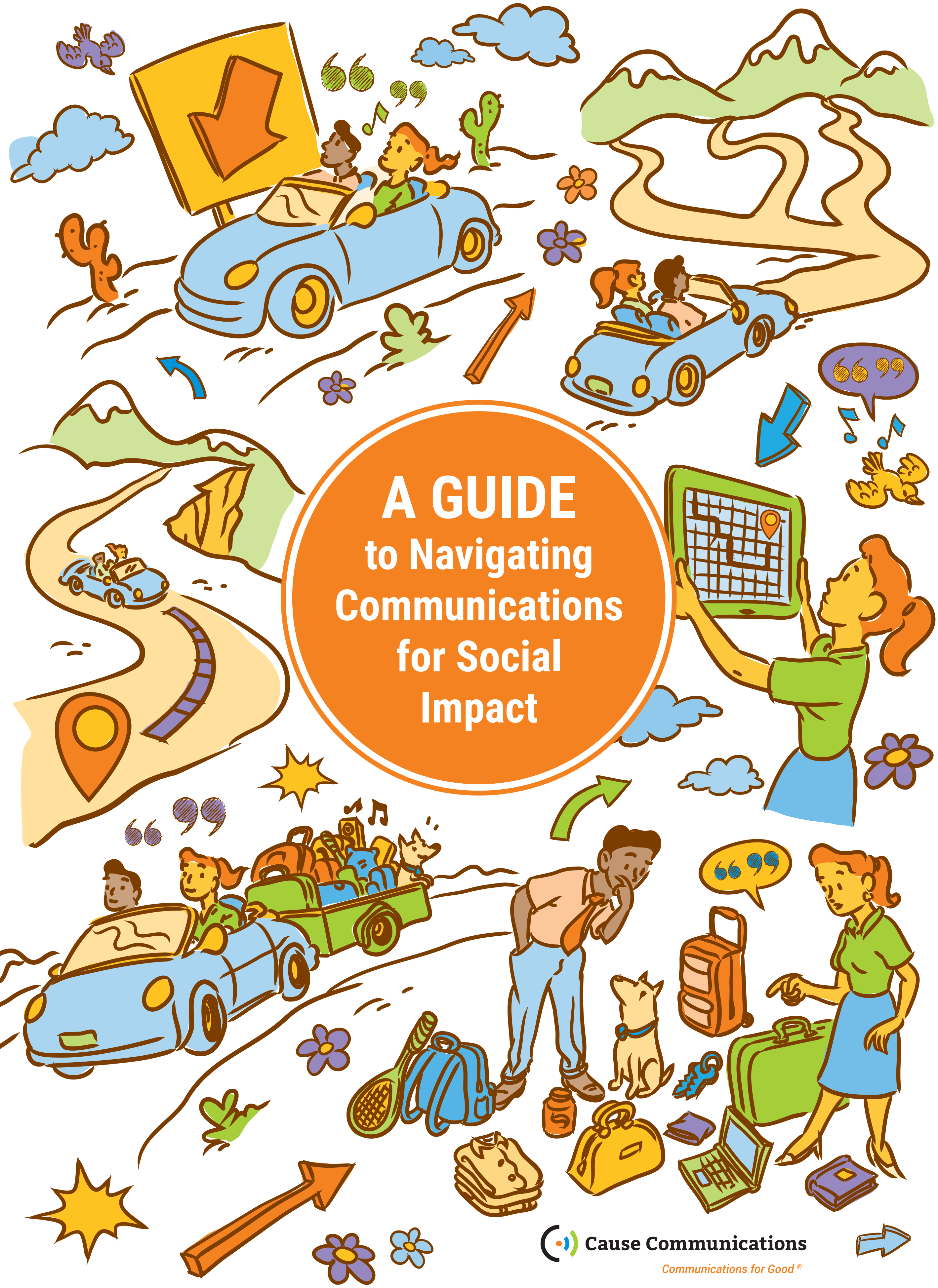
COMMUNICATIONS TOOLKIT



A GUIDE to Navigating Communications for Social Impact

Cause Communications

Communications for Good ®

COMMUNICATIONS TOOLKIT

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R. Christine Hershey & Vanessa Schnaidt

4TH EDITION

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Cause Communications
Cause Communications is dedicated to helping purpose-driven organizations use communications to create positive social change. We strengthen the impact of foundations, nonprofits, socially conscious businesses, and the public sector by providing consulting, tools, and training. For additional information, visit www.causecommunications.org.

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Additionally, we would like to acknowledge the many experts and organizations who share our commitment to building the communications field, whose ideas have helped inform the content of this guide, and whose work changes the world for the better.

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INTRODUCTION

A Toolkit for Today's Communicators

A lot has changed since the first edition of the Toolkit was published in 2002, but the basic principles are more relevant than ever. We still believe in the power of mission-driven organizations to transform our society. And we still believe in the power of well-crafted communications to transform organizations. Effective communications that target the right messages to the right audiences at the right times are needed now more than ever.

At a time when doing more with less has become the "new normal," investments in appropriate, well-planned communications can enhance the bottom line when resources and staffing are tight. Every day, we field calls from mission-driven organizations with questions about communications that are as varied as the organizations themselves. What they all have in common, though, is the need to find the most successful ways of raising awareness and raising funds—fast.

This Toolkit was created to fill a need. While there are many books, digital libraries, workshops, and presentations on individual aspects of communications for social impact, few resources succinctly cover the broad spectrum of communications needs for this field.

To determine the content of the Toolkit, we conducted national qualitative and quantitative surveys with small, medium, and large organizations, leaving us with a snapshot of what communicators need today and how those needs have changed over time. The result is a book whose content is directed by the people it was intended to serve.

This book is developed as a guide to help you find the best approaches, messages, and vehicles for reaching all of your key audiences. It is not meant to be a textbook or a definitive source on any one topic, but rather an overview of what you, as a social impact leader, need to know to navigate your way through the myriad of communications approaches—from branding your organization and developing your communications plan, to choosing the right tactics and measuring your results.

First published in 2002 and now in its 4th edition, this book has undergone a major revision to reflect the latest strategies, trends, and opportunities, both in the field of communications and in the field of social impact more broadly.

Communications is often the linchpin of social change.

We've borrowed ideas from other fields, incorporating best practices from both small business and the corporate world. We know from experience that a balance of tried-and-true and fresh approaches can help organizations achieve even greater results.

We also received invaluable assistance from the philanthropic community. Throughout the entire process, we have found them to be supportive, receptive, and eager to bring this type of resource to you. Specifically, we would like to thank the California Wellness Foundation, Conrad N. Hilton Foundation, Joseph Drown Foundation, and The California Endowment for their support, wise counsel, and encouragement.

Why Communications and Why Now?

In today's nonstop communications environment, it's become more challenging than ever to get your messages seen and heard by key audiences. And yet, communications is often the linchpin of social change. Harnessed effectively, strategic communications has the power to clarify issues, shift attitudes, raise much-needed funds, and even bridge partisan debates.

Mission-driven organizations typically have two main goals for their communications programs: raising funds and raising awareness, the latter often with the purpose of shifting attitudes, behavior, or policy. Yet getting your messages heard and moving people to act have never been more challenging, or more important.

Every day, consumers are bombarded with as many as 10,000 brand messages, through advertising, the news media, and online. With all that information clutter and "noise," how do you make your organization stand out?

In the business world, not being visible often means going out of business. And more organizations are coming to understand that the same is true in the social impact space. If donors don't feel a connection to your cause, or if those you are trying to help aren't clear what services you provide, your organization's survival can be at risk.

"In a crowded marketplace…not standing out is the same as being invisible," says marketing guru Seth Godin in his book *Purple Cow: Transform Your Business by Being Remarkable*. Today, mission-driven organizations face increased scrutiny from government agencies, funders, and the public regarding their governance and financial standards—not to mention increased expectations to demonstrate impact. Proactive communications strategies can stave off potential crises while positioning an organization as a worthy recipient of support and of the public's trust.

To get your messages heard, understood, and remembered, you need to develop strategies that sit at the intersection of your organization's goals and your audiences' needs.

Communications as a Core Competency

Communications is key to running a mission-driven organization, especially when everyone is doing more with less. Good messaging and information sharing strengthen internal capacity, promote programs to the community, and (probably most important) contribute to having a strong and sustainable funding base.

Having a dedicated communications person on hand is still a luxury at many organizations, which is tough when the way we interact with information and with each other has changed. We live in a new digital environment where everyone can engage, participate, and become a communicator to almost any audience. Most of us now use multiple platforms—sometimes printed materials, sometimes Twitter, sometimes Facebook, sometimes in-person meetings (and sometimes all at the same time!)—to communicate with our networks of professional colleagues, constituents, and friends. As a result, conversations about the issues that are most important to us begin at all levels of organizations and in neighborhoods, homes, schools, or public forums.

The good news is that communications is no longer a person or even a department, it's a practice. Your organization can effectively use communications to drive strategy and meet your goals with limited staff simply by assigning clear roles and responsibilities and by calling on outside networks of volunteers, partners, and donors to step up as ambassadors.

Although there may be a role for everyone to play, the buck still has to stop somewhere. In any project, someone still needs to make sure that staff and partners are working together in support of a common goal and conveying a message that stays true to your mission and brand identity.

When we set out to update our Communications Toolkit, we took a step back and thought about how organizations of all sizes, budgets, and experience levels could learn to use who they have on hand to be effective. As a result, we've refreshed our suite of tools and worksheets that demonstrate how communications strategy can be integrated into a variety of scenarios; how to engage staff across your organization in everything from planning a strategy to tracking results; and how to make sure you're staying focused on your goals every step of the way.

There are plenty of opportunities to join the conversation and help us make this communications community stronger, faster. Ask our experts a question, comment on a blog post, follow us and share our resources on social media, and recommend a resource that you think we should highlight. We're here to listen as much as we are to share.

Defining Communications

If you search Google for "communications," you get everything from telecommunications to couples counseling. If you look in the dictionary, you'll find several definitions, including "the art and technique of using words effectively to impart information or ideas" (*American Heritage Dictionary of the English Language: Fifth Edition,* 2019). That's close. But the truth is that everything you do—or don't do—communicates a message to your audience, whether it's those you serve, your volunteers, donors, staff, the media, or the government.

JUST DO IT!

—Nike corporate slogan

While an occasional disinclination to exercise is exhibited by all age cohorts, the likelihood of positive health outcomes makes even mildly strenuous physical activity all the more imperative.

—Nike slogan, if written by a nonprofit executive

Source: Andy Goodman, "free-range thinking" newsletter

Your Communications Journey

Using the theme of a road trip, we've organized this toolkit into the steps and strategies any traveler might take to ensure the journey is safe, is fun, and ends at the desired destination. We start off in Chapter One with assessing where you are today. Having a clear sense of the starting line helps you understand where you need to go, so we've included numerous tips for conducting relevant and useful research—about your own organization and the world around you.

Chapter Two explores how to define that destination by setting up specific communications goals. We also break down the components you'll need to map out your route—from creating a strategic communications plan to making sure your brand and messaging are ready to support those efforts.

Chapter Three takes a closer look at how you make this communications journey possible. We cover budgeting, collaborating with external partners, locating funding, and getting your board to support an investment in your communications efforts.

Chapter Four is devoted to all the tools you'll want to take with you on the trip. This chapter is about tactics, with an emphasis on digital communications and how best to leverage these new approaches for the greatest impact.

Chapter Five helps you determine whether you've reached your desired destination. We go over the importance of tracking progress and building out a practice of measurement and evaluation. The strategies discussed here are designed to illuminate—and articulate—your impact. Equally important, we offer tips for knowing when and how to adjust course when surprises and successes appear along the way.

How to Use This Book

This book covers a diverse range of communications vehicles for mission-driven organizations. Most organizations will use some, but not all, of the tools described in these pages. For some, funding communications is a low priority, not by choice, but by necessity. We've therefore included tips for organizations on a shoestring budget.

As we've said, this book does not pretend to be all you need to know on any one subject, but rather is an overview of tips, tools, and resources. We hope the book serves as a quick reference guide for any communications project that comes your way. Throughout the book, you will find:

Colorful half-page inserts—Highlights including "dos and don'ts" and "best of" tips.

"By the Numbers"—Statistics indicating what we have heard through our own research, and from other respected sources in the field.

