some of the larger organizations with more visibility also leads to discussion over the best individual strategies for increasing campaign receipts. There is not an agreed upon model within NOCS, but at least a couple of considerations.

*"If you're not getting the funding you want, it may be the approach you are taking. We use a lot of humor in our presentations."*¹⁹⁵

*"One of the issues is our name. FLRP will probably be changing its name. It's too hard to relate to. Hopefully we can get our name changed before the next campaign. We have to find some way to be more vital in there so we can make it work for us."*¹⁹⁶

It is important to understand that the internal competition for funds is not disruptive, even when it gives rise to discussion over how to allocate funds. The original formula has stood since practically the organization's founding, and while there are occasional thoughts about tweaking it, there are no demands for a wholesale revision. And there are others who attempt to reframe the competition altogether:

*"Some might think that the NOCS member agencies compete for the same funding resources. Rather it makes each of us stronger as a group when we realize that the problems we face are the same that Northwest Ohio Community Shares faces, putting us on a fast track to solving those problems."*¹⁹⁷

The question of how much to expand the current membership, however, does give rise to rich discussion among the members. Now that NOCS is a real force on the Toledo workplace campaign scene, everyone wants in. NOCS has actually done a pretty good job at balancing its growth of organization members with growth in workplace access. But if growth in workplace access is leveling off, the discussion over the optimum number of member organizations is likely to be renewed. And NOCS members take diverse positions on the question of growth. Most members understand there is a balance between the number of workplaces to which NOCS has access and the number of members it can sustain.

*"At the planning retreat in 2001 we felt the momentum of our growth and decided to do a five-year plan. We wanted 30 members by 2005. We didn't realize we could have had 30 members then. It's a chicken-egg problem. If we grow too fast, it won't be worth it financially. You need to add employees to get greater growth. You tend to level off after a while in a single workplace."*¹⁹⁸

But there are many different perspectives on what the balance should be. Some want to see growth in access to workplaces before growing membership.

*"I never thought it would get that large. ... I think if you have 15-20 groups, already that's pretty large. But if the campaign grows, you can have more."*¹⁹⁹

Others believe that bringing in more members will help leverage access to more workplaces. And yet others believe that bringing in more organizations will provide more voluntary labor to do NOCS' work.

**"On the campaign pledge cards you have this huge laundry list of organizations, and that concerns me.
[Jim Spilburg]**

“It’s very hard to integrate these diverse people into the group. When you’re new in that group, it’s hard to understand all the intricacies.”
[Betty Morais]

“I don’t think it’s an issue now of NOCS having too many membership organizations. I’m a proponent of the larger the number, the more participation you can expect from each agency.”²⁰⁰

Perhaps one of the most important questions currently facing NOCS is the attempt to address the increasingly competitive workplace campaign scene as more and more federations apply for workplace access. Through the leadership of the Stranahan Foundation, NOCS and United Way have been involved in discussions about what criteria should be used to determine which federations are allowed into workplaces. Much of the discussion revolves around the question of whether federations should be composed of groups that serve the local area. Most of the public workplaces are now considering policies that include this requirement.

“What we didn’t address [previously] is how do you evaluate other requests. Community Shares, when they approached, they were local groups. We’ve now recognized four groups. We are looking at the policies of other jurisdictions. We are meeting with the University of Toledo and Owens. It might be conducive for all of us to have a similar policy. Allowing groups that are local might be the line we take.”²⁰¹

The member organizations are also thinking along those lines, and are trying to find a fair way to develop a policy that emphasizes the importance of local benefit without unfairly excluding other groups.

“Steve Stranahan is trying to use the power of his purse to bring everyone to the table. He’s doing the right thing. Right now his concern is with other groups that aren’t local. We’re pretty much in agreement. Steve Stranahan wants to help with that. If you allow all of these other funds in, the money leaves the area.”²⁰²

At the same time, however, NOCS members are concerned that the creation of a policy might backfire on their own member organizations that operate regionally or are managed out of a remote office even when their work is local.

One of the other ways to build and maintain solidarity in NOCS is to provide more than money to its member organizations. NOCS already accomplishes that to a certain extent through the relationships that develop. But members want even more. Some people feel like the relationships between old and new members, as well as the transmission of NOCS culture, has not occurred fully for the newer members. And the new members tend to agree. There is a desire for more opportunities to develop relationships with each other, even when there is a realistic understanding of how hard it is to find time to take advantage of such opportunities.

