Sobel & Co., LLC
CERTIFIED PUBLIC ACCOUNTANTS AND CONSULTANTS

Marketing Your Nonprofit Organization

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Abstract

This white paper will draw the distinction between a nonprofit organization's marketing and branding efforts and its donor development activities. As such it will present a range of integrated marketing tactics that can be adapted by most small to mid-size organizations to help enhance their reputation and gain greater exposure in the community leading to more effective interactions with donors and volunteers.

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What Does “Marketing” Mean to the Nonprofit Sector?

While conducting the research necessary to write this white paper, we came across a blogger who focuses a good amount of attention on the nonprofit community. Through *Beth’s Blog*, the author coined the phrase “turning slacktivists into activists,” which we thought was the perfect way to define marketing and its role in the nonprofit sector.

It is the objective of every nonprofit to use marketing to turn slacktivists into activists, building a cadre of passionate supporters, nonprofits need to use various marketing approaches to gain mind share, heart share and wallet share of their current and potential volunteers, donors, and clients.

Marketing is NOT a capital campaign.
Marketing is NOT donor development.
Marketing is NOT the “ask.”

Marketing IS the process by which nonprofits combine a range of strategies that work together to create awareness, generating a positive image by communicating effectively with a *targeted* audience. Under this definition, marketing provides the structure and discipline for continuously demonstrating the group’s value to the community it serves. Further, we believe that organizations that embrace a formal marketing process have a distinctive advantage over those organizations that prefer to take a less structured, less organized approach. Having a well-thought out marketing plan is like having a blue print, or a map, for guidance in gaining the credibility and loyalty they need to succeed at their mission.

Our experience with nonprofit organizations for more than 50 years has shown that, no matter what the size of the group, nor how extensive its budget, those nonprofits that clearly and consistently share their vision with the community, enjoy these added benefits:

- They gain credibility while building loyalty

- They can more easily distinguish their organization’s purpose from other nonprofits

- They enhance their reputation as leaders in the nonprofit community

- They build membership / gain volunteers more quickly
- They have more opportunities to strengthen existing donor relations and build new ones

We are confident that this white paper will provide you with the hands-on tools you need to improve your own strategic marketing endeavors.

How to Write a Marketing Plan for Your Nonprofit Organization

To write an effective marketing plan for your organization that will provide you with the insights and guidance you need to stand out from your competitors, you will have to take a step back for a moment and conduct a situational analysis. Even those organizations that already have a marketing plan in place should periodically go through this exercise to ensure that they are remaining relevant and current with their target market.

A situational analysis consists of a process that reviews all your strengths and weaknesses as a nonprofit while also creating a platform to look at the opportunities and threats you face in your market. (This is called a SWOT analysis because it represents your organization's **s**trengths, **w**eaknesses, **o**pportunities and **t**hreats).

Here is an example of some strengths:
-Well known board members
-A powerful vision that resonates in your community
-A high profile, passionate executive director

Here is a sample of some of the weaknesses your organization may have to overcome:
-Board members that do not act as advocates
-A mission that is no longer relevant
-Diminishing volunteer pool

Here is a sample of some unique opportunities that might work for your organization:
-Collaboration with a like-minded organization
-Obtaining a grant for a special project

Some threats on your current or future landscape might be:
-Cut backs in Federal, county or state funding
-Competition from other similar nonprofits
-A reduction in discretionary spending by individual donors

After completing the SWOT, you can leverage the insights you have gained to help you set goals for the organization, recognize your unique attributes, identify your target market, review the programs and services you offer to be sure they are relevant and then, lastly, to put together a list of tactics that you can prioritize and implement over time based on your available resources, including time and money.
It is important to go through each of these steps in order to affirm the organization's continuing value. Know your goals; know what is distinctive about the group, and know who represents your best audience. Armed with

this kind of pertinent data your organization can focus its marketing efforts so that it will be much more efficient and effective.

A budget should be included in your marketing plan as well. Being able to anticipate what your marketing initiatives will cost helps keep the group accountable and targeted. The organization's marketing will assume a more legitimate role when there is money specifically appropriated to accomplish the tasks set forth. A proactive approach is much more desirable and professional than assuming a reactive stance, which forces the executive director to ask the Board of Directors for permission as new ideas are generated. In addition, a more haphazard approach demonstrates a lack of planning and discourages the Board from seriously considering the new ideas. So it is obvious that in order for the organization to have a workable marketing plan, there needs to be consensus regarding the steps, the goals, the estimated cost and the expected Return On Investment (ROI).