"Roadside Assistance"—Lists featuring additional resources so you can find more material on a section's topic. When curating these lists, we did our best to select content that is "evergreen" and reflects best practices from mission-driven organizations and experts in the field.

"Accelerate Your Learning"—Call-outs that highlight another related resource we've developed on a specific topic.

"Get Started"—A collection of accompanying resources available online at causecommunications.org/toolkit. These are actual samples, templates, and worksheets you are free to use and share.

It is our hope that this toolkit will serve as a helpful resource, one that you will refer to often.

We can't wait to hear your thoughts. We plan to update the content regularly and add more resources to our collection, so your feedback will help us ensure that our efforts continue to reflect the most current communications needs of the field. Please forward your comments to toolkit@causecomm.org.

CHAPTER 1

Where Are You Now?

In order to know where your organization should go, you need to know where you are right now. Research takes the guesswork out of your communications program. It gives you concrete evidence of how your organization is perceived, including whether the perceptions of those inside match those of your key audiences.

Is your organization known for what you think you're best known for? Are your materials highly valued and read? Is your website easy to navigate? Do your fundraising appeals include an effective call to action? Research will help you answer these questions and give you the evidence you need to allocate your limited communications budgets wisely.

In this chapter, we'll cover a variety of research strategies and tools and how to use them effectively in planning and evaluating your communications efforts.

So let's get started!

RESEARCH BASICS

Mission-driven organizations often shy away from conducting research out of concern that it will be too costly or complicated. But it doesn't have to be.

Why Is Research So Important?

Above all, research makes the case for the direction you're going. Research is critical for confirming or debunking the assumptions you make about your audiences and understanding what they think of you. It is also crucial in establishing a baseline for measuring the success of your efforts and in reducing the risk of lost time and money. And research often yields unexpected results, even happy surprises—like learning that your donors would prefer to receive an electronic version of your expensive printed annual report!

There are two basic types of research: primary and secondary.

Primary research is information you gather yourself or commission through an outside firm. It can be as simple as asking questions of your target audience via phone, email, direct mail, or in person, and then listening to the feedback (see Research on a Shoestring for a few cost-saving strategies).

Secondary research uses existing information already published in print, online, or through external sources such as the media, libraries, universities, trade associations, and government agencies.

Primary research is invaluable for testing materials and messages. Surveying your audience, or conducting focus groups, can help you make any necessary modifications before you invest significant funds in printing an expensive direct-mail solicitation or launching a new website. Pros of secondary research are that it's free, it's available everywhere, and it's often great for putting your own activities in the broader context of your community or issue-area. Cons are that it may not be exactly what you're looking for and it can be time-intensive to find sources.

The first step in any research process is to identify a few clear goals. What are you trying to uncover or hoping to learn? The answers will not only keep you focused, but also help you determine which research methods and tools are best suited for gathering answers.

Accelerate Your Learning GO

Take our **Communications Effectiveness Quiz**—an online self-assessment tool with filtering options so you can compare your results to others (causecommunications.org/tools).

By the Numbers

61% of you rarely or never conduct audience research.

Qualitative vs. Quantitative Research

Qualitative research allows people to share emotions, explain their thoughts, confirm areas of concern, and uncover topics the organization may not know are hot-button issues. Qualitative techniques include focus groups (both in-person and online), and one-on-one meetings or interviews by phone.

By their nature, qualitative interviews are information rich and time intensive. Remember, the information provided by qualitative research, while valuable, is more anecdotal than scientific, particularly when sample sizes are small.

Quantitative research generally is used for larger groups and it measures, in numeric terms, what people think. Typical quantitative research techniques include surveys (online and offline), using the telephone, a website, or the mail.

Quantitative interviews contain uniform questions, with uniform responses, that enable a researcher to easily capture and tabulate results. Depending on the number of people you survey, quantitative surveys provide a specific level of statistical accuracy. This type of research can confirm or refute findings uncovered through qualitative research.

Research on a Shoestring

Here are a few low-cost ideas for conducting your own primary research:

Gather a dozen of your most important constituents for an informal focus group for input on your organization's new messages. This can also be a great way to build buy-in among key audiences for your communications efforts.

Do a quick online survey with a few of your key audiences. There are several online survey companies that are either free or cost effective. Feel like going old school? For less than $75 in stamps and stationery, you can send a survey to 100 people asking for their feedback.

Invest a few hours of staff time to call a targeted group of audience members. Conduct a phone survey about your organization and communications efforts.

Match your information-gathering methods with your audience. Major donors might receive a personal call while volunteers are asked to fill out an online survey.

Convince a donor to underwrite a major quantitative research survey.

Four Steps in the Survey Process

1. Identify your target audience(s)
2. Develop the questionnaire
3. Conduct the survey
4. Analyze the information

Roadside Assistance

Focus Groups: A Practical Guide for Applied Research, Richard A. Krueger and Mary Anne Casey, 2014

The Ultimate Guide to Customer Feedback, SurveyMonkey

Research Design, John W. Creswell and J. David Creswell, 2018

Strategic Market Research, Anne E. Beall, PhD, 2019

RESEARCH TOOLS

Research is the most effective way to look at where you've been, find out where you should go, and determine how to get there.

Survey Basics

You may want to conduct surveys for a wide variety of purposes, from the comprehensive communications audit, which provides feedback on the effectiveness of your entire communications program, to questionnaires about specific communications vehicles or issues.

Conversations by phone or in person are often the most efficient way to gather information from a cross-section of your stakeholders (e.g., a board member, a volunteer, a staff member, a foundation funder, a major donor, and a recipient of your services).

Online surveys are a great complement to stakeholder interviews and/or in-person focus groups. Online surveys are best suited for larger groups in your audiences and can provide reliable quantitative data—often at little to no cost.

No matter what tools you use, spend some time and thought on developing your questionnaire. The quality of the questionnaire is key to the success of your effort, whether it's a comprehensive communications audit, a survey about your newsletter, or a focus group review of your new graphic identity program (e.g., a new organizational logo, colors, letterhead system, etc.). Consider testing the questions on a small group to surface potential problems before you poll your full audience.

Public opinion polls offer another research tool and can help you understand public attitudes around a particular issue. They're especially useful if you're trying to shape public debate or raise the profile of your issue with policymakers. Unlike surveys and focus groups you might conduct with people you know or select, public opinion polls are quantitative research studies that involve a random sample of people. Do some research to see if any polling data already exists about your organization's cause. This can help you determine if you need to conduct additional polling—for example, to get newer data or gather more relevant information for a specific initiative at your organization.

Focus Groups

Focus groups can be effective tools for testing new materials, messaging, logos, taglines, and various donor appeals. Focus groups also can be beneficial at the early stages of quantitative survey development to help uncover appropriate areas for questioning.

- A focus group allows you to test your materials with a small number of carefully selected individuals who share their opinions in a roundtable discussion.
- The ideal size of a focus group is 6 to 12 individuals.
- As a general rule, members of a particular focus group should have a common frame of reference to encourage the free exchange of ideas. You may want to conduct separate focus groups with, for instance, donors, volunteers, staff, and those you serve.
- The skill of the moderator is essential in eliciting helpful information and ensuring that all voices at the table are heard. Tactfully turning the conversation away from those who dominate and toward those who are more reserved is key to a successful focus group.
- Questions should be open-ended.
- When recruiting people for your focus group, think about where your audience already gathers instead of making them come to you.
- Consider offering an incentive for participants.
- Conducting a focus group allows you to gather a significant amount of information in a short amount of time.
- While you should try to get a representative sample of your target audience in a focus group, remember that the information gathered is qualitative, and can’t be generalized to the public at large in the way that quantitative information can.
- Focus groups provide more in-depth information than a quantitative survey does (fewer “yes/no” responses).

Best Practices for Online Surveys

Follow these tips, which are adapted from SurveyMonkey.com, to make the most of your online surveys.

Identify a clear, realistic goal for your survey—A goal will help you prioritize which questions to ask. For example, you could design a survey for the purpose of better understanding your organization's reputation.

Keep it short—Surveys that respect the time of respondents will garner a higher completion rate and more thoughtful answers.

Use closed-ended questions—Questions that use pre-populated answer choices (multiple choice, checkboxes) are easier for respondents to answer and provide you with quantitative data. Open-ended or free-response questions are most effective if you only include a few.

Remain objective—Try not to ask leading questions by putting your own opinion into the prompt, and make sure you offer a balanced set of answer choices.

Streamline what you're asking—Avoid "double-barreled" questions that ask for feedback on two separate things within a single question.

Preview your survey—Always preview how your survey will look to your audiences. Send a test message or share it with others to catch any mistakes before you send it out.

Make it mobile friendly—Consider the full range of devices respondents will be using to participate in your survey, and make sure the format is easy and accessible across all of them.

Explain why it matters—When introducing your survey, frame the purpose in the context of what's important to your audiences. Will their feedback lead to a greater impact on your cause? A better user experience for them?

Set a clear deadline—Tell your audiences how long the survey will be open and send a reminder to anyone who hasn't responded a day or two before it closes. A deadline provides a sense of urgency that often prompts more responses.

Follow up—Close the loop with your respondents to say thank you. Where appropriate, share how your organization is moving forward as a result of the survey findings.

By the Numbers

Content analysis and interviews are the most common methods used by organizations to assess their communications efforts.

Communications Audits

Communications audits provide a thorough analysis of your organization’s internal and external communications and let you know where you stand in relation to your peer organizations. An audit can help you learn if your messages are getting through to, and resonating with, your key audiences, and it can also help you identify the most effective communications vehicles to address any gaps. Ask the right questions of the right audiences and use the information to inform your communications plan.

Audits are generally more effective if conducted by an outsider. Consultants can be more objective than longtime staff, and participants often are more comfortable speaking freely with someone not employed by the organization. Conduct audits whenever there is a major change in your organization, such as a new CEO, major partnership change, or crisis.

Sample Audit Questions

Audit questions should be tailored for each audience you are interviewing. Following are some ideas to get you started:

What do you think is most unique about the ABC organization?

Where do you usually first hear or see information about ABC?

Are you happy with how information is communicated to you from ABC?

What comes to mind when you think of ABC?

What sense do you have of ABC's reputation in the community?

What is ABC best known for?

For you, what is the most compelling reason to support ABC?

Do you have any reasons for not wanting to support ABC?

Do ABC's advertising and communications stand out from others?

Are ABC's products and services clearly identifiable?

Are you familiar with ABC's current marketing campaign?

What do you think about it?

Are there other issues regarding ABC and its plans that you would like to raise?

"Your audience gives you everything you NEED. They tell you. There is no director who can direct you like an audience."

—Fanny Brice, comedian

Even the Scales

When you ask an audience to rate a project or program, use a scale with an even number of choices. For instance, if you use a scale of 1–5 you will tend to get an abundance of 3s. But if you ask people to rate on a scale of 1–4 you'll get a better idea of their real opinions, since no "neutral" choice is available.

Roadside Assistance

Qualitative Measures, Web Center for Social Research Methods

Assessing Organizational Communication: Strategic Communication Audits, Cal W. Downs and Allyson D. Adrian, 2012

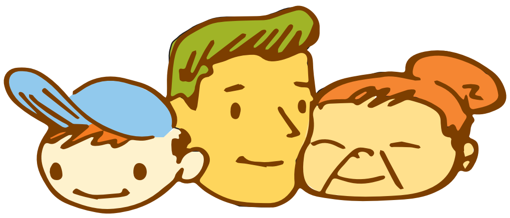
Public Opinion Polls, Constitutional Rights Foundation

Roper Center for Public Opinion Research

Resource Library, Public Relations Society of America

COMPETITIVE ANALYSIS

Competitive analysis helps determine who your peer institutions are, how they are perceived, where they are headed, what audiences they serve and, most important, what distinguishes your organization from theirs.



Get Started

Apply our **Competitive Analysis Template** to get a better view of where you stand. Find a **Sample SWOT Analysis Form** at causecommunications.org/toolkit.

Know the Landscape

Once you have a clear understanding of the perception your constituents have of your organization, you also need to know where you stand in relation to other organizations with whom you vie for media attention, policymaker attention, or donor and volunteer support.

Management guru Tom Peters boils it down to two simple questions: who are you and why are you here?