Some organizations find their own ways to build those relationships, informally, or formally. Indeed, as many as half of the NOCS members will linger after a board meeting for 15 minutes or more, often talking as much about their own organizational issues as NOCS organizational issues.²⁰³ Others use speaking opportunities to spend time with each other:

*"It is nice when a group of us talk and share stories. At the Owens campaign they gave us a tiny table for four of us, and one person staffed the table and the other three went out and spilled our guts to each other. We should take opportunities like that as they arise."*²⁰⁴

There is a strong emphasis within NOCS for short, focused meetings. But there is also a desire for more relationship building activities among some members.

*"When I went to the first couple of meetings, I looked at it as a great opportunity for organizations to educate each other. I would rather create a more focused opportunity, even if one once or twice a year. If at each month's board meeting, if two or three agencies could get three minutes to give something about what they're working on that they would like a suggestion or an idea on, it would only take 10 minutes. We don't have a lot of time to get to know each organization, so you almost have to make three minutes here or there."*²⁰⁵

Some newer members approach NOCS with a more pragmatic perspective, but still see the potential benefits of relationship building.

*"I don't necessarily need to know what other agencies are doing. Getting to know each other individually as a networking situation is hard. I'm kind of out in Swanton, so I'm not really in the Who's Who as far as nonprofits in Toledo. I don't see a lot of sharing of information going on, only because there hasn't been the venue to do that. I'm also with the Nonprofit Resource Center. I presented their board training series to the Community Shares board. Because of that workshop series they [NRC] have started a brown bag lunch. I think I'm getting more out of that. But when we [CS] come together, we are talking about Community Shares. I don't see that [interorganizational networking] as a mission of Community Shares. Community Shares is definitely there for equal access to workplace giving. As a side thing, sharing resources would be nice. It certainly is educational knowing how each organization operates."*²⁰⁶

Some of those more pragmatic interests might also be met through more relationship building as well:

"I really do want to take the bus trip and visit some of the other organizations."
[Rhoda Miller]

“Yes, it's a way to communicate with the other nonprofit organizations and to learn from what they are doing. There is kind of a mutual sharing going on. In a certain way there is a social component and I enjoy the people.” [Deb Cooper]

"When you look at Community Shares, if there were some way for our organizations to share more, in space, or insurance, leasing, or other things where you get together [it would help cut costs]. Community Shares could be very beneficial if you could get organizations together for administrative purposes or to save on rent. It would have to be intentional and I don't know if that should be Sheila Watkins's job. Whether you're Beach House or Planned Parenthood, there's some commonality when it comes to the business function. You've got Focus, IHN, Beach House; many of them are dealing with the same issues. If you had those like-minded organizations talk to each other, it might help them strengthen. How do you implement that? Who starts it?"²⁰⁷

"Many agencies I have gone to speak with have some awareness of NOCS. I have a good feeling when I have gone to the workplaces where I have educated a fair number of people. One of the important things is that I have met people who can collaborate with us on programs. Grantors want to see organizations collaborate. I've spoken with several of them [other agencies] and shared information about things like funding and how to manage volunteers. We did one field trip with Harbor House. Now, as they move their residents into volunteer work, they may be able to send some of them here. Harbor House stopped me after a board meeting and said she wanted to do that. We sat for 15 minutes on the Sandpiper and then I introduced her to my volunteer coordinator."²⁰⁸

As the first quote in this set notes, however, doing such things requires organizational capacity, and NOCS may not have the capacity to engage in these solidarity-building activities. Developing such capacity—to handle more campaigns, engage in more organizational development, manage the increasingly complex and political workplace-giving context, and becoming an institutionalized force in Toledo—leads to the final set of tensions facing the organization.

NOCS Structure and Capacity

Because NOCS operates as a hybrid between a coalition and a cooperative, it has a board structure that emphasizes the involvement of all the member organizations in both the decision-making of the organization and its actual work. Such a structure has a number of advantages. It keeps the member organizations connected to the ongoing work of the organization, creating accountability for both NOCS and the individual groups. It also helps build relationships between the groups. And it makes sure that NOCS remains controlled by the groups that are its beneficiaries.