The final step is execution of the new or updated marketing plan. Unfortunately, implementation of the marketing plan is the bane of all nonprofit (and for profit) organizations. Conducting an analysis, setting goals, identifying unique characteristics and positioning the organization for the future all may sound terrific on paper. The biggest obstacle is how to get from thought to action. The most reliable way to make sure that the group's marketing plan becomes a living document, instead of a document that gathers dust on the shelf, is to make sure it is practical given the group's capabilities. We also suggest you assign tasks to various people – both paid staff and volunteers – who can help accomplish your marketing goals. Establishing a reasonable time line for completion of tasks will help ensure success.

The executive director, or other staff person, can work with board members and volunteers to create a "to do" list. Some of the projects will take much longer than others to complete. Some may be on going, such as data base management, and others may be more easily accomplished, such as writing your annual report or launching a Facebook page. If you can designate various people to have ownership of the tasks that you believe are most critical for your organization, you will be more likely to achieve your goals. Ask some of your donors, volunteers, board members or even your clients, to review a list of marketing tools you would like to leverage and determine if anyone would like to participate. You will most likely find a young supporter who would be delighted to start up a Facebook page, or even blog on behalf of the organization. You may also find a volunteer with a public relations background who will agree to write press releases on a monthly basis for the group. A board member may offer their home for an intimate evening meant to attract new donors. A graphic designer in the community who believes in your mission may offer to design your print materials. All of this will help you get the job done, but in addition, you will also find that the more people who are involved with your organization in a meaningful way, the faster the word will spread about the group. Instead of relying on a handful of people, you may want to reach out to your most loyal constituents and ask for help. You may discover some hidden talents that can be put to great use for your group as you go about the process of implementing your strategic marketing plan.

Here is a sample of a marketing plan that you may use as a guide. Be sure to gather input from the board as you go through the process, especially as you brainstorm over the SWOT analysis!

<u>Sample Plan</u>

I. Promote your unique position and value proposition:
"We are different because…" (fill in the blanks)

II Establish goals – determine the outcome you expect, as:
We expect to engage # of new donors; # of new volunteers, # of new board members this year – in three years – in five years
We expect to launch various fundraising initiatives, resulting in $
We expect to deliver # of programs/services for our constituents. Serving # of people

III. Review your mission statement and objectives for relevancy and appropriateness. Fill in based on your organization:

Our mission is____
Our vision is______

IV. Conduct a **SWOT** analysis
Gain insights into the internal and external environment of your organization by listing its:

<u>**S**trengths</u>
<u>**W**eaknesses</u>
<u>**O**pportunities</u>
<u>**T**hreats</u>

V. Define your target audience
Know exactly who is most likely to benefit from your services, programs, research or other activities – as well as identify who is most likely to financially support your efforts in these areas.

For example, a battered women's shelter in Newark, NJ may decide its audience is vulnerable women in Essex County who are in danger of physical and emotional spousal violence.

In the same example, volunteers and donors may live in or near the area who have a commitment to help these women attain a normal, safe life style. These may be educated, financially comfortable women in their 30s - 60s.

VI. State the services/programs you offer

By listening to your constituents, your donors, and others in the community you serve, you will gain the information you need to understand exactly what services and programs are most likely to be most valued by them.

For example, do you offer training for the blind and sight impaired? What types of training are available? Do you offer after school programs in low income areas? If so, how do you create the curriculum and activities for the children who participate?

Putting your organization through this process will help you decide which programs to retain as well as help you entertain new ideas that may develop into new, more innovative programs.

VII. Develop an integrated plan using strategic tactics:

Technology - Web site and social media
E-mail
Events
Alliances
PR
Annual Reports
Word of Mouth Referrals

VIII. Budget

Category	**Estimated Cost**		**Actual**
Technology			
Website	$5,000	(annual contract with web provider)	
E-blasts	3,000	(annual Constant Contact contract)	
Facebook	500		
Collateral Material			
Brochures	2,500	(write, design and print 3500 brochures)	
Postcards	1,200	(design and print postcard campaign)	
Public Relations			
Media kit	500	(write and create a PDF of media list to distribute to all local press)	

Based on the sample above, you can create a budget that includes a line item for every major marketing initiative. You can do this by using Excel to produce a simple spread sheet with columns describing the categories and subheadings for specific initiatives along with a column for the estimated costs. As items are finalized, actual costs should be added.