A big part of the “who are you” question is determining what makes you unique. What do you do that no one else can do? One of the best ways to answer that crucial question is to look at how you compare with institutions that serve the same core constituency. The “why are you here” question refers to having a clear, focused mission that resonates with your audiences.

Your approach can be formal, with a team of consultants conducting extensive quantitative research in order to perform a full SWOT (Strengths, Weaknesses, Opportunities, Threats) analysis and building a library of samples from your peer institutions that you can compare side by side with your own.

Or you can take the informal, bare-bones route by gathering all the materials you can get your hands on, researching other organizations online, and making a few phone calls to conduct a quick survey. Either way, competitive analysis is crucial to building a strong identity for your organization.

What Makes You Unique?

Tom Peters is the co-author of the classic *In Search of Excellence* and many subsequent business books. Try his exercise to determine how you differ from your peers:

Who are you? (First state it in one page, then hone down to 25 words)

List three ways in which you are unique to your constituents.

For each peer institution, who are they? (Identify in 25 words)

List three distinct you/them differences.

Try results on your teammates. (Does it sound right? Who or what is missing?)

Try them on a friend.

Try them on a skeptic.

Sources and Trends

Check out the following sources for free research and analyses, including a variety of annual trends reports. These resources can help you learn about what your peers are doing, understand where the field is headed, and put your own organization in context.

Nonprofits & Philanthropy

boardsource.org—dedicated to strengthening nonprofit governance and leadership, including boards of directors

candid.org--data and resources about foundations and nonprofits (formerly Foundation Center and GuideStar)

charitynavigator.org—America's largest independent evaluator of charities; offers a variety of top-10 lists and facts about the nonprofit sector

comnetwork.org—membership organization of foundation and nonprofit communications professionals; offers capacity-building resources

idealist.org—best known for its comprehensive job board for nonprofit jobs and volunteer opportunities

irs.gov/charities-non-profits—tax information for charities and other nonprofits

issuelab.org—free research from social sector organizations around the world

mrbenchmarks.com—online metrics for nonprofits, featuring trend data about online fundraising, advocacy, and marketing

nonprofitmarketingguide.com—offers an annual trends report on nonprofit communications

npresearch.org/—studies and summaries about the nonprofit sector, with an emphasis on fundraising

nten.com—membership organization of nonprofit technology professionals; offers educational courses and capacity-building resources

philanthropy.com—*The Chronicle of Philanthropy* covers trends and news in the social sector

techsoup.org—offers technology information and case studies aimed at nonprofits; also connects nonprofits with donated and discounted technology products

General Research

census.gov—offers a broad array of data sets and the ability to tailor your search by state or zip code

usa.gov/statistics—portal for locating government statistics

marketresearch.com—comprehensive collection of published market research

pewresearch.org—nonpartisan "fact tank" for data-driven social science research on issues, attitudes, and trends

University libraries and research centers—an often overlooked but invaluable source of free research

By the Numbers

17% of organizations conduct market research at least once a year.
(*Marketing in Non-Profit Organizations: An International Perspective*; University of Wollongong Research Online)

What You Should Know About Your Peers

What are their goals?

Who are their constituents?

What are their key messages?

How are they perceived?

What works for them and what doesn't?

Roadside Assistance

Purple Cow, Seth Godin, 2009

Defining Your Competitive Advantage, Mollie West and Andy Posner, 2013

Great by Choice, Jim Collins and Morten T. Hansen, 2011

The Little Big Things, Thomas J. Peters, 2012

On Competition, Michael E. Porter, 2008

Top Tips

1. Know your audiences and continuously seek their feedback.
2. Conduct communications audits of your internal and external communications periodically.
3. Test your materials and messages before you unveil them publicly.
4. Know your peer institutions as well as you know your own organization.

CHAPTER
2

Where Do You Want to Go?

If you know where you are going and what you hope to accomplish for your organization through your communications efforts, it becomes much easier to plan the best route. Your starting point should be knowing your destination. Consider what success will look like and then work backward to develop a map to get you there.

How do you want your target audience to perceive your organization?

What actions do you want them to take?

In this chapter, we'll show you how to develop a communications plan, how to create a strong brand and visual identity for your organization, and how to develop and frame key messages to drive it all home.

Next stop: Your communications plan

STRATEGIC COMMUNICATIONS PLANS

A communications plan, which can be annual in its scope or specific to a campaign or initiative, provides you with a road map so you can stay focused, strategic, and proactive.

Why Plan?

Your organization's mission and the research you've conducted are the starting points for developing a strategic communications plan. A solid plan will help ensure you're ready to take advantage of unexpected opportunities and deftly navigate crisis situations. Your plan should be the communications blueprint for your organization's overall strategic business plan. It should complement your organization's strategic plan and amplify its goals in a way that can help you achieve your organizational objectives.

In writing your communications plan, try to avoid generic goals such as "raise awareness" or "increase media coverage." Be specific, and begin with clear, realistic goals. Which audiences do you want to make aware of your organization—community leaders, those you want to serve, prospective donors, policymakers? Even if it's all of the above, you must develop strategies to effectively reach each target group.

What actions do you want each of your audiences to take? Your goals must be measurable. If you run a theater company and your goal is to boost attendance, state how many people you want to attract. If you want more media coverage, identify the number and quality of placements (e.g., one placement each month in major national media).

Accelerate Your Learning GO

Before getting too far along with your communications plan, make sure you're headed in the right direction with our **Identifying Your Audiences** Bite-Size Course (causecommunications.org/tools).

Get Started

Use our **Communications Plan Outline** at causecommunications.org/toolkit.

Determining Strategies and Tactics

Next, map out the strategies (approaches) and tactics (activities) that will help you reach your communications goals. This section of your plan explains how you'll engage with your audiences. At the strategy level, you might determine the best way to elevate your organization's profile is through a media relations campaign or thought leadership initiative. At the tactical level, you can identify specific tools or communications vehicles you'll use to carry out each strategy (e.g., op-eds, speaking engagements, or a press release). Try brainstorming a few strategies for every communications goal you set, and at least two tactics to support every strategy. By "laddering" the goals, strategies, and tactics in this way, your efforts will support and strengthen each other.

Once you've identified the activities you'll need to reach your goals, consider whether your action plan is realistic given your capacity and budget. It may be necessary to go back and make adjustments to what can happen when. Prioritize to set yourself up for success.

By the Numbers

95% of you state that communications is important to advancing the mission of your organization, while less than half have a documented communications plan in place.

Tips for Your Communications Plan

1. Link communications plan to your strategic mission
2. Avoid generic goals—be specific
3. Map out strategies and tactics
4. Prioritize your activities
5. Be prepared for success

The indispensable first step to getting the things you want out of life is this: DECIDE what you want.

—Ben Stein, author and comedian

Elements of a Communications Plan

Summary/overview of plan

Goals/objectives

Target audiences

Key messages

Strategies (approaches)

Tactics (activities)

Budget

Implementation plan

Measurement and evaluation

BE SURE YOU HAVE:

A clear tie to your organization's strategic goals

Specificity about target audience and desired response

Flexibility to respond to external changes

Tying Your Plan to Your Mission

Since your primary goal is fulfilling your organization's mission, your communications plan should be closely tied to your organizational goals. Need a shortcut to mission alignment? Look no further than your organization's strategic plan.

If you already have a strategic or business plan in place, then your communications goals should take a direct cue from these broader organizational objectives. Think about how strategic communications can help you reach key milestones or accelerate progress toward each facet of the plan. And once you have a draft of your communications plan in place, go back to the strategic plan and double-check that the priorities are aligned.

For example, if your organization's mission is to cure heart disease and your strategic plan includes funding new research projects to achieve medical breakthroughs, then your communications efforts would probably include an outreach campaign to the medical community to attract innovative proposals.

A mission-aligned plan helps ensure you have a sound road map for communications activities, and the benefits don't stop there. Using your communications plan to demonstrate how your activities directly support your broader organizational priorities will also go a long way in helping senior leaders understand and respect communications as a valuable investment.

Targeting Your Audiences

What groups make up the elusive species that are your audiences? You track donations by campaign, you survey at events, you even have good digital metrics. But do you really know what moves them? What drives them to action? Are you reaching each audience—clients, supporters, partners, influencers, staff—in the most effective way?

You'll want to break down the diverse audience you aim to reach into several distinct groups. (Advertisers call this market segmentation.) Then for each segment of your audience, you'll want to tailor the way you communicate with them. The more your messages reflect what's important to each audience, the more effective you'll be in attracting them to your cause.

Personas can be the best way to elicit engagement and lay the groundwork for ongoing, deeper relationships. Once you've identified who your audiences are (demographics) and how they interact with you (communications channels), create a character that represents each group. Name them. Identify their likes and dislikes, how they view the world. Then craft your messages accordingly. When you can envision a real person, you'll find your communications are more personal and get better results. You'll deliver value over time and keep them coming back.

Tips for Developing Personas

1. List the groups of people you want to engage
2. Choose your top three groups and write down descriptive characteristics
3. Use the descriptions to create a "persona" or representative person for each key audience
4. Add a picture to complete the persona

Roadside Assistance

The Smart Chart, Spitfire Strategies

Strategic Communications for Nonprofit Organizations, Sally J. Patterson and Janel M. Radtke, 2009

Personas, Content Marketing Institute

BRANDING

At its essence, branding is about establishing meaningful relationships with your audience and building trust in your organization.

Your Brand: Your Most Important Asset

Whether you know it or not, your organization already has a brand identity. It's everything the world sees and hears about you—how the phones are answered, how staff present themselves, how your materials look, how your website works. And, more important, it's how your audiences perceive your organization based on all those factors and then some.

"Anyone who wants to build a great brand first has to understand who they are," says Scott Bedbury, who ran brand-building campaigns for Nike and Starbucks and co-authored *A New Brand World*. "The real starting point is to go out to consumers and find out what they like or dislike about the brand and what they associate as the very core of the brand concept."

When you clarify and communicate what you stand for inside your organization, you not only instill a sense of pride but also offer a motivational tool for your staff and volunteers to live the promise in their day-to-day work. And when all levels of your staff are dedicated to fulfilling the brand promise, your key audiences can't help but notice.

Remember, you already have a brand. Proactively managing it helps distinguish you from other organizations, brings consistency and focus to all your communications and services, and builds trust and support among your stakeholders.

> **A brand is a living entity, and it is enriched or undermined cumulatively over time, the product of a thousand small gestures.**
>
> *—Michael Eisner, Disney CEO*

Evaluating Your Brand

It's important to periodically re-evaluate your brand's strengths and weaknesses. Knowing how to effectively evaluate your brand can mean the difference between standing out in your field and being lost in the shuffle of organizations doing similar work. A strong brand makes your cause easily recognizable and helps people understand who you are and what you do.

Three essential steps for evaluating your brand:

Ask yourself how you're doing. Does your brand help advance your mission? What elements of your brand needs work? In a team setting, reflect honestly on your brand's strengths and weaknesses (internal factors) and identify your opportunities and threats (external factors).

Ask others what they think. Survey your opinion leaders, including stakeholders, partners, donors, and board members. Use questionnaires, focus groups, individual interviews, or a combination to get a wide range of insights about your brand and reputation.

Find out what your competitors are doing. Do a little research: Who are the others in your space? How do they describe themselves? How are you similar and how are you different? What are they doing right with their branding and messaging? What makes your brand unique?

By the Numbers

64% of consumers say that shared values create a trusted relationship with a brand. (Source: 10 Marketing, Web Design and Branding Statistics to Help You Prioritize Business Growth Initiatives, Forbes.com)

Social media tools not only offer a great way of sending messages to your constituents, they allow you to pose questions to them. You can become the "moderator" of an ongoing focus group where you ask your contacts what they think of your organization, your work, and your brand.

Brand Components: Values, Positioning, and Tone

Strong brands are grounded by a clear articulation of what you stand for and how that gets expressed. These foundational elements guide all other aspects of the brand and can help you make decisions about whether certain words, colors, and images are aligned with your identity.

What principles do you believe in? What philosophies guide your work? These are your organization's values. Are you collaborative? Forward thinking? Inclusive? Trusted? Values help define who you are as an organization.

Establish what you want to be known for in the world. Often called your value proposition or brand position, this is your organization staking its claim. The Girl Scouts' positioning statement, for example, is that the organization is the "largest nonprofit organization proven to prepare girls for a lifetime of leadership."