Such a board structure also creates a number of challenges. For one thing, it requires

the organizations to commit significant time from their own organizations. Preferably, that commitment should also be consistent, since NOCS is a complex organization, and an organization that sends different representatives each month could quickly lose track of the many tasks and requirements that need to be met to keep NOCS going. And it is difficult for a number of organizations to achieve that consistency.

"I'm now with NIP, and they wanted to belong but had nobody who had time to go to the meetings. Not everybody has the luxury of going to all these meetings."²⁰⁹

"Consistency is crucial. Those organizations that don't have consistent representatives won't have a very strong voice. I didn't want full responsibility to be our rep, so I also wanted our board members to do it, but then I thought it was worth my time."²¹⁰

"I see it as more of a volunteer project. It's not just a rubber stamp board. I think that's the style of Shares-type groups. That's why I'm trying to get an active volunteer. I think the pool of people for us is small who would do that. The Latino community is stratified. We're mainly into the new wave. The old timers still come to events. Our real push is with that new wave of immigrants. From that group it wouldn't be fair to them, languagewise. Most [members] of the older group are affiliated with other groups where it would almost be a conflict of interest to ask them. I've had to step in because staffwise it just fell to me."²¹¹

As the last quote illustrates, the challenge of getting member organizations' volunteers to participate in NOCS board meetings often means that staff attend the meetings. And often those staff are executive directors. There is an interesting sense of difference between the board members of individual organizations who attend NOCS meetings, and the executive directors. Some joke about the number of type A personalities on the board, mostly a result of the number of executive directors who participate, and who must be driven if their organizations are going to survive. The distinctive style of the executive directors also leads some of the board members who are not executive directors to wonder if the executive director representatives feel their attention too divided between NOCS and their own organization. While that does not seem to be the case with the directors as a whole, it may be that executive director participation can limit NOCS' reach outward to the community and expansion of its skill base.

"It would be frustrating to have executive directors of everyone's organization there-too many chiefs."²¹²

"We have a disconnect between the board and the individual agency boards. I think every single year, somebody from Community Shares, maybe the executive committee, should visit each member board. But there's always so much current stuff to do that it's

hard to do the extra stuff."²¹³

"When you come to Community Shares, you have a board composed of many people who are executive directors of their own organization. So you don't necessarily have the skills bank you need."²¹⁴

This feeling is particularly strong for those supporters outside of NOCS.

*"You need influential friends. You need inside contact. Whoever it is. Coming in as an outside organization, it's a very hard sell. United Way is already on the inside. They have on their board people from all the major organizations. Community Shares needs to get more people on their board who are influential in those other organizations. There has to be some kind of personal link on both sides-preferably somebody who is influential."*²¹⁵

"I do think if they're using a payroll deduction system, leadership at the employer's management level is important. Community Shares needs corporate leadership that understands the kinds of agendas that Community Shares supports. The world is changing, and there are more and more social justice issues. Somehow Community Shares has to get themselves educating top management."²¹⁶

Another challenge to such a board structure, particularly with a growing organization, is the question of board size. With 23 organizations, and regular board meeting participation from nearly all of them, there is quiet worry whether NOCS may have to shift to some sort of smaller representative decision-making group. The formation of a strong executive committee with decision-making powers is one way that NOCS deals with the size issue, and so far that seems to be working. Since the executive committee reports back to the full board, there is an opportunity to override the committee's decisions, which happens from time to time. There are not hard and fast divisions among the members, regardless of jokes about the "animal groups," and an acceptance of strong opinions that some would even like to see increased.