IX. Accountability/implementation time line

After your plan is completed, you can develop dates for executing or finalizing the marketing initiatives that you select based on priorities, along with assignments for specific committees or people when possible, such as:

Project	Completion Date
a. Write, design and print a new brochure	To be completed by March 1 To be done by Sarah Smith
b. Launch a Facebook page	To be completed by June 20 To be done by summer intern
c. Create a press release template and a media kit	To be completed by July 15 To be done by Sam Jones

Key Tactics in Marketing and Branding Your Nonprofit Organization

Website

In today's technology driven environment, a website serves as the natural hub of all the organization's marketing, branding and communications activities. It is no longer an option, and those organizations without a well-designed, attractive and dynamic website will instantly lose credibility when donors or volunteers visit them online.

The website presents almost limitless possibilities for interacting with the group's current and future donors, volunteers and clients across all generations. Statistics show that Baby Boomers (who number about 78 million) are very comfortable online, and the Net-Gen, also referred to as Millenials and Gen-Yers (who number 79 million), have grown up with digital technology, making the organization's website and social media their preferred point of contact. Even the over 65 group is using technology more frequently, with 13% of all online donations being made by this generation.

Beyond the obvious benefits of online giving, the website has the power to help you tell your distinctive story to the world - building loyalty and credibility while showcasing the advantages you offer.

To do this most effectively, you can use testimonials, videos, images (including photos when appropriate), and narrative that is both compelling and transparent. Viewers want to know, not only the good that you do, but the open and honest approach you take to fulfill your mission. You can send this message through your website.

Use your website to cross-sell and cross-promote all the other resources that you offer. For example, on your website you should provide access to the most recent issue of your monthly e-newsletter, your annual report, survey results, press releases, articles, statistics, benchmarks, information about upcoming events and other data that is critical to your audience and enables them to see that you are at the cutting edge of your niche. The more information you provide, and the more current it is, the more likely it will be that visitors will be encouraged to return. If the data remains static, unchanging and irrelevant, your potential and existing supporters will soon get the impression that you are not an organization that is worth investing their time or funds.

Because the search engines look for key words (use Google AdWords and WordTracker for help) and for continuously changing content, you need to be diligent about keeping the site current. Hosting a blog, offering a constantly updated schedule of programs and services, as well as providing a calendar of all your fundraising and networking events helps to attract the attention of the search engines, while at the same time turning your site into a portal for significant information.

Search engines also seek links between your site and others, so as you attract donors (especially corporate sponsors) and form alliances with other for-profit and nonprofit organizations, ask them to display your logo and website link on their web pages. You can do the same in return and everyone will gain increased exposure.

Think about your audience and then address their concerns, offer solutions, and provide the tools they need through an easy to navigate, intuitive website.

Social Media

This is the magic buzzword of today! Social media tools, such as Twitter, personal or organizational blogs, Facebook and YouTube – to name a few – are drawing tremendous attention from the nonprofit community because they are inexpensive (typically free) platforms that are powerful drivers of viral marketing.

All of these provide avenues for telling the world about the good work you are accomplishing. Viewers love to hear (and watch) heart warming stories, stories that show your triumphs, and stories that demonstrate the needs you are trying to address. It's quick, dynamic and interesting.

As you reach out to have a positive and profound impact on your community, leveraging Twitter for daily updates or news and a blog to share your insights and opinions, don't forget the influence of Facebook. This tool represents 90 million users in the United States alone and research indicates that most users are college educated, well connected and more affluent than the average Internet user. If you don't have a Facebook page, you should. And in the process, why not ask all of your board members, volunteers, donors and supporters to mention their connection to your organization on their Facebook pages to all their Facebook 'friends.' Just consider the thousands of people who will become instantly aware of your organization, and who will feel especially connected to you because of the endorsement from someone they respect.

While it is tempting to jump into using social media so as not to get left behind, this tactic, like all tactics, should be carefully considered for its usefulness to your organization. Social media should be one of the key strategic tactics that you employ to tell your story, gain coverage and build loyalty – but it needs to be carefully integrated with a mix of other tactics to provide diversity for your marketing strategy. No single method, no matter how exciting it may seem, will be as effective over time as a balanced approach which leverages a variety of tactics that are appropriate to your situation.