Together, your values and positioning shape how you bring your brand to life. Think of your brand as a person. What kind of personality does it have? Compassionate? Hopeful? Friendly? Tenacious? These traits can be translated into the tone of voice you use in your materials, the types of words and phrases you use to engage audiences, and the design style and visuals you use—including color palette, typography, textures, and photographs.

In this way, you're turning the intangible essences of your brand into a vocabulary and library that is concrete, cohesive, and consistent. Continue reading for tips on how to formalize these in a style guide for your organization.

Accelerate Your Learning GO

To look under the hood of your brand, see our Bite Size Course, **How to Evaluate Your Brand** (causecommunications.org/tools).

Essentials for a Strong Brand Identity

- Agreement among your board and senior leadership about the importance of developing and maintaining a consistent brand
- Sufficient allocation of resources—time, talent, and money—toward building your organization's brand
- Relevance of your brand to the audiences you want to reach
- Consistency in your messages
- Consistency in your materials
- Consistency in how employees and volunteers at all levels portray your organization
- Consistent follow-through on your organization's promises, direct and implied, to all of your key audiences
- Ongoing measurement of whether you are increasing the value of your brand in the eyes of your constituents

The Difference Between a Brand and a Logo

Your graphic identity system—your logo and other visuals—reinforces your brand. It is not the brand. The brand is much larger than that. It is the essence of your organization, the promises you make to your most important audiences, and the relationships you build with your constituents.

Roadside Assistance

Brand Aid, Brad VanAuken, 2014

Building a Story Brand, Donald Miller, 2017

The Brand IDEA, Nathalie Laidler-Kylander and Julia Shepard Stenzel, 2013

VISUAL IDENTITY

One of the most important ways you differentiate yourself is through your organization's visual identity.

Looking and Sounding Good

Visual identity is a crucial—and memorable—component of a strong brand. It's the images and words that identify you as you. It's the Nike swoosh, the bouncing lamp of the Pixar intro, and the bright red of Coke. It should be distinctive, memorable, consistent, and true to who you are as an organization.

Your identity starts with the name of your organization. Your name is the first thing most people will learn about you, and it should reflect your mission. Good examples are Feeding America, a national antihunger advocacy group, and Doctors Without Borders. Your name should capture the essence of who you are and have a direct connection to your mission.

Two important elements of your visual identity are your logo (aka "mark") and the typeface that represents your organization's name. Are they unique and memorable? Are they consistently used in relationship to one another? And are they simple and adaptable to multiple uses? Your visual identity must work across all your communications vehicles—everything from invitations and signage to print materials and websites. Logos also need to be reproducible at very small sizes (think business cards). Strong and simple graphics help.

Color, secondary typefaces, and paper stock are other critical components of your identity and need to be used consistently in all materials. Remember, your identity will only be effective if it's used consistently and repeatedly.

It's always helpful to test your identity with sample audiences to help you refine your approach. If your budget permits, conduct professionally administered focus groups with each of your key audiences. Even if you just host an informal gathering of your volunteers or constituents to react to your potential logos and taglines, the information you gather can be extremely valuable. No matter what method you use, you'll be surprised at what you will learn by testing your identity.

Great Logos

These logos easily pass the test.

Logo Test Questions

Ask the following questions to test how your logo will work in the real world:

- Does it translate well in both digital and print environments?
- Does it reproduce well, even at small sizes?
- Does it work in black and white? You won't always reproduce your logo in color.
- Does your logo require white space around it? That empty field around your logo can be as important as the logo itself.

Creating a Style Guide

Your messages and communications vehicles should all work together harmoniously to convey a consistent message about your organization. Everyone in your organization should know exactly how to use your logo, colors, and other components of your visual identity.

Include templates, standards, and visual/textual style guides to ensure consistency. And make these resources accessible online so that staff members are not tempted to recreate your logo from scratch if they're in a hurry.

A style guide or identity manual does not need to be lengthy, but it should include the following:

- Your organizational values and brand positioning statement
- Guidelines for the use of your organization's logo and graphic identity system
- Primary and secondary color palettes
- Tone, voice, and other characteristics of your brand's personality
- Your organization's "house style" relating to capitalization, punctuation, abbreviations, and the like. This includes preferences like grantmaking vs. grant-making
- A comprehensive, supplemental reference (such as the *Associated Press Stylebook* or *The Chicago Manual of Style*) and the preferred dictionary for issues not addressed by your in-house style guide
- Naming nomenclature for your key programs, projects, and facilities
- A glossary of terms specific to your organization or its sphere
- Frequently misused or misspelled words
- Words your organization chooses to avoid

Get Started

For tips on creating your own style manual, see our **Identity Guidelines** and **Campaign Style Guide** at causecommunications.org/toolkit.

Accelerate Your Learning

GO

To get expert help with brand identity, see our Bite Size Course, **How to Create a Consistent Brand** (causecommunications.org/tools).

By the Numbers

More than half of you report branding/visibility is a moderate to serious challenge for your organization. (Kauffman Nonprofit Effectiveness Survey, 2017)

Check the Consistency of Your Visual Identity

Cover up the logo on all your publications. Would you still recognize them as coming from one organization? You should see a consistent use of color, type, and image style.

Are your logo and logotype distinct, unique, and memorable compared to your peers?

Roadside Assistance

Logo Design Love, David Airey, 2014

Designing Brand Identity, Alina Wheeler, 2017

Making and Breaking the Grid, Timothy Samara, 2017

MESSAGE DEVELOPMENT

Message development includes thinking strategically and creating language that you deploy consistently to convey the big ideas of your organization.

Accelerate Your Learning GO

For help tuning up your messages, see our Bite Size Courses, **How to Craft a Core Message** and **How to Tailor Your Message** (causecommunications.org/tools).

Creating Your Core Messages

What do you want people to know about your organization? When others talk about your work, what do you want them to say? Think of the three or four most important points that you want your audience to understand about your organization. These core messages should relate to who you are and why you exist as an organization. For example, if your mission is to help women with chemical dependencies recover, you may want to emphasize that your services are free, nonjudgmental, and confidential.

It's also helpful to think about your organization's "firsts, bests, and onlies" when crafting your core messages. Homing in on these attributes will make your messages more memorable, capture what is unique about you, and reflect what is important to your key audiences.

Keep in mind the need or challenge your organization addresses, and the ways in which your organization addresses those needs. What impact do you have on individual lives and the community overall? What has changed because of your organization's work?

Keep your key messages simple, and make sure employees and board members can articulate them easily. Use your key messages repeatedly. You will be tired of hearing them long before they sink in for external audiences.

Nonprofits and foundations are notorious for using insider language, acronyms, buzzwords, and other jargon. When crafting messages for your organization, be mindful of jargon and the confusion it can cause. Keep your language as clear and relatable as possible. Make sure someone who has never worked in your field can understand what you're trying to convey.

You will also need to develop messages for specific audiences, campaigns, programs, and projects. And keep in mind that all messages should relate back to your brand and be relevant to your audience.

Framing Matters

Frames are mental constructs everyone has that help to define how they feel about the world. Framing your messages means thinking through how best to align your messages with views already held by your target audiences. Essentially, you're trying to create a bridge between your cause and what your audiences care about.

For example, the campaign "Don't Mess with Texas" aimed to reduce the cost of litter removal and keep the state beautiful. The target audience of 15- to 24-year-old males didn't care about either of those goals, so the message was aligned with something that was relevant to them—pride in being a Texan. Similarly, the "Truth" campaign tapped into the teen psyche by focusing not on the dangers of smoking, but rather on the way the tobacco industry was exploiting the youth market. Instead of being cool to smoke, it became cool to reject tobacco-industry manipulation.

The "Don't Mess with Texas" and "Truth" campaigns also are excellent examples of the importance of framing your issue in a way that resonates with the audience you're trying to reach.

Compelling messages are simple, consistent, and memorable.

By the Numbers

78% of you say storytelling is important to the achievement of your organization's goals.

Messages That Stick

The most effective and memorable messages are:

- Simple, making use of analogies (The Center for Science in the Public Interest, for example, refers to fettuccine alfredo as "a heart attack on a plate.")
- Unexpected, producing a short circuit between two mental frames (The Ad Council's "buckle up" commercial pretends to be an ad for a new family minivan, until the van is struck broadside by another car.)
- Concrete, using specific language and details
- Credentialed, relying on authorities or testable ideas
- Emotional, tapping negative or positive feelings
- Personal, incorporating stories with real people

Source: "Loud and Clear: Crafting Messages That Stick—What Nonprofits Can Learn from Urban Legend," by Chip Heath, in *Stanford Social Innovation Review*

Great Taglines

Taglines exemplify the art of focusing your message. While not required for every organization, a tagline can be a powerful asset by adding dimension and clarity to a brand. At its best, a tagline introduces audiences to the brand it represents and entices them to learn more. The tagline is an opportunity to articulate what makes you unique and connect an idea with your audience.

Although taglines offer an efficient way to deliver a lot of information about your brand, it is difficult for a tagline to capture all aspects of an organization's work, vision, and personality. When developing a tagline, think about what part of your organization you want to highlight or the most strategic role for the tagline to play as a communications tool.

An effective tagline can accomplish one or more of the following purposes:

- Clarify your core activities or positioning
- Express an important brand attribute
- Provide support or rationale for your positioning
- Help people recognize and remember you
- Elicit emotion and paint a picture of your brand personality
- Convey your brand's promise

Taglines can be diverse in their structure and tone. While there is no single blueprint for what type of phrase or construction should be used, the most effective taglines often share some key characteristics.

Here are a few examples of great taglines:

"A mind is a terrible thing to waste" —United Negro College Fund

"Care. No matter what." —Planned Parenthood

"Because the earth needs a good lawyer." —Earthjustice

"Nothing stops a bullet like a job." —Homeboy Industries

Telling Your Story

Mission-driven organizations do important and meaningful work that can change lives and improve our world. Take the time to gather the stories that demonstrate the impact your organization has on those it serves. By telling stories of how individuals are affected by the issue you are working to solve, you personalize your mission and goals and make them more memorable.

Storytelling can be used effectively no matter what communications vehicles you employ—from your annual report and case for support to your website and fundraising appeals. The best stories have a beginning, middle, and end: establish the heroes and villains, involve a conflict, and include an emotional hook.

Seven Questions to Sharpen Your Stories:

1. Who's the protagonist?
2. What's the hook?
3. What keeps it interesting?
4. Where's the conflict?
5. Have you included telling details?
6. What's the emotional hook?
7. Is the meaning clear?

Source: Andy Goodman, *Storytelling as Best Practice*

Accelerate Your Learning GO

Need directions? Try our Bite-Size Course, **How to Tell Your Story** (causecommunications.org/tools).

Ingredients of a Great Tagline:

- Short/succinct
- Simple—convey a single idea or benefit
- Specific
- Believable
- Meaningful, clear language —avoid jargon, clichés, and overused statements
- Memorable—for both staff and external audiences

Roadside Assistance

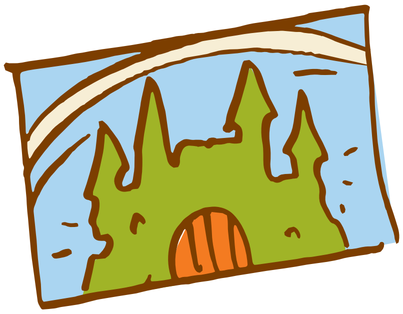
Navigating the Ethical Maze: Storytelling for Organizations Working with Vulnerable Populations, HHYP and Michael Kass, 2017

Storytelling for Grantseekers, Cheryl A. Clarke, 2009

Unleash the Power of Storytelling, Rob Biesenbach, 2018

FrameWorks Institute

The Opportunity Agenda



Ethical Storytelling

There is no denying that storytelling is a powerful tool that can help organizations move their mission forward. But with that power comes great responsibility—responsibility to the storyteller as well as the audience, especially if your organization works with vulnerable populations. Ethical storytelling means telling impactful stories that reach your audience at its core, while ensuring that storytellers retain ownership of their narratives and minimizing any additional trauma.

When selecting your next story, keep in mind that you are responsible for creating a safe environment for the storyteller. Get deep consent (beyond HIPAA compliance), be upfront about the use of the story, and measure carefully for any possible impact on the storyteller. Be open-minded in your storytelling, highlighting small moments of incremental change and resonance rather than just focusing on the standard case/example model. Whatever story you're telling, ensure that it reflects the core message of your organization while preserving the humanity of the people with whom you work.