*"I don't think we've encountered any major conflict in passing decisions. The issues are not extremely complicated. Our strength right now is in our ability to have a voice from each member agency. I would like to see more participation from each board member, but I am sure that this a reoccurring problem with most nonprofit boards"*²¹⁷

*"This group certainly will share their opinions. They're not afraid to share it and receive it."*²¹⁸

There is very little support for limiting decision making much further, but some support for structuring it more, particularly with more strategic use of subcommittees:

*"I'm not so sure that designating a few to make decisions is wise. There's been some discussion of designating a core group. I would want to do more research on that. A lot of groups are concerned about giving up too much. I don't think anyone is anxious about getting that group up to 30."*²¹⁹

*"If there's more members, the board will get too big, and they may have to divide up into committees."*²²⁰

*"In a coalition of groups, it's harder to see that everybody is participating. The committees are functioning, and the executive committee is only the four officers. I've felt the executive committee should select representatives from two agencies, like a newer agency and a longer term agency, and put them on executive committee. The executive committee doesn't make decisions for us. We voted down a couple of executive committee decisions."*²²¹

*"We have to learn to trust committees better. We need better communication before meetings. It would be helpful if committee recommendations were in the mail a week before the board meeting. This has happened to some extent. I've also asked people to let me know what's coming up. We are coming to the point where we will not be able to have a board meeting of all the members. I'm attending the board trainings given by the collaborative. I want to look at some different structures. Maybe we could meet quarterly with all the agencies. I'd love to find a way to have all 30 there. Maybe we could have every group on a committee."*²²²

*"The board of directors of NOCS is a start of the agency's strength. Subcommittees are formed to get members involved in an ongoing basis and share ideas in the operation of the agency."*²²³

*"There is a working finance committee. The executive committee works well. The structure has improved over the last 18 months."*²²⁴

Because NOCS is centrally focused on fundraising, the finance committee has a lot of pressure placed on it. The committee has worked diligently to structure itself, including finding the needed talent. It has also had to take the lead in educating other board members on the need for specific kinds of financial procedures, such as using a payroll service rather than trying to manage payroll internally.

"The IRS has made it very clear that any board member involved in the financial operation of a nonprofit organization is responsible for any unpaid federal tax liabilities. Board members are becoming concerned about this exposure and may limit their sub-

“We take a whole day to do strategic planning sessions. One of the board member's husbands has been leading us. Now they've become goal setting sessions and how to get there.” [Terry Glazer]

committee participation. The financial subcommittee has an important responsibility in overseeing the fiscal operation of the agency. I feel that a potential problem becomes an eminent liability when you are lacking key financial/operational procedures for the agency to follow. And I think we're very good about that.”²²⁵

Because NOCS is relatively new and has been growing so quickly, however, board members feel a need for further organizational structuring. One of the most interesting tensions is not felt within NOCS itself but within its individual members, who feel torn between wanting more time for discussion at board meetings and wanting meetings done quickly. Everyone, including the board president, feels the pressure to get meetings done quickly, but most everyone also participates a lot. It is not a situation where a few people regularly talk too much or too tangentially. There are just a lot of issues, and NOCS board meetings could easily be twice as long and twice as productive. And while a member may express mild frustration at the amount of conversation given to one issue, as soon as the issue they care about comes up, they leap into the conversation with earnest.

Ultimately, the issue is time--time for the board members and executive director. The work of NOCS has grown exponentially, while its board and staff time have grown only additively. Consequently, while the essential work is always accomplished, other things occasionally slip through the cracks, reports are not always available, and some details fall by the wayside.

“The reports are not being sent out in advance. As you grow you lose some tightness. You're almost flying by the seat of your pants. I like to see things laid out, like even have a planning calendar for doing things at certain times of the year. I'm glad Sheila Watkins is going to board training.”²²⁶

“I think we have made some real strides in gaining respect. But I also see a lot of real vital things that need to happen to make it viable. I see Sheila Watkins as being there all by herself. She can't concentrate on any one thing because she's doing everything.”²²⁷

This question of time leads to a discussion over how effectively the working board model functions for NOCS, and what the board-staff relationship should be. Some wonder whether the NOCS executive director position needs to be reconfigured, with perhaps more duties transferred to a second staff position. Some ask how well an organization managing workplace campaigns involving tens of thousands of employees and hundreds of thousands of dollars can work by relying on so much voluntary labor. But while there is a desire for more staff support, there is also continuing support for the working board model.