Direct Mail, E-mail and Beyond

This is one tactic that enables you to focus on the exact audience you are targeting. Unlike a website, which is reactive (waiting for visitors to arrive), the use of direct mail and e-mail enables a nonprofit to take a proactive stance with a well-defined audience carefully chosen by them.

While direct mail marketing is still a strong tool for branding a nonprofit, the cost of printing and postage has encouraged most nonprofits to turn to e-mail as a superior alternative.

The challenge for the nonprofit organization that prefers to use e-mail is in building a meaningful database. Once the project of gathering e-mail addresses from a targeted audience is under way (it is a never ending process), the nonprofit can begin using e-mail as a way to keep stakeholders engaged and informed through personalized messages. Nonprofits can promote events, send specific calls to action (such as when there is an emergency situation or a request for names on a petition) to a large, well-defined group, more effectively and at a lower cost than can be matched by any other option. It is also one tool that can be passed along with terrific ease. So whenever an organization is sending an e-mail message, it is a good idea to ask recipients to pass it along to someone who they think will find it valuable. The group's reach will quickly exceed its own boundaries when supporters are enlisted to help expand its horizons.

Whether e-mail is being utilized for the distribution of monthly e-newsletters, to create frequent, relevant interaction with supporters, to send invitations to an upcoming event or to thank a donor, it is an entrenched tool that has enhanced the ability of nonprofits to go to market, using either a broad brush stroke or a laser-focused message, depending on the situation.

The Next Big Idea

Data suggests that e-mail campaigns yield about a 28% response rate. Text messages, though are opened 97% of the time – and 83% are opened in the first hour they are received!

However, texting brings with it special challenges. First of all, cell phone numbers are often carefully guarded, so you will have to get permission from your supporters to text them. Secondly, you will have to be very cautious with the quantity and quality of the texts you send so that you do not become intrusive. If however, you are able to walk the fine line and keep your texts relevant and to a minimum, you may be able to (cautiously) use this incredible tool to connect instantly with your audience.

Events

Face time still matters in building powerful relationships that pay off. As a result, many organizations find that events, from the grandest galas to the most intimate dinner parties, remain excellent fundraising tools, even in the current economic climate. With the right theme, the right draw, and the right audience, some organizations are filling the room and earning in excess of $1 million in one evening. The cost of the ticket, the silent auction, raffles and ad journals also generate significant dollars. Several organizations use their constituents/clients to help generate support and revenue. For example, a private school recently had the students selling balloons at their annual gala. Each balloon cost $1000 and when one was purchased from the students circulating around the room, it was tied to the donor's chair. Soon the room was filled with these gaily colored balloons and everyone wanted to participate. It was a very easy, incredibly inexpensive way to raise additional funds!

As today's nonprofits are continuously seeking new ways, like selling balloons, to grow revenue, they are finding it easier to add a new twist to some of the tried and true events that remain key producers for them. For instance, the yearly black tie gala might be improved by having a famous author speak while also providing a personalized, autographed copy of his/her book for every guest. A golf outing might be spiced up by having a pro available at several of the holes for additional tips for the participants. A tour of a battered women's shelter, a new group home, or a backstage visit at the performing arts center, all conducted with commentary from the executive director, can provide new perspectives and draw critical attention to the organization while also creating a new revenue source.

Each organization needs to decide what type of fundraiser will work best for them, given their available resources. Some of the most common options are:

- Annual galas
- Golf outings
- A series of low cost "fun" events
- Wine tastings
- Seasonal events – like Oktoberfest, etc.
- Private parties in the homes of board members – especially when targeting high net worth donors
- Tours of the organization's facility/center/group home, etc
- Inspirational meetings with constituents who explain how the organization has impacted them

The established goal for all of these is to raise funds, but in each instance, the events also enable the organization to demonstrate their value, build personal relationships and build momentum among their supporters.

For a successful, well attended event, no matter what the venue or the cost, nonprofits need to consider how to cross-pollinate by using all the other marketing communications and branding tools available to them. They can Tweet about a program, include all the details on the website and Facebook page, and send e-blasts to the targeted audience, linking to the website for easy on line registration. Local community calendars are available on line, as well as in local papers, and on local TV and radio programs.

However, as the organization chooses to approach their events, they should strive to create an atmosphere that showcases their mission, their vision, their value proposition and their culture.