Source: HHYP and Michael Kass, Navigating the Ethical Maze

Accelerate Your Learning

GO

Go the extra mile with our Bite-Size Course **How to Choose a Messenger** (causecommunications.org/tools).

Identifying the Best Messengers

Once you've developed a strong core message and story for your organization, it's time to think about delivery. Knowing who can connect with and influence your audiences is an important part of effectively communicating your message. While your Executive Director may be the public face of your organization, she or he is not always the best messenger for every campaign or audience. Consider the type of person who can reach your stakeholders and motivate them to act. Whom do your audiences respect and listen to? Whom do they find credible?

To find the right messenger for the job, first clarify those you are trying to reach. Once you've identified your target audience, think about who and what influences them. Then find a messenger who aligns with these criteria and who can be a persuasive authority. This person might be associated with your organization already—such as a board member, staff member, or volunteer—or this messenger could be a prominent public figure, a celebrity, or a leader who is part of your audience's community.

Advice From Expert Storytellers

- The best stories are the ones that you remember and that move you to re-tell them or take action.
- People will forget what you told them. They will forget what you did. But they will never forget how you made them feel through stories.
- Don't make your story about your organization, make it about your cause and clients.
- Storytelling does not have to live within the marketing team. Employees, clients, and supporters can contribute to a culture of storytelling.
- Get your staff or others to share stories by pairing them up with a partner to transcribe it.
- A story has to have a beginning, middle, and end. Talking heads are not stories.

Summarized from "The Future of Nonprofit Storytelling" at the 2012 Nonprofit Technology Conference.

Top Tips

1. Develop a strategic communications plan with specific, measurable, and realistic goals.
2. Build your brand by distinguishing your organization from other institutions.
3. Your organizational identity is a key component of your brand. Develop it strategically and protect it vigorously.
4. Frame your messages to ensure relevance to your audiences and make sure your messages are memorable.
5. Use storytelling as a technique to inspire your audiences and personalize your organization’s messages.
6. Choose your messengers based on who will resonate most with each of your audiences.

CHAPTER 3

How Do We Get There?

Cause Communications
Communications for Good®

Knowing where you want to go is not enough to get you to your destination. You need to be ready for the trip. Do you have the financial and human resources to drive your communications program? Do you know what it will actually cost? It's easy to find support for the *concept* of improving your organization's communications efforts, but when it comes down to allocating the necessary people power and funds, getting support can be more challenging.

How can you secure sufficient funding to implement your plan when your organization has so many other pressing needs competing for resources? And how can you ensure that the time and money you'll spend on your communications efforts not only will be effective, but also will be valued by the organization?

In this chapter, we'll discuss the nuts and bolts of assembling your budget, selling your plan to your board, finding funds when resources are scarce, hiring staff or a consultant, and collaborating with like-minded organizations for cost sharing and greater impact. We'll also cover the importance of strong internal communications and share some tips for making communications a well-integrated part of your organization.

This is about readiness!

BUDGETING AND FINANCING

Building a budget for communications can be a challenge, but there are strategies that can help you gain buy-in and stretch limited dollars.

Funding Communications as an Essential Part of Your Organization

All organizations need financial and human resources to drive their communications programs. But getting the green light on your budget or building a team of communicators can be challenging. And once you're on your way, you don't want to run out of gas mid-way through the journey.

Corporations typically devote a significant percentage of their overall budget to marketing and communications. Why? Because it pays to do so. When companies launch new product lines, you can be sure they've done extensive market research and have significant budgets to promote the rollout. They know whom they need to reach and which communications vehicles will best target those audiences.

The field of social impact is often apprehensive about funding communications in favor of focusing on direct service delivery. This is ironic since a robust communications program is often what raises the resources needed to deliver more services and to strengthen the organization more broadly.

Investing in communications can have a powerful impact on the bottom line, from expanding your organization's donor base to developing goodwill and name recognition. In the corporate world even Coca-Cola®, one of the most recognizable brands on the planet, still spends hundreds of millions of dollars each year to ensure that its product—and what they want people to associate with it—remains fresh in their audience's minds. While we don't often have corporate-sized budgets, the lessons are the same. Long-term investment in your organization's brand pays lasting dividends.

So how can you secure sufficient funding to implement your plan when your organization has so many other pressing needs competing for limited resources? And how can you ensure that the time and money you'll spend on your communications efforts will be not only effective, but also valued by the organization?

We've put together the essential tools for assembling your budget, selling your plan to your board, finding funds when resources are scarce, hiring staff or a consultant, and collaborating with like-minded organizations for cost sharing and greater impact.

Creating a Budget

Creating a realistic and carefully crafted budget is critical to keep your communications program on track. Assigning actual dollar amounts to particular communications projects can be a real eye-opener, and it also can be used as a buy-in tool with your board to demonstrate the investment that is necessary to implement your plan.

For each component of your communications program, be sure you can clearly articulate the value it will bring to your organization and the resources required to make these benefits a reality. Develop an outline that succinctly describes the project, its purpose, and the expected outcomes. Each project should have a timeline and an itemized list of the hard costs involved. Be realistic about what things actually cost and also how long they take to complete. Changes in the timeline can have a significant impact on the budget.

Refer back to your communications plan, or even your organization's strategic plan, to be sure you're targeting the communications efforts that best support your broader priorities. Which activities stand to have the biggest impact on your goals—both within communications and for your organization as a whole?

Be prepared for something to change down the road (it always does). Adding a line item for unanticipated expenses, or a small cushion in the budget for a major project, positions you to be responsive to new opportunities and absorb cost increases.

The best way to build a bigger budget is to demonstrate that the funds you've spent have shown a return on investment (ROI). The more you can show how well it's working—through surveys of happy audiences, quantitative results for key metrics, or even increased grants or donations that further your organization's mission—the bigger your communications budget will grow over time. Build evaluation into your plan from the beginning.

By the Numbers

Lack of financial resources is the #1 reported top barrier in communications.

Expect the Unexpected

A great rule of thumb is to carefully estimate the number of hours you think a project will take, and then double your estimate. You can incur rush fees for print and design if a publication you initially planned on doing four months down the road suddenly needs to be produced in three weeks, or if your event is moved up from August to April. Building a buffer into your budget helps you stay nimble no matter what surprises come your way.

Stretching Limited Dollars

Here are a few ideas for using your communications funds wisely:

When resources are limited, it's even more important that you reach the right audience with the right message. One of the best investments you can make is to research your audiences before investing in any communications vehicle. Remember, research doesn't have to be expensive. See Chapter One, Research Basics, for low-cost research strategies.

Take advantage of digital communications tools. Publishing an e-newsletter is cheaper than publishing a paper version and may even be preferred by your key audiences. An email appeal instead of a traditional mailing can raise similar funds at a fraction of the cost. Online annual reports and downloadable fact sheets can also provide the information your audiences want in a format that is accessible to them and more cost effective for you. Bonus: Digital versions are easier to update, expanding the lifespan of your materials. See Chapter Four for more ideas.

Make your materials pull double- (or triple-) duty. If you only have enough budget to produce one printed piece this year, think about how it can meet multiple needs. Can you use a short annual report as a general brochure? Can a branded promo item be your leave-behind at conferences as well as a "thank you" gift for your volunteers? How can you maximize a single photo shoot to cover image needs of several projects?

Be strategic about printed materials. If you're continuing to create printed materials, it can be relatively easy to save costs without sacrificing quality by making a few minor adjustments in your print specifications. Your printer might be able to suggest ways to cut costs, such as slight changes to the dimensions of a piece. You can also try reducing the number of pages. A simple change in paper stock can have an enormous impact on the bottom line. And remember to plan ahead—larger print quantities mean smaller per-piece prices. If you think you might reprint your brochure again in six months, consider doing one larger print run.

Budget Busters

Don’t get caught with a flat tire on your journey! Here are some tips to keep your budget on track:

- **Get competitive bids for every project.** Ask for apples-to-apples quotes from each vendor, offering the same services or level of quality and materials.
- **Check credentials and client references**, as well as portfolios and other work samples. It’s heartbreaking to invest your hard-earned dollars with someone who doesn’t come through.
- **Be specific.** Know exactly what you’re getting for your money.
- **Time is money.** Develop schedules and hold folks to them.
- **Don’t get caught off-guard by hidden costs.** Design estimates often don’t include the cost of illustrations or photography. Print and photography estimates often do not include sales tax.
- **Check to make sure your images are royalty free**, or that you’ve negotiated the usage rights you need.

Build a Budget for Communications

As a general rule of thumb, the U.S. Small Business Administration recommends spending 7–8% of revenue on communications and marketing for businesses earning less than $5 million in annual revenue. Aiming for 5% of your organization’s total budget may seem ambitious, but all organizations should budget for communications the same way they budget for payroll and rent. Start small and build on your successes.

Roadside Assistance

The Budget-Building Book for Nonprofits, Murray Dropkin, Jim Halpin, and Bill La Touche, 2007

Sample Nonprofit Budgets, GrantSpace

Budgeting Best Practices, Nonprofit Finance Fund, 2017

RAISING FUNDS

How do you build a comprehensive communications program when your plans are big—but your budget isn't? You have more options than you might think.

Identifying Your Funding Sources

Consider asking an individual donor to underwrite the cost of a website refresh or outreach campaign. This is an often-overlooked strategy that can strengthen your organization's relationship with a donor while attracting additional supporters through the project she/he is supporting.

Pool your resources with other departments. If a communications project directly supports your organization's fundraising goals, work with your Development Director (if you have one) to see how you can share the costs.

Engaging volunteers who support your mission and have specific skills (such as retired executives and reporters) and obtaining pro bono assistance from lawyers and accountants can also help you stretch your limited resources. Pro bono services can be a tremendous resource if managed professionally. If you accept favors or freebies, however, be sure to follow normal business protocols by clearly outlining project details and expectations and obtaining signed contracts. Identify the value of the services, even if it's a trade.

Corporate sponsors may also be available, either as funders or for in-kind donations (such as wine for an event or computers and software from technology companies). The foundation world is also aware of the power of communications, so build communications into your grant proposals. And be tenacious. Remember the sales caveat that 9 percent of the salespeople make 90 percent of the sales because they don't give up.

Foundation Funding

Many foundations support communications as a component of the programmatic grants they award, and an increasing number of foundations fund communications-based projects. Grants for capacity building or general operating support are also great ways to pursue funding for your communications work.

Research the foundations that fund each of these areas and be sure to look locally and nationally. Don't overlook your current funders: If your organization already has a great relationship with a foundation that cares about your mission and supports your programs, start by having a conversation with them to see if they'd be open to including communications in their next grant.

More and more foundations see the wisdom of funding communications. They see how communications can:

- Raise awareness of causes they support and people they want to help
- Move an organization to greater levels of self-sufficiency—reaching new donors and people in the community who will then lend their support

Partner with your fundraising colleagues to ensure that communications is included in all grant requests. All programs should have some communications built in to ensure you can effectively engage your audiences during the project and share learnings and impact after the project.

Corporate Partners

Many corporations look for social impact opportunities, so think creatively about those who are likely to help and those who fit with your organization. Companies will be motivated to give if your mission aligns with their industry, or if there's overlap between your constituents and their prospective customers. Does your organization focus on promoting healthy lifestyles? Contact a running shoe company, local sporting goods store, or gym and invite them to sponsor your upcoming Run/Walk event.

Cultivate support from corporations through direct funding or in-kind donations. As you build out a corporate giving strategy, tap into your board's networks for potential leads and introductions.

'Friends' of the Organization

In the communications field, it's easy to find a sympathetic ear. Agency principals, freelancers, creative professionals like designers and photographers, and even marketing departments of big companies are all likely prospects to volunteer services. These are people who know the difference communications can make, since it's their chosen profession. They're one of your best groups of allies. Even if they can't donate services pro bono, it can be extremely helpful to have a network of friends you can go to for feedback on ideas, high-level counsel on strategy, and referrals to other resources.

By the Numbers

75% of you report that a strong communications program is very important to reaching your organization's goals, yet 41% of you do not have any staff that focuses exclusively on communications or marketing.

You're not alone. The key to finding funds is to be creative, and don't be afraid to ask.