“I prefer having a working board. I'm not good at sitting at meetings. I need to

*be doing the work. I'm concerned about the size a bit. When you have 25 to 30 strong personalities, it can get cumbersome and thin out who is willing to do the work. If I want Community Shares to succeed, then I've gotta be willing to put in the work. The work that has to be done requires paid staff. At some point we will need an administrative assistant. One thing I like to point out in work-places is that we are a working board."*²²⁸

*"I think it will always fall down to that 80-20 thing. Everybody in the board also has their own agenda. I would rather see us building a staff that can do the work. I don't have a lot of time to, for example, do a newsletter for Community Shares, even though that would be a benefit. Even with enough money to hire more staff, board members should still do the speaking. I'm not doing anything extra. When I'm out there promoting my agenda, I also have a Community Shares sign. Public relations and marketing should be done by the staff. Bonnie Berry is shouldering the responsibility for that. I feel bad for her. Board members don't have the time to do these kind of things. That is the same kind of issue for my organization. Keeping up the Web site, a newsletter, etc., is difficult for a board to do. I'm hoping the board can help with access, but I don't see the support staff doing a lot of access work. I think Sheila Watkins can do more on access. She relies on the board too much for that. The executive director also needs to bear part of the responsibility for operational support. But Sheila Watkins is a one-man show, so it's not her fault. The board has enough to worry about for development of their own organizations, and the staff needs to do more of that. I would love to see the board take on more of a role in development, but in these tough times, that's hard for even our own agencies."*²²⁹

*"Because it's [CS] young, it's very important for it to be a working board. People shouldn't be accepted without having an understanding of what is required. I think as a working board you can stand behind the 20 percent admin."*²³⁰

One of the most important needs of NOCS that causes it to reconsider its structure is operating support. This is the classic catch-22 problem-it takes a lot of work and time to get support for doing all that work and finding all that time. The concern is deepening as the Stranahan Foundation has indicated it will begin decreasing its funding of NOCS. The challenge of finding operational support has been a prominent discussion at the annual planning retreats, particularly as it affects NOCS' ability to engage in public relations and outreach activities.²³¹ By mid-2003, NOCS had fallen well short of its goals of getting radio and TV coverage and even sending out news releases.²³²

NOCS has not been sitting on its hands, having organized a number of fundraisers for operating support. One letter sent to 45 potential donors raised \$3,500.²³³ But oth-

fundraisers have not been as successful, and NOCS lacks the internal talent to come up with a confident plan for raising operating support.

NOCS is not adrift on this question. NOCS conducts all-day strategic planning retreats, where it confronts the major questions facing the organization. As NOCS entered its 2004 retreat, the operating support question, and its related issues of public relations and outreach, were once again central questions. In addition, the context of growth that NOCS had been experiencing may also require revision. In the past, NOCS has been trying to decide between constant percentage growth, linear growth and exponential growth models in predicting and guiding its future.²³⁴ As the national and local economies continue to slide, NOCS may be facing a new set of challenges.

CONCLUSION

Inevitably, as much as I try to write a report like this from the words and experiences of the participants, it becomes my work, written through my filters. And then it is read through the readers' filters. So it is especially important to provide some summary statements that give an overall impression that the words, in their detail and lengthiness, may not have conveyed. It is important for readers to know that, with all the trials and frustrations, this is an amazingly solid group. The internal critiques from members come not from a sense of dissatisfaction but from an energy to do even more, faster and better. And no statement about the accomplishments of NOCS, and how much more it means than money, can be presented better than from the members themselves:

*"Most groups take two to three years to get going. There are a lot of good organizers involved in Toledo. ... NOCS also has a very good leadership and a savvy board."*²³⁵

*"I've lived all over the country, and I look back on my three years there very fondly. I made some great friends. It was a great time."*²³⁶

*"Overall it's been a great group, and what may be underrated about it is that I'm meeting people from groups I'd never have the opportunity to meet."*²³⁷

*"Obviously we are pretty strong-willed or we wouldn't have started our own nonprofit organization. I actually enjoyed the people on the Community Shares board. The meetings were fairly quick and fairly productive."*²³⁸

*"It's amazing we are friends. There's definitely a lot of A's [type A personalities]."*²³⁹

*"I think that Shares has turned the corner."*²⁴⁰

About the Author

Randy Stoecker is a Professor of Sociology at the University of Toledo, and is the moderator/editor of /COMM-ORG: The On-Line Conference on Community Organizing and Development/ (<http://comm-org.utoledo.edu>). His areas of expertise include community organizing and development, participatory research/evaluation, and community information technology.