Strategic Alliances

In order for an organization to really forge a commanding presence as the nonprofit of choice in its targeted market, it is helpful to establish good working relationships with other key influencers in the same community. In addition to a casual acknowledgment, in some instances it is helpful to create a stronger bond, that is, a more formal alliance, with those who wield influence and power with the organization's base.

By creating strategic alliances with groups and individuals who are leaders in the targeted area, a nonprofit can reach a broader audience with greater credibility. Along with benefiting from the 'halo effect' created by a smart alliance, the organization and its leaders will gain access to a greater critical mass, expanding their own reach by leveraging existing relationships that have been established by others. In fact, these warm introductions can help an organization speed up the process of getting a foothold in a new area in a way that no cold call or direct mail campaign could.

It is a great challenge for any organization working on its own to make a significant impact on a wide spread audience. But in a collaborative atmosphere, when a nonprofit organization builds strategic alliances with others who are also well known, each gains additional credibility. Together they can reach a broader market, help cross sell each other's programs and when feasible co-sponsor or co-host events and programs. In these instances, where a strategic alliance is mutually beneficial, the sum is greater than the whole of its parts as each organization strengthens the other.

Public Relations and the Media

There is one terrific way, *free* way to get some great local or regional coverage, build your status and promote your organization. It is done through media exposure. The influence of the press is formidable, and the best part of being covered in a story, or cited as an expert, is the third party endorsement that comes along with the media quoting your organization as a resource.

Unlike ads, e-mails or direct mail, which provides the organization with a vehicle for promoting itself, when the journalists reference the organization, it has the power of being an independent and objective endorsement.

To get this kind of coverage, an organization should develop some relationships with the local journalists who cover the nonprofit 'beat.' Pitching a story to the local press can help gain positive attention and credibility but the press is even more interested in facts, trends, challenges, new ideas, and news that impacts their readers. When connecting with a reporter, whether for print media, radio or TV, these are some guidelines that will help enhance the interaction:

- Describe a new challenge and demonstrate a solution
- Share critical statistics or cutting edge information
- Make the story local if possible
- Get coverage for successful programs and services
- Offer media interviews on evolving trends, challenges, etc.
- When hosting events, consider inviting the journalists – they will enjoy the opportunity to see the organization in action and network with the audience as well

Annual Reports

Today's donors are more financially savvy than ever before. With the Internet at their disposal, and facts and figures at their fingertips, they expect to know much more about the organizations they support than donors of previous generations ever cared about.

When a nonprofit group takes the time to publish an annual report, it sends a message to the community regarding their professional approach. An annual report not only gives the organization a perfect chance to tell their story and make their case, it is also the appropriate platform for confirming the mission and vision, showcasing the year's triumphs, introducing the leadership and key stakeholders and, as a result of all this, enhancing the organization's reputation as an influence in the community.

This is a tool that works for any size nonprofit entity. Smaller organizations can design attractive, colorful annual reports, complete with photos and graphics, which can be sent as a PDF to their mailing list as well as being posted on the website. This option avoids printing and mailing costs but enables the production of a compelling document that builds credibility and stature for any size nonprofit.

Word of Mouth

At a recent conference of the American Marketing Association (AMA), some interesting facts came to light regarding word of mouth marketing. According to the information at the AMA Nonprofit Conference, word of mouth marketing remains one of the most powerful marketing tools for any nonprofit organization!

Despite all the discussion about e-newsletters, social media, websites and direct mail, people are still twice as likely to trust the advice of friends and family than to trust advertising-type campaigns. This fact is born out by statistics that say 53% of Americans are highly likely to believe the credibility of recommendations from people they know when making a donation or getting involved with an organization.

What does all this mean? Are the tools we just discussed of little value to nonprofits today?

The answer is - not at all. These factoids just serve as further proof of the importance of having a good combination of marketing tactics to draw on. The significance of the range of tactics that help nonprofits build their reputation cannot be overlooked because they add to the organization's credibility and serve as confirmation of a personal referral. Since nearly 40% of word of mouth referrals take place as a result of a discussion that has its impetus in a reference to a news article, a blog, an e-mail blast, or a direct mail campaign, these cannot be ignored. They are indeed integral to the marketing mix, and in addition, they provide an excellent launching pad for a friend or supporter who is promoting the organization.

How to Measure Success

The success of marketing activities is more difficult to measure than the success of a fundraising event, a capital campaign or other donor development activities. In each of those instances, the amount and number of donations are a direct correlation to the effort expended.