Roadside Assistance

Collaborative Philanthropies, Elwood M. Hopkins, 2005

Nonprofit Fundraising 101, Darian Rodriguez Heyman, , J.D., 2016

Effective Fundraising for Nonprofits, Ilona Bray, J.D., 2016

SELLING IT

Getting your board 'on board' is essential to building lasting support for your communications effort.

Making the Case for Communications

Does your organization allocate a set percentage of its overall budget to communications? Or do you have to demonstrate the need for communications funding year after year? Maybe your board or senior administration is worried that some constituents will view an aggressive communications effort as a waste of dollars. Communications should be used as the effective business tool it is.

Nonprofit boards often include successful business leaders. Measure the return on investment and the projected results of your efforts in language your board understands—the financial impact. Show the return on investment that might be gained through a public education campaign or a media relations program. For example, it's powerful when you present the need for a $25,000 expenditure that can result in $100,000 of new services delivered or additional dollars raised. Quantify the expected savings or increase in benefits in order to demonstrate the value of investing in communications.

If you've done a competitive analysis, show the board what the other organizations in your community—those who are trying to get attention from the same audiences you want to reach—are doing.

Have a problem with general awareness? Take a video camera (and release forms) to a shopping mall and ask passers-by what they know about your organization/issue. Your board may be more willing to consider an increased investment in communications when faced with the reality that the messages they think are clear and convincing are not getting through to your audiences.

"In the modern world of business, it is useless to be a creative, original thinker unless you can also SELL what you create. Management cannot be expected to recognize a good idea unless it is presented to them by a good [salesperson]."

—David M. Ogilvy, Advertising Pioneer

Educating Your Board

Chances are that your board members care deeply about the success and growth of your programs. Remember to educate your board about the communications resources you need to support the programs you offer. Provide regular updates on the ROI of your communications and use metrics and evaluation to demonstrate the impact of those efforts. Help your board understand the critical role that communications play in fulfilling your organization's mission.

The planning phase of a major capital campaign or other fundraising effort for your organization is a great opportunity to leverage increased funding for your ongoing communications efforts. It's easier for the board to understand the need for investment when a campaign is being considered, and a major communications effort provides an opportunity to unite stakeholders behind a shared objective.

It's also important to sell your communications plan to employees, volunteers, and other key influencers throughout the organization. If your staff is speaking with one voice externally, your organization will be sending a consistent message that can boost your efforts.

And try to keep your board or senior team from becoming backseat drivers. Prohibit design, or crafting of communications projects, by committee. Protect the creative process and put clear limits on the review-and-approval process. Solicit input to create buy-in, but distinguish between input and decision making.

Get Started

Find a sample **Photo / Video Release Form** at causecommunications.org/toolkit.

By the Numbers

85% of you report senior leadership is involved in your organization's communications efforts.

Watch Your Language

Board members and colleagues in non-communications functions may often find the tools of our trade perplexing, and they may be uncomfortable with their own lack of technical understanding. Whether you're talking about media buys, PMS colors, search engine optimization, or why you can't add just one more page to a publication, you're often perceived as speaking a foreign language. Take the time to educate your senior team and avoid jargon whenever possible. Speak the board's language—talk about how communications can help them achieve their objectives.

Roadside Assistance

Nonprofit Hero: Five Easy Steps to Successful Board Fundraising, Valerie M. Jones, 2018

The Nonprofit Board Answer Book, BoardSource, 2011

HIRING HELP

Determine what to handle in house, what can be done by a consultant, and what will have to remain undone until additional budget or staff becomes available.

Staff or Consultant?

In mission-driven organizations, staff members wear a variety of hats and are often spread too thin; it's unlikely you'll be able to hire as many people as you could put to good use. You'll have to prioritize between building up in-house staff or hiring outside help. It's always preferable to have staff inside the organization focusing partly or exclusively on communications issues so that long-term knowledge of the organization and its work can be brought to bear on communications challenges. But it's a luxury many institutions cannot afford.

Break down the type of assistance you require. Do you need a senior-level expert for 25 percent of the work, clerical help for another 25 percent, and writing support for the balance of the project? If so, hiring a consultant can be more cost effective than a full-time staff member.

For certain projects, especially research and branding, consultants can save you money in the long run and help you make a stronger case with your board. Their experience implementing best practices at a variety of organizations—and sometimes their outsider status—often gives their opinions greater weight than those of in-house staff. Key audiences and senior leadership may be more candid with a consultant, providing more valuable feedback. And a consultant may help facilitate consensus more readily than internal staff. Evaluate your organization's unique situation to make an informed decision about whether to remain in-house or use a consultant.

Friends and Volunteers

Personal connections and volunteers can be a great source for pro bono support, but proceed carefully if a board member suggests using her fresh-from-art-school daughter to design your annual report. Is this person prepared to deliver the quality and professionalism you need? You'll want to make sure their qualifications and experience are just as strong as any consultant you'd hire. Free help can be very attractive, but sometimes you get what you pay for.

Get Started

Use the sample **Creative Brief** at causecommunications.org/toolkit.

Tips for Working With Consultants

Choose the right consultant for the project. Are they a good fit? Do they have a track record of success with the type of issues you are facing?

Check references. Does the consultant consistently deliver on time and on budget? Take a look at the consultant's previous work.

Ensure you are on the same page regarding the creative and budgetary aspects of the project.

Clearly delineate roles, responsibilities, processes, payment terms, and timeline.

Seek buy-in from the staff and explain what you hope to accomplish with outside help.

Be clear about who will oversee the work and who will serve as the key contact for the consultant and sign off on decisions.

Do the prep work necessary to bring the consultant up to speed.

Develop a creative brief at the outset of the project that outlines agreed-upon goals, target audiences, timeline, and other critical elements.

Put your agreement in writing and include a clause that allows you to gracefully—and legally—bow out for any reason, incurring only the costs of work actually undertaken.

Set up regular check-ins with your consultant to stay abreast of progress, confirm priorities, and collaborate on solutions.

Don't second-guess your consultants. You've hired them for a reason and if you've made a good hire and effectively communicated your goals, you should be able to trust their professional advice.

Don't expect the consultant to be solely responsible for developing your plan or establishing your mission, vision, and goals. His/her role is to facilitate your decision-making process.

Remember: No One Can Do It All

No one person can realistically handle all needs, from the highest-level strategy to day-to-day implementation. If you're considering hiring communications support, create a job description that is precise, realistic, and speaks to your most strategic communications needs. This clarity of focus will set you up for greater success and increase the likelihood you'll be able to hire additional help down the road.

By the Numbers

Just 18% of you frequently use outside assistance for communications.

Six Good Reasons to Hire a Consultant

1. No one has the expertise you need.
2. You have the know-how but not the time.
3. You're too close to the issue and can't be impartial.
4. The project is confidential and inappropriate to assign internally.
5. You need an expert's credentials to help you sell your board.
6. You need help on several experience levels, so it's not cost effective to hire a single person.

Roadside Assistance

How to Write an Inspired Creative Brief, Howard Ibach, 2015

Nonprofit Consulting Essentials, Penelope Cagney, 2010

The Alliance for Nonprofit Management

NETWORKS AND COLLABORATION

Collaboration can make limited resources stretch further, build widespread support for your common objective, and avoid duplication of effort.

Collaborating for Impact

What if similar organizations, with similar communications goals, worked together to inform audiences about important calls to action, such as increasing voter registration or stopping domestic violence? Whether you partner with other nonprofits, like-minded service providers, corporate sponsors, foundations, universities, government agencies, or the media, opportunities for meaningful strategic alliances are plentiful.

Who is doing the same sort of work, or complementary work, and how can you collaborate to mobilize efforts, save money, and have a greater impact? You may be able to attract more media coverage for your report on environmental pollutants by building a coalition of health agencies, environmental groups, and neighborhood associations. As another example, a consortium of theater companies might want to jointly advertise their upcoming performances to save money.

Savvy donors want their dollars to have the biggest impact possible. Like-minded institutions partnering to reduce overlap and increase the reach of their messages will find donors ready to join their cause. Nonprofit coalitions can leverage significant increases in funding for collaborative communications efforts. Such practices also make nonprofits more accountable to donors and allow them to more effectively serve their audiences.

It's important to be realistic about the challenges of such collaborations, of course. Each organization brings to the work its own goals and challenges, and it can take time to build trust and methods of working together that allow for the most effective partnerships. Being open about what you hope to achieve with a shared campaign, and honest about the comparative strengths and challenges you and each of your partners bring to your shared work, will foster shared expectations and protect against disappointment later.

Building and Leveraging Networks

Sustainable, effective collaborations require work, commitment, and compromise—just like any good relationship. When considering if a network approach is the right fit, ask:

- What can be accomplished together that cannot be done individually?
- What is the shared purpose?
- What are the shared values?
- What individual/organizational interests are you willing to compromise for the sake of the collaborative's goal?
- What responsibility is your organization willing to take to get the job done?

In addition to these broader questions, there are also important branding considerations you'll need to work out at the beginning of any partnership. There should be an agreement in writing that outlines how the network will be branded, when the network's name can/should be used, and how participating organizations will be acknowledged. What activities will fall under the banner of the network, and what will continue to be "owned" by each organization? Determine the consistent description and key messages everyone will use when talking about the network, and decide whether the network will have its own social media presence.

By the Numbers

88% report that collaborating is important to the success of your organization. However, fewer than 1/3 have a plan for engaging in new partnership or collaborations.

(Source: Kauffman Nonprofit Effectiveness Survey, 2017)

Evaluating Potential Partners

Ask these seven questions before collaborating with an external partner:

1. Are your organizations' cultures, values, and ethics compatible?
2. Does the other organization have a clear mission and strategic plan? Is the organization managed well?
3. What can they bring to the table? Why does it benefit you to partner? And vice versa: What do you bring? How does collaboration benefit your partner?
4. Would you have stronger capacity to serve constituents by working together than you would separately?
5. Does your leadership support the collaboration? Does theirs?
6. Who are their other partners?
7. Do you have a written agreement that details the objectives and goals of your collaboration, outlines expectations, and allows you to back out if necessary?

Cause-Related Marketing

Corporations recognize the value of strategic alliances with causes. In 2017, corporate spending on cause marketing topped $2 billion, according to a recent IEG Sponsorship Report in conjunction with Engage for Good.

And according to a 2015 Cone Communications and Ebiquity Global CSR survey, when choosing between two brands of equal quality and price, 90 percent of U.S. shoppers will choose a cause-branded product. Although the amount of royalty revenues generated by nonprofit deals pales in comparison with that of corporate licensing, funding from cause marketing more than doubled between 2003 and 2015 in North America, according to a 2014 IEG Sponsorship Report.

Alison Glander, CEO of PowerPact, adds: "Generating consumer dollars for cause programs also builds awareness of social issues and develops loyal constituencies for nonprofits. The people who are shopping with a cause in mind are the same people who will get out and lobby."

So what does this look like? One example is the partnership between the National Wildlife Federation and Home Depot to create products for their "Backyard Wildlife Sanctuary" initiative, which featured items such as bird seed and birdfeeders. Programs like Amazon Smile also provide opportunities to partner with a large corporation.

A strategic partnership with the right company has the potential to add value for both parties. Consider approaching a company that aligns with your mission or issue area to explore developing a cause marketing program together.

Media Sponsorships

A number of media outlets sponsor charitable causes, especially if the charity holds large events through which the publication, radio, or TV station can build brand awareness and loyalty. For example, in exchange for having its logo included on the nonprofit's marketing items (T-shirts, brochures, posters, banners, ads, etc.), a newspaper may offer the charity free advertising space. A radio or television station may offer a deejay or anchor to serve as emcee for the event. Some media outlets even donate money.

In any partnership, consider what you can achieve together that wouldn't be possible alone.

Roadside Assistance

Unicorns Unite: How Nonprofits and Foundations Can Build EPIC Partnerships, Jessamyn Shams-Lau, Jane L. and Vu Le, 2018

A Statement of Values to Guide Philanthropic Collaboration, Grantmakers for Effective Organizations, 2017

Developing Effective Coalitions: An Eight Step Guide, Prevention Institute

Networks That Work, Paul Vandeventer and Myrna Mandell, Ph.D., 2011

INTERNAL COMMUNICATIONS

A strong communications program is built from the inside out, so it's important to lay the foundation by focusing on people and processes.

Get Started

Check out our **Readiness Checklist** at causecommunications.org/toolkit.