He has been involved in numerous participatory research projects with community development corporations, community organizing groups, and community information technology programs. He has also been helping build and evaluate university-community collaborations-facilitating a participatory evaluation with the Policy Research Action Group in Chicago; and designing/facilitating workshops and evaluations with the Bonner Foundation's Learn and Serve America Community Research Project.

He has recently conducted participatory research with a community organizing training and assistance program, a Weed and Seed program, a Chicago ACORN grassroots school improvement campaign; and a Minneapolis community development corporation. He is currently involved in two research projects--one documenting the research and data needs of nonprofit organizations in Toledo, Ohio USA-the other documenting the information and information technology needs of neighbourhood houses in Melbourne, Victoria, Australia with Larry Stillman.

He has worked regularly in Australia with community development professionals helping marginalized groups access the Internet, and delivered keynote speeches at the 1998 "Communities Networking/Networking Communities" conference at the Victoria University of Technology, the 2000 "Creating and Sustaining On-Line Communities" conference in Mandurah, and the 2002 "Community and Information Technology: the Big Questions" search conference in Melbourne.

Randy has written extensively on community organizing and development, including the book /Defending Community/ (Temple University Press, 1994), participatory research, including co-authoring the book *Community-Based Research and Higher Education* (Jossey-Bass, 2003), and community information technology. You can find his complete vita at <http://sasweb.utoledo.edu/vita/stoeckvita.htm>.

Notes

1. Mike Ferner interview
2. Wendy Jerome Stern interview
3. 5-27-97 minutes, 6-4-98 minutes
4. 1-29-98 minutes
5. 4-2-98 call report
6. 4-24-98 minutes
7. 4-9-98 call report
8. 4-2-98 call report
9. 5-7-98 minutes
10. 4-2-98 minutes
11. 5-27-97 minutes
12. 4-2-98 minutes
13. 4-2-98 minutes
14. 4-21-98 letter from Terry Glazer to Peter Ujvagi.
15. N.O.C.S. News, spring 1998, p. 2
16. 4-2-98 minutes
17. 3-5-98 minutes
18. 4-2-98 minutes
19. Stephen J. Kovatch 4-22-98 letter to Bill Senhauser
20. Terry Glazer interview
21. Terry Glazer interview
22. 6-4-98 minutes
23. 3-5-98 minutes; 4-2-98 minutes
24. 8-3-98 Toledo Blade, Fund Firm has Trouble Getting Started by Michael K. Massie, p. 1, 12.
25. 5-7-98 minutes
26. 12-3-98 minutes
27. Northwest Ohio Community Shares, Inc. Audited Financial Statements, December 31, 1998, [omitted]..
28. 8-3-98 Toledo Blade, Fund Firm has Trouble Getting Started by Michael K. Massie, p. 1, 12; N.O.C.S News
29. Wendy Jerome Stern interview
30. 5-7-98 minutes
31. 6-3-99 minutes
32. Wendy Jerome Stern interview
33. Steve Stranahan
34. Northwest Ohio Community Shares Inc. Audited Financial Statements, December 31, 1999, Accounting Center.
35. 10-7-99 minutes
36. Kevin Ronnie interview
37. Chuck Campbell interview
38. Terry Glazer interview
39. Wendy Jerome Stern interview
40. Mike Ferner interview
41. Terry Glazer interview
42. Betty Morais interview