Pledges and checks are quantifiable. Unfortunately, the success of a mix of marketing efforts is not as easy to capture. Nonetheless there are benchmarks that can be measured.

For example, an organization can measure the number of hits to its website, and even the hits and time spent on specific pages. It can measure the number of followers on Twitter or friends on Facebook. It can measure the space it garners in the media as a result of great press relations. It can measure the number of people who click on the articles in its monthly newsletter or request extra copies of the annual report.

What cannot be measured is whether or not the success of these initiatives leads directly to new revenue for the organization. As such, the goals have to be realistic. For those involved in marketing, the goals and objectives are not measured in dollars, but in web hits, program attendance, amount of media attention, and increasing name recognition. Instead of building a revenue stream, marketing encourages building a stronger brand.

Ultimately of course, all of the marketing and branding initiatives are expected to lead to revenue for the organization. The difference is that it is not an immediate reaction, but rather it is a steady process that takes place over time as the group uses marketing to demonstrate its value in the community.

Conclusion

Marketing is not something that should be implemented randomly as the mood strikes, nor should it be eliminated when times are tough. Marketing is the most effective way for any nonprofit organization to build loyalty within its targeted audience, opening lines of communication and adding value.

It is critical to consider that the *impression* a nonprofit organization makes and the *experience* people have with it are expressed by everything that represents them, from:

- The look and content of all print and electronic materials
- The quality of the programs/ events
- The attitude of the staff
- The board members who represent the organization
- The alliances they form

In this white paper we have shown that a structured, well-thought out marketing process can help an organization build its brand, resulting in greater ability to *attract and retain* donors, volunteers and clients.

As we conclude this study, we offer the following suggestions to nonprofits of all sizes as they create and fine tune their own marketing strategies:

- Always market strategically; stay laser-focused on your goals

- Bring energy to your marketing

- Be proactive, attentive and responsive to all supporters

- Be a good listener – know what donors, volunteers and clients want

- Leverage your board – they should be your best advocates

- Draw on a mix of tactics to generate loyalty and passion

- Form meaningful alliances and be continuously on the look out for new relationships

- Re-evaluate your marketing tactics frequently and be open to new ideas

If you have any questions, or would like to speak with us regarding your organization's marketing plan, please contact Sally Gick, Principle of the Firm and Chief Growth Strategist, at 973-994-9494 or by e-mail at sally.glick@sobel-cpa.com.

Footnotes and Citations

The following websites and articles were researched and used as support material in writing this white paper.

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www.AssociatedContent.com

How to Guerilla Market Your Non-profit Organization. Mollieanna.
www.eHow.com

Ten Ways to Market Your Nonprofit On Line.
www.newmediacampaigns.com

Eight Basic Steps to Marketing Your Nonprofit Organization. Laura Lake.
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Three Tips for Nonprofit Viral Marketing and Word-of-Mouth Marketing is Perfect for Nonprofits. Joanne Fritz.
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Six Ways Nonprofits Can Use Social Media to Grow. Rich Brooks.
www.Fastcompany.com

Using Social Media to Mobilize Supporters and Resources (Part I). Rosita Cortez. www.rositacortez.com/fundraising

Strategic Social Marketing for Nonprofits. Nedra Kline Weinreich.
www.nonprofit.about.com

The Young are Wired for Social Media: Is Your Nonprofit? Joanne Fritz
www.nonprofit.about.com

Online Marketing Guide for Nonprofits. Joanne Fritz.
www.nonprofit.about.com

Meet the Authors

Bridget Hartnett

Bridget Hartnett, CPA, a member of the Firm at Sobel & Co., has more than thirteen years of experience in public accounting which she draws on to provide high level services for clients.

Experience in the Nonprofit Niche
Bridget spends most of her time working closely with clients in social services and nonprofit areas, including educational institutions. As a member in the firm's Nonprofit and Social Services Group, Bridget supervises the audit engagements conducted by Sobel & Co. for the Cerebral Palsy Association of Middlesex County, the Youth Development Clinic of Newark and Catholic Charities of the Trenton, Metuchen and Newark dioceses, Freedom House, and C.J. Foundation. In addition, she handles all of the firm's education audits and holds a Public School Auditor's license. Bridget is also responsible for reviewing and overseeing the preparation of nonprofit tax returns.