Accelerate Your Learning

Get everyone on board with our Bite-Size Course, **How to Turn Board Members into Brand Ambassadors** (causecommunications.org/tools).

Building a Culture of Internal Communications

Getting ready to embark on your communications journey requires more than just securing resources and building your capacity through external partnerships. Your internal audiences are also key to communications success. Your goal is to turn your coworkers and board into "brand ambassadors" for your organization.

Good internal communications begin by having defined organizational values and clear roles/expectations for staff that lay the groundwork for shared goals that unite the entire organization. A common purpose fosters teamwork and collaboration, facilitates compromise and problem solving, and encourages information sharing.

What tools and tactics will you use for communication between leadership and staff, and between staff members? What processes will keep information flowing and help avoid last-minute surprises? At a time when communications is increasingly democratized and decentralized within organizations—thanks in part to the proliferation and ease of digital platforms—it's important to think of everyone as a communicator.

When mapping out your communications plan, include staff and board members as key audiences and consider the roles these groups play in carrying out your organization's communications goals. Equip them with the information and resources they need to contribute to specific communications initiatives and play to their strengths when you're devising creative solutions for engaging external audiences.

The benefits of strong internal communications are numerous. From greater efficiencies to speaking in one voice, internal systems are key to accelerating external impact. Additionally, when there's buy-in from staff across the organization, individuals feel a greater sense of pride and ownership in the work—which can lead to better morale and staff retention rates. Strong internal communications strengthens your organization at every level.

I've learned that you can't HAVE everything and DO everything at the same time.

—Oprah Winfrey

Competing Priorities

As the clearing house for materials and design, messaging, and public announcements, chances are there are times when you feel like your day is an endless game of "Whack-A-Mole," with requests from colleagues, leadership, reporters, and even board members. In these situations, it can be challenging to shift out of reactive mode or even know which request to prioritize. That's where tools like a communications request form can come in handy. This simple form—which should require key information like the project's description, target audience, and purpose—will help establish a process and a pipeline that can be managed more easily and effectively than just by the order items appear in your inbox.

Another way to help you triage competing priorities is to use the Eisenhower Matrix. Introduced by President Dwight D. Eisenhower and further popularized by Stephen Covey, author of *The Seven Habits of Highly Effective People,* this time management matrix uses four quadrants to determine the urgency of tasks. We have adapted the matrix for use in communications:

	URGENT	NON-URGENT
IMPORTANT	**Crisis** (Do)	**Goals & Planning** (Plan)
NOT IMPORTANT	**Interruptions** (Delegate)	**Distractions** (Eliminate)

An Integrated Approach

Communications plays an essential role in the success of all areas of your organization—from programs and development to advocacy work and board governance. Coordination and integration across departments is key to ensuring that messaging is consistent, strategies are aligned, and specific activities all support broader shared goals. An integrated approach also plays a big role in creating a seamless and satisfying experience that reflects your brand to your external audiences.

Position the role of your communications enterprise as a strategic partner to all other staff and departments—one that merits having a seat at the table at the outset of a project. Include communications at the brainstorming and development stages to create space for new ideas to emerge, clear roles to be defined, and realistic timelines between departments to be agreed upon mutually. Urgent needs and unexpected opportunities are part of life. The more you can keep communications proactive and strategic, the more likely you are to achieve your goals.

Internal Champions

Staff in other departments can be valuable sources of information and help keep lines of communications open through less formal channels. Identify or recruit individuals who can be your eyes and ears throughout the organization, and who are trusted messengers for bringing back feedback and new ideas. Internal champions can be especially helpful if your organization spans multiple locations.

Board Members as Ambassadors

A key to strong internal communications is equipping others with the resources they need to represent the organization externally. Board members often have extensive networks and regularly meet new, influential people. That, combined with their genuine commitment to the organization's success, makes board members incredibly valuable ambassadors for your cause. Take time to prepare them to comfortably talk about your organization, why they care about it, and why others should, too. Provide core messaging points and up-to-date calls to action so they can effectively engage others in a way that is consistent and authentic.

By the Numbers

60% of you have no long-term strategy for internal communications.
(Source: Arthur J Gallagher & Co.)

Tips for Engaging Staff

- Encourage participation, ask for feedback, and excite staff about your cause
- Help staff understand the value of communications through the lens of their role
- Leverage technology (e.g., an intranet or other information-sharing tools)
- Communicate regularly and equip staff with communications resources
- Create opportunities for knowledge sharing

Roadside Assistance

Maximizing Internal Communication, Paul Barton, 2014

Employee Communication, CIPD, 2019

Top Tips

1. Clearly outline costs and expectations in your budget.
2. Be realistic about what things actually cost.
3. Show your board members the return they'll receive from investing in communications, whether increasing revenues, advancing mission, or building reputation.
4. Identify specifics about the areas and levels of expertise you are missing before hiring staff or consultants.
5. Clearly delineate expectations and timeframes to your consultants and get everything in writing.
6. Partner with like-minded organizations to maximize the effectiveness of your communications and expand your reach.
7. Give your internal communications the same level of strategic attention and care as your external communications.

COMMUNICATIONS TOOLKIT
A GUIDE TO NAVIGATING
communications for social impact

CHAPTER
4

What to Take

Cause Communications
Communications for Good®

You've done the hard work of figuring out where you are as an organization, where you want to go, and the resources you need to get there. Now it's time to choose the right combination of tools to implement your communications plan most effectively.

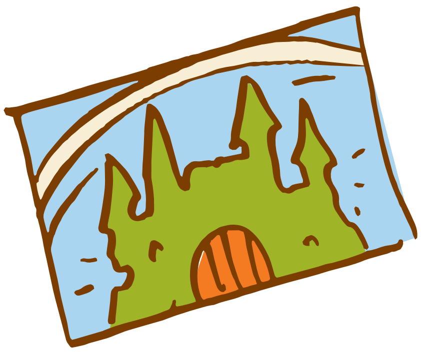
With such a wide range of options available, from websites and social media to print brochures and media relations, how do you know which tools are best for your organization and goals? While cost or "what we've always done" is often the driver, it's best to understand which tactics are most appropriate for reaching each of your specific audiences.

In this chapter, we'll go into detail about tried-and-true—as well as innovative and new—communications tools and how to put together the right mix to meet the needs of your nonprofit. We'll also discuss how communications can strengthen and support other critical functions in your organization, including fundraising and advocacy.

Let's talk tools!

MARKETING MATERIALS

You can communicate as much about your organization through the look and feel of your marketing materials as you can through the words they convey.



Selecting the Right Mix of Materials

When it comes to print and digital materials, the needs of every organization will differ. From brochures and bookmarks to infographics and annual reports, the options may feel endless. It's likely that you'll want to produce at least one printed item that can serve as an introduction to your organization with a clear call to action about how to learn more or get involved. It's also common to have a simple one-page fact sheet that can be downloaded from your website.

In choosing the right mix of print materials for your needs, understand the opportunities you have for interacting with your target audiences, and what you hope to accomplish through each piece. From there, consider the frequency with which your organization has news to report, how often your audiences want to hear from you, and what capacity you have in-house to produce content for these materials.

Organizations are increasingly using marketing materials for more than one purpose to get extra bang for their buck. An annual report, for example, can acknowledge current donors and attract new prospects. Because the report is a place to highlight the organization's impact and vision for the future, it can also serve as an introduction to new audiences.

A Family of Branded Materials

To be noticed, read, and remembered, all of your materials (both print and online marketing materials) need to be visually appealing. They should have a well-branded look that clearly identifies them as from your organization. Always in support of your brand identity, your materials should have a consistent look and express consistent messages.

Once you determine which marketing materials are needed, how do you ensure each piece you produce is effective? We recommend starting with a simple creative brief that covers the purpose, audience(s), and any other parameters that will drive the development of the piece. Use the brief to get clarity and consensus from colleagues; it also makes partnering with a designer a lot easier.

“Design is the intermediary between information and understanding.”

—Hans Hoffman, artist

Print & Digital Publishing

Print Pluses:

- More control over look and feel
- Control over distribution
- Tangible
- Compact and portable

Print Minuses:

- Expensive
- Time-consuming
- Less flexible
- Difficult, expensive to change
- Price fluctuations

Digital Pluses:

- Can be created and posted quickly
- Can be changed and updated easily
- Highly targeted
- Interactive
- Unlimited space (except on some social media platforms)
- Flexibility in number of pages
- Relatively inexpensive

Digital Minuses:

- Less control over exact layout (with HTML)
- Audience must be made aware it exists
- Intangible/ephemeral

By the Numbers

21% of you have created a digital annual report, and 77% say you will do so in the future. (Source: NTEN, Elefint Designs study)

Getting the Most From Your Materials

These best practices apply to both print and digital materials.

- Know your audience(s) and goals for each publication.
- Survey your audience to ascertain if your materials are being read. If not, find out why.
- Hire the right people and let them do their jobs. Discourage design by committee.
- Build your brand by producing materials with a similar look and feel.
- Outline expectations in advance for budget, deadlines, approval process, etc.
- Work backward from your deadline to create a realistic timetable.
- Pay attention to "flow." Every page should visually relate to the previous one, with the final product being a single cohesive whole.
- Use creative, catchy, and short headlines to draw attention.
- Write in a clear, concise, and professional manner.
- Always keep your ultimate audience in mind. Resist the urge to please only senior administration.
- Continually seek feedback from your audience and measure your results.
- Gather inspiration and potential consultants from publications and campaigns you admire.

Low-Budget, High-Impact Ideas for Materials

Creating materials doesn't have to break the bank. Keep these tips in mind to help your project stay on budget without sacrificing quality.

Hire a designer to create template(s) that you can populate for subsequent materials. This gives you professional design at a reduced cost, but be sure you have the skill and training to complete the project in-house.

Submit final copy to your designer, not copy that's still a work in progress. Otherwise, you'll be paying for lots of unnecessary corrections.

Choosing the right paper will save you big bucks (paper is 25 percent of the cost of most print pieces). Look at the "house stock" paper your printer uses or ask what's "on the floor" (paper they have in stock already). You can sometimes achieve a similar look at a significantly lower cost.

Determine your print quantity carefully. Unit costs drop dramatically with volume, but you don't want to be stuck with thousands of pieces you won't use.

Roadside Assistance

White Space Is Not Your Enemy, Kim Golombisky and Rebecca Hagen, 2016

Free Visual Design Resources, Hubspot

Nonprofit Annual Report Examples, Nonprofit Marketing Guide.com, 2016

Society of Publication Designers

EMAIL AND E-NEWSLETTERS

Emails and e-newsletters have become one of the primary ways that organizations share news, spark action, and raise funds.

The Continued Importance of E-communications

Email and e-newsletters seem almost old-fashioned in today's world of instant messaging, chats, social media, and mobile. Does this mean that it's time to abandon email and e-newsletters for the latest and greatest platforms? On the contrary. Email should continue to play an important role in your constituent communications and might even be able to replace some print publications, if it hasn't already.

Email remains one of the cheapest, most direct ways of communicating with your constituents, and e-newsletters, when used correctly, can help them feel a deep and ongoing connection with your work. Current email software products provide a wealth of data about how your emails are being received: how many are opened, how many email addresses are no longer working, even what links your readers click on most often. And as important as email is as a communications tool, it is perhaps even more important as a fundraising tool.

Getting the Most Out of Email and E-newsletters

The key to effective use of email and e-newsletters is putting yourself in your readers' shoes. A good e-newsletter tells stories about the impact of your communications rather than what's going on around your office. While it's nice to recognize a longtime staff member or volunteer, a story about how your programs are making a difference in real people's lives will almost always be more interesting to your readers.

As with blogs, a personal tone—even when your articles aren't bylined—will increase the connection your supporters have with your work. Short, simple articles work best. You can always include a link to a longer story on your website if you want to go into greater detail. Write so that people can skim your mail, with lots of headlines and short paragraphs. Use a mix of different types of content to make your emails eye-catching and engaging. Bold imagery and even embedded video can help break up what might otherwise be a text-heavy message. One-question surveys and trivia questions offer another way to fuel engagement and learn about your audiences.

By the Numbers

93% of you say electronic communications is important to the success of your organization's goals.