43. Bill Senhauser interview
44. Bill Senhauser interview
45. 4-2-98 letter from Glenn Richter to Bill Senhauser
46. 4-13-98 letter from Bill Senhauser to Mayor
47. 6-5-98 letter from Susan L. Vrooman to Glenn Richter
48. 6-16-98 letter from Glenn Richter to Suzan L. Brooman
49. Peter Ujvagi interview
50. Peter Ujvagi interview
51. 4-21-98 letter from Terry Glazer to Peter Ujvagi
52. Mike Ferner interview
53. 8-3-98 Toledo Blade, Fund Firm has Trouble Getting Started by Michael K. Massie, p. 1, 12.
54. Mike Ferner interview
55. 4-1-99 minutes
56. 5-6-99 minutes
57. 6-3-99 minutes
58. 8-3-99 city council meeting audiotape
59. Pulling for charity: Community Shares quells United Way fears of Losing donations, by Bob Seybold, Toledo City Paper, May 25-31, 2000. Toledo Blade , 9-3-99, Vanessa Gezari, City Workers May Get Extra Charity Choices.
60. 9-2-99 city council finance and budget committee meeting audiotape
61. Toledo Blade, 9-3-99, Vanessa Gezari, City Workers May Get Extra Charity Choices.
62. 9-2-99 city council finance and budget committee meeting audiotape
63. Betty Morais interview
64. 9-14-99 city council meeting audiotape
65. Pulling for charity: Community Shares quells United Way fears of Losing donations, by Bob Seybold, Toledo Blade City Paper, May 25-31, 2000. CS news conference packet.
66. Peter Ujvagi interview
67. Mike Ferner interview
68. Bill Senhauser interview
69. Betty Morais interview
70. Ed Ciecka interview
71. 10-7-99 minutes
72. Ed Ciecka interview
73. Toledo Blade 1-10-2000 Payroll Deduction for Charities OK'd, no author, second section
74. Chuck Campbell interview
75. Steve Stranahan interview
76. 10-7-99 minutes
77. 12-2-99 minutes
78. Steve Stranahan interview
79. 3-9-00 minutes
80. Ed Ciecka interview
81. 3-9-00 minutes
82. 4-4-00 minutes.

83. Sheila Watkins interview
84. 1-6-00 minutes
85. 5-4-00 minutes.
86. 3-9-00 minutes.
87. Sheila Watkins interview
88. 3-1-01 minutes
89. 4-5-01 minutes
90. 12-7-00 minutes
91. 6-1-00 minutes
92. 9-7-00 minutes
93. 8-17-01 minutes
94. Northwest Ohio Community Shares Inc. Audited Financial Statements, December 31, 2000, Accounting Center.
95. 7-12-01 minutes; 8-17-01 minutes
96. 7-12-01 minutes
97. 9-01 Director's report
98. 10-01 Directors report.
99. 2-15-02 minutes
100. 7-12-01 minutes
101. 8-17-01 minutes
102. 1-4-01 minutes
103. Sheila Watkins interview
104. 12-01 directors report
105. 2-15-02 minutes
106. Sheila Watkins interview
107. 11-16-01 minutes
108. 3-1-01 minutes
109. 11-16-01 minutes
110. Chuck Campbell interview
111. Deb Cooper interview
112. Robin Shinaver interview
113. Chris Diefenthaler interview
114. 6-7-01 minutes
115. Dave Lindsley interview
116. Dave Lindsley interview
117. 4-1-99 minutes
118. 12-3-98 minutes
119. Wendy Jerome Stern letter to the NOCS, n.d. Meeting also reported in 7-1-99 minutes
120. 9-2-99 minutes
121. Flyer, How will Northwest Ohio Community Shares effect United Way Fundraising? N.d.
122. Dave Lindsley interview
123. Dave Lindsley interview
124. Dave Lindsley interview

125. Sheila Watkins interview
126. 4-02 directors report.
127. Dave Lindsley interview
128. Dave Lindsley interview
129. 4-19-02 minutes
130. 2-15-02 minutes
131. 6-21-02 minutes; 8-16-02 minutes.
132. 2-15-02 minutes; 12-19-03 fieldnotes
133. 5-16-03 minutes
134. actual was \$106,400, and employee goal was 25,000 with actual at 21,200. New member goal was 6 and got 9. 2002 evaluation and planning day summary. Other document says 2002 total was \$111,638 and still counting NOCS Retreat Planning, February 7, 2003. 2002 campaign nets \$122,774. 3-21-03 board meeting
135. Community Shares, Northwest Ohio Final Report, May 30, 2003.
136. 3-4-03 minutes
137. 6-02 directors report.
138. Betty Morais ininterview
139. p. 4 Community Shares, Northwest Ohio Interim Report, November 1, 2002.
140. Chris Diefenthaler interview
141. Sheila Watkins interview
142. Chuck Campbell, Sept meeting field notes
143. 12-19-03 meeting field notes.
144. 12-19-03 meeting field notes.
145. P. 4 Community Shares, Northwest Ohio Final Report, May 30, 2003.
146. Chuck Campbell, Oct meeting fieldnotes
147. Deb Cooper, 12-19-03 field notes
148. Chuck Campbell interview
149. 3-21-03 board meeting
150. 4-25-03 minutes
151. 2002 eval and planning day summary
152. Nov. board meeting field notes.
153. NOCS Retreat Planning, February 7, 2003.
154. Betty Morais interview
155. Deb Cooper interview
156. Jim Spilburg interview
157. Chris Diefenthaler interview
158. Bonnie Berry interview
159. Kevin Ronnie interview
160. Bill Senhauser interview
161. Terry Glazer interview
162. Kevin Ronnie interview
163. Sheila Watkins interview
164. Rhoda Miller interview