Philanthropic and Social Service Commitment
Bridget carries her commitment to social services beyond the work place to include her personal involvement in several areas, such as at St. Benedict's school in Holmdel where she is always available for volunteering for projects and special events as needed as well as giving her resources and time to various children's charities, such as the New Jersey Chapter of Make-A-Wish and others. She is also a volunteer with professional business groups in the New Jersey community, including Monmouth Ocean County Nonprofit Committee and the Western Monmouth Chamber of Commerce where she helped to found the successful Young Professionals' Group and currently serves as Co-Chair and founder of their newly formed Nonprofit Committee. Bridget is also an active member of the New Jersey CPA Society's Nonprofit Interest Group.

Professional Credentials
As a licensed Certified Public Accountant in New Jersey, Bridget is a member of both the American Institute of Certified Public Accountants (AICPA) and the New Jersey Society of Certified Public Accountants (NJSCPA).

Educational Background
Bridget graduated with her Bachelor of Science degree from Montclair State University.

Ron Matan

Ron Matan, member in charge of Sobel & Co.'s Nonprofit and Social Services Group, brings a unique blend of public accounting and business acumen to every client engagement. A key member of Sobel & Co.'s Leadership Team since joining the firm in 1997, Ron works primarily with non-profit organizations, including United States Department of Housing and Urban Development ("HUD") projects, A-133 engagements, and low income housing tax credit programs ("LIHTC").

Experience in the Nonprofit Niche
As member in charge of the firm's Nonprofit and Social Services Group (A-133 and HUD audits and LIHTC programs), Ron is responsible for the firm-wide quality of this practice area and is the firm liaison for the AICPA's Government (Nonprofit) Audit Quality Center. With over 35 years experience in public and private industry and accounting experience with all types of nonprofit and social service organizations, Ron brings a unique blend of knowledge and insight to these specialized engagements. Ron is a Certified Tax Credit Compliance Professional and is listed in the Guide which is circulated to all State Agencies Allocating Tax Credits as well as the Internal Revenue Service. He has also taken courses in advanced training for peer reviews and performs peer reviews of other accounting firms.

Philanthropic and Social Service Commitment
Ron is a member of the Board of Directors of First Occupational Center where he serves as Treasurer and is a member of the Education Committee for the Mid-Atlantic Chapter of the Society of Association Executives. Ron is a member of both the Plainfield Neighborhood Health Center Board (where he serves as Treasurer) and Union County Educational Services Foundation Board. Ron was the former treasurer and board member of Kids Peace Treatment Centers for emotionally disturbed children, located in Bethlehem, Pennsylvania.

Professional Credentials
Ron is a Certified Public Accountant licensed to practice in New Jersey, New York and Pennsylvania. He is a member of the American Institute of Certified Public Accountants and the New Jersey Society of Certified Public Accountants (NJSCPA). Ron has been elected as Vice-Chairman of the PKF North America's Nonprofit Committee, and in June 2004, Ron was appointed to the New Jersey Society of Certified Public Accountants Peer Review Executive Committee. Ron is also a member of the NJSCPA's Nonprofit Interest Group.

Educational Background
Ron is a graduate of Kings College in Wilkes-Barre, Pennsylvania, where he received a Bachelor of Science Degree in Accounting

About Sobel & Co.

Sobel & Co. is a middle market accounting and consulting firm with headquarters in Livingston, New Jersey that has been providing nonprofit and social service organizations in the New York/New Jersey metropolitan area with audit, accounting, tax and advisory services since its inception in 1956.

The firm is distinctive in its approach to the nonprofit community because of its sincere passion for serving this sector. As it says on the Sobel & Co. website, “We work with the nonprofit sector because we feel good helping those who do good; we have a passion for helping nonprofit organizations achieve their mission of helping the world's most vulnerable.”

The firm currently works with more than 175 nonprofit organizations with revenues ranging from $100,000 to over $60,000,000. Based on this depth of experience, the professionals in the nonprofit group are keenly familiar with the issues facing nonprofits and they will apply this knowledge to bring added value to every engagement.

As a further demonstration of the firm’s commitment to the nonprofit community, several complimentary programs are offered throughout the year. These include quarterly webinars, roundtable discussions and an annual symposium on timely and relevant topics. Newsletters, articles, benchmark reports, surveys and white papers are also distributed to the nonprofit sector to provide them with access to cutting edge information.

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