165. 12-19-03 board meeting field notes
166. Sheila Watkins interview
167. Jerry Ceille interview
168. Kevin Ronnie interview
169. NOCS annual retreat field notes, 1-30-04
170. 2-7-03 MCCC board retreat
171. Terry Glazer interview
172. Deb Cooper interview
173. Robin Shinaver interview
174. Chuck Campbell interview
175. Chris Diefenthaler interview
176. Jim Spilburg interview
177. Kevin Ronnie: In Montana, the ACLU took on a murder case. The farm-ranch land conservation coalition, which was also in Community Shares, went ballistic - and left Montana Shares: one of their members was related to the murder victim. But that's really the exception. Milwaukee has been a fighting ground for school choice for years. There are groups on both sides of the issue involved in Community Shares." Kevin Ronnie
178. Steve Stranahan interview
179. Jerry Ceille interview
180. Rhoda Miller interview
181. Sheila Watkins interview
182. Deb Cooper interview
183. 12-19-03 meeting minutes
184. Robin Shinaver interview
185. 6-4-98 minutes
186. Mike Ferner interview
187. Jim Spilburg interview
188. Rhoda Miller interview
189. Robin Shinaver interview
190. Terry Glazer interview
191. Rhoda Miller interview
192. Robin Shinaver interview
193. Deb Cooper interview
194. Chris Diefenthaler interview
195. Deb Cooper interview
196. Jerry Ceille interview
197. Jim Diegel interview
198. Sheila Watkins interview
199. Jerry Ceille interview
200. Jim Diegel interview
201. Ed Ciecka interview
202. Terry Glazer interview

203. Oct., Nov., Dec. fieldnotes.
204. Robin Shinaver interview
205. Robin Shinaver interview
206. Chris Diefenthaler interview
207. Jim Spilburg interview
208. Robin Shinaver interview
209. Jim Spilburg interview
210. Chris Diefenthaler interview
211. Jerry Ceille interview
212. Chris Diefenthaler interview
213. Betty Morais interview
214. Jim Spilburg interview
215. Dave Lindsley interview
216. Steve Stranahan interview
217. Jim Diegel interview
218. Chris Diefenthaler interview
219. Chris Diefenthaler interview
220. Rhoda Miller interview
221. Betty Morais interview
222. Chuck Campbell interview
223. Jim Diegel interview
224. Jim Spilburg interview
225. Jim Diegel interview
226. Chris Diefenthaler interview
227. Chris Diefenthaler interview
228. Deb Cooper interview
229. Chris Diefenthaler interview
230. Robin Shinaver interview
231. 2002 Evaluation and Planning Day Summary. MCCS Retreat Planning, February 7, 2003.
232. Community Shares, Northwest Ohio Final Report, May 30, 2003.
233. P. 8 Community Shares, Northwest Ohio Final Report, May 30, 2003.
234. NOCS Retreat Planning, February 7, 2003.
235. Kevin Ronnie interview
236. Bill Senhauser interview
237. Terry Glazer interview
238. Deb Cooper interview
239. Chris Diefenthaler interview
240. Jerry Ceille interview

The Power of Relationships: Northwest Ohio Community Shares

© 2004 National Committee for Responsive Philanthropy



**national committee for
responsive philanthropy**

For information or copies of this report, please contact NCRP:

2001 S Street NW, Suite 620 • Washington, DC 20009

Phone 202.387.9177 • Fax 202.332.5084

E-mail: info@ncrp.org • Web: www.ncrp.org