E-newsletter Frequency

Deciding how frequently to send your e-newsletter can be challenging: too often and you risk looking like a spammer, too infrequently and your readers forget about you. To guide your decision, consider these questions:

- How much staff time do you have to devote to writing your e-newsletter?
- How often do you have good news about your program to share?
- How often do your peer organizations send theirs?
- Keep careful track of how many people are unsubscribing from your lists. If you see a spike in that number, you may be sending too often.

Roadside Assistance

The Networked Nonprofit, Beth Kanter and Allison H. Fine, 2010

Marketing Tips from Mailchimp, Mailchimp

Mobile Email Marketing Chart, Marketing Sherpa, 2018

YOUR WEBSITE

Your organization's website is your communications hub and should provide a strong framework for showcasing your brand and telling your story.

Website Basics

First impressions about your organization are made online, and usually from a phone. More people access information digitally from a mobile device than from a desktop. That means a responsive, mobile-friendly website is essential—but so are other fundamentals that have stood the test of time. Good sites are easy to navigate, are clearly and consistently organized, and have robust search functions. Short sections of content and descriptive subheads also make it easier for visitors to find the information they want. And if it's a choice between simple and easy to use vs. complex with lots of bells and whistles, opt for simplicity every time.

Maintaining your website is as important as (or more important than) creating it in the first place. Add new content regularly, or at least indicate that the site has been reviewed and updated recently. Write digital-friendly (i.e., concise, clear) text and proofread your site as carefully as you would a print publication. Even though it's easy to make corrections, a site with errors can make users lose confidence in your organization. Your website offers tremendous possibilities for interaction and multimedia that you should explore, resources permitting.

Web development is changing rapidly, and for most organizations a simple, user-friendly CMS (content management system) is all you need. Sites built on WordPress and other similar systems can be designed by professionals and then handed off to staff for ongoing content updates.

"If you want a great site, you've got to test. Testing one user is 100 percent better than testing none. Testing one user early in the project is better than testing 50 near the end."

—Steve Krug, website usability expert

Testing Your Site

To effectively test usability, you need to recruit a few representatives of your target audience and observe them, one at a time, as they try to complete a specific task on your website. For example, you may ask participants how they would go about making an online gift, or finding news about upcoming events, and observe how easy or difficult it is for them to navigate through the process. You'll also want to work with your web developer to assess whether your site meets accessibility standards.

SEO Optimization

No matter how good your site is, if it's not being seen or if your stakeholders can't find it, it's not going to be very effective. If the most widely used search engines don't list your organization's site on the first couple of pages of results, chances are your message is not getting through. Search Engine Optimization (SEO) is a common-sense approach to ensuring your website can be found. What keywords or phrases do your audiences use most often when thinking about your organization or the issue you work on? Make a list of the top ten, and make sure they appear frequently on your site, particularly in headlines and the titles of pages. There are also programs for researching and ranking keywords and phrases.

Eight Common Website Mistakes

1. Not clearly establishing goals for your website
2. Losing sight of the goals of the donors, volunteers, or advocates coming to your site
3. Failure to appreciate what good design brings to a website
4. Overwhelming the reader with content that is too long or complex
5. Not taking full advantage of what an interactive, responsive medium has to offer
6. Not tracking site results in a useful manner
7. Not putting together an in-house web team
8. Not recognizing that the website is a system that must be continually maintained and updated

Source: @issue

By the Numbers

47% of you frequently track web traffic or usage to assess your communications.

According to the International Telecommunications Union, 3.9 billion people (and counting) are online world-wide today.

Roadside Assistance

The Nonprofit WordPress Guide

Don't Make Me Think, Revisited: A Common Sense Approach to Web Usability, Revisited, Steve Krug, 2014

The Elements of User Experience, Jesse James Garrett, 2010

Before You Blog

It's common for a blog to be integrated into an organization's website, but not everyone needs a blog to have a successful online presence. Consider the following questions when deciding if and how to start a blog.

What do we want to get out of our blog? Step one is defining your blog's purpose. A blog can help position your organization as an expert in your field. It can serve as a place for updating your constituents on your activities. It can be a place where your supporters and peers gather to discuss the issues affecting your work. Deciding which of these is most important to you will help you focus your efforts before you start.

What blogs do we like? What blogs do you follow yourself? Which peer organizations have interesting blogs? If you can't answer this question because you're not reading them, you're probably not the right person to be heading up your organization's blog.

Are we willing to devote the time needed to do this right? Decide in advance how often you'll post and be realistic about the time commitment this will entail. Finding interesting things to write about and then taking the time to write them up in a thoughtful and engaging way isn't something that can be done in five minutes a day.

Who's blogging? Will this blog have a single voice or be a group effort? Identify the author or authors and have each think carefully about what kind of posts they'd like to do. For group blogs, make sure to include bios and bylines for each contributor so it's clear who's posting what.

What are we blogging about? Will your blog feature only posts about your organization's activities? Provide up-to-the-minute issue updates? Will you feature interesting work from your peer organizations (or competitors)? What about posts that aren't directly related to your issue?

What's our comments policy? Will you allow everyone to comment, or only registered users? Will comments be moderated before they appear on your blog? While greater openness will encourage the growth of your blog's readership, you'll need to find the right balance between openness and controlling the conversation happening on your blog.

SOCIAL MEDIA

Social media is the word of mouth of the 21st century, utilizing technology that allows us to share not just opinions and ideas, but all kinds of transformative content.

Accelerate Your Learning GO

Jump-start your social media presence with our Bite-Size Courses: **How to Choose Social Media, How to Write Your Social Media Plan,** and **How to be Wonderfabulous in Social Media** (causecommunications.org/tools).

The Power of Connection

The rise of social media in recent years presents organizations with an opportunity to fundamentally rethink their external communications tactics. The traditional purpose of media outreach—letting potential supporters, policymakers, or other key stakeholders in the public know about the work of your organization and your issue—can be done at a fraction of the cost with social media. Social media is also a way to listen to your supporters and learn what they care about. The two-way nature of the communication provides real-time feedback about how well you're connecting with your target audiences.

Keep in mind that social networking is a tactic, not a strategy. It shares many similarities with more traditional communications functions like advertising or public relations: you need to be clear about what you hope to get out of it, about who your audience is, and about how your messages are being received by them. What sets social media apart from more traditional channels is that after you send messages out, your supporters can use the same channels to respond to you directly, and comment to each other about what you've put out there. When interacting via social media, audiences expect authenticity, open dialogue, and a more personal "voice" from the causes they care about.

When a supporter becomes a fan of your organization on Facebook or signs up for your Twitter feed, they're giving you permission to share information about your work with them directly and personally. They're also giving you an endorsement, saying to their friends and contacts that they believe in the work you're doing and that their friends should, too. And that's the power of social media: you connect directly with your supporters, who then connect you to their own networks accompanied by their personal endorsement. This kind of authentic connection needs content that's compelling and timely—the kind of information that they'll want to pass on. Social media is most effective when all the channels you use—to share video, photographs, audio, and text—are interconnected and reinforce each other.

Go Where Your People Are

Be sure you're using the right tools for the job, and that you're not using an emerging channel simply because it's new. Research how your audiences are spending their time online, and make sure that's where you're spending your time.

Social Media Tips

New + Technology = Resistance
New + Technology + Education = Adoption

Facing resistance to your plans for social media dominance? Remember that new technologies are disruptive, and often frightening. Take the time to educate your co-workers about social media and choose a small project as a pilot effort.

Listen First

One of the things that social media does best is allow you to listen. If you're new to social media, this should be the goal of your first trial efforts. Determine which key words or phrases come up most often when your work is discussed online, and experiment with finding patterns in their use across different social media platforms.

The Right People

Effective social media doesn't mean reaching everyone—it means reaching the right people who are the key influencers for the issues you care about and getting them to connect with your organization.

Make Your Content Easy to Share

Social media is all about getting others to interact with your work and share it with their friends. Create content that's fun, relevant, and easy to share.

Hours Per Week x Number of Weeks = Results

Social media takes time and effort. You won't get instant gratification, but patient, smart engagement will pay off in the end.

Not everything that counts can be counted.
Not everything that can be counted counts.

Metrics are important to understanding how well your social media efforts are being received, but things that are harder to measure (e.g., the impact on your brand, the speed at which your constituents can react to your latest efforts) can be valuable outcomes from social media, too.

Taking Time to Listen and Engage

Nothing will turn off your supporters more quickly than using social media as a channel for cookie-cutter press releases and feel-good fluff. Social networking works best for sharing stories about the impact your organization is having and connecting with your supporters. Keep your content varied and balanced: highlight successes, call on your friends and followers to take action, and point out interesting things you've read online that relate to your work. Tell stories of how you're achieving positive change in your community and in the lives of people that you serve.

There's no shortcut to building a strong social media presence for your organization. Take the time to listen to your networks and engage in the conversation happening around the issues you care about. Understand who's following you, and what it is they're looking for. And maintain the presence you create, posting regularly. It's a commitment, and it takes real investment of time and resources.

When it's done right, the rewards can be tremendous: supporters feel closer to your organization, are more willing to donate, and will act as key messengers for your work within their own social networks. It's the kind of authentic relationship with your supporters that money just can't buy.

Three Steps for a Successful Social Media Plan

1. **Determine your goal.** The most successful campaigns are those with a clear goal and a plan to get there.
2. **Identify the audience you need to reach**. Whose lives are impacted by this campaign? Who has a connection to the campaign—personal or professional? Who can influence change towards your goal?
3. **Choose your social media platforms based on what is right for your audience and what you want them to do.** Consider the available platforms and prioritize the top two to three that align with those decisions.

By the Numbers

78% agree that social media is effective for online fundraising.

(Source: 2016 NGO Online Technology Report)

Fast-Paced But Deliberate

Signing up for accounts at Twitter, Facebook, YouTube, or Instagram and posting the first thing that comes into your head doesn't mean you're headed for social networking glory. Communicating effectively in a medium that prizes brevity and fast response times requires even greater message discipline and a firmer grasp on the core values of your organization. Identifying the key staff members who'll be responsible for posting and developing a social media policy that outlines clear guidelines for online behavior can help you sustain a consistent voice and avoid controversy.

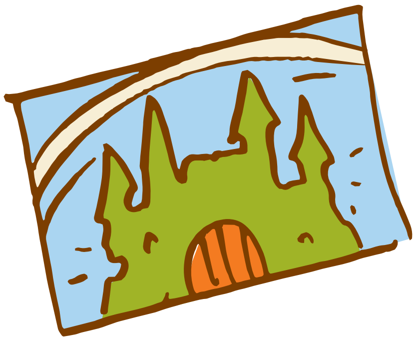
Roadside Assistance

Social Media for Social Good, Heather Mansfield, 2011

The Best Social Media Marketing Resources for Nonprofits, Nonprofits Source

ADVERTISING

Advertising allows you to maintain complete control over content, but it requires a significant budget and long-term commitment to be most effective.



Advertising Strategy

The following attributes are vital to any advertising strategy:

Reach—The number of people in your target audience who will see, hear, or read your advertisement is referred to as "reach."

Frequency—No matter how strong your message, people need to hear your message repeatedly for it to sink in. Keep in mind that by the time you and your board are sick of a message, it's probably only starting to resonate with your audience.

Memorability—Make certain your message is memorable. In advertising, you have only a moment to make an impact. Your audience won't act on your ad if they don't remember it.

Appropriateness—The vehicles for your ads must be appropriate for your objective and for your target audience. For instance, you wouldn't advertise in *The New York Times* to invite donors to an event. Ads for your cause don't need to reach the widest possible audience to be effective; they just need to reach the right audience.

> **"Half of the money I spend on advertising is WASTED; the trouble is I don't know which half."**
>
> *—John Wanamaker, department store pioneer*

Digital Advertising

Digital advertising has brought exciting innovations and new opportunities for mission-driven organizations. Banner advertising (the graphics-based ads at the top and along the sides of web pages) reach highly targeted segments of your audience, and text-based search ads (which show up on search engines above search results) allow you to pay for only those ads that reach your target audience. Advertising on social media also offers sophisticated targeting with visuals that blend seamlessly into each platform. Digital advertising provides a level of detail about the effectiveness of ads that print, radio, and television advertisers can only dream about.

Digital Ad Costs and Key Terms

Online advertising costs are typically structured in three ways:

1. CPA (cost per action)—examples are advocacy sites where you sign a petition or write a letter to a policymaker
2. CPC (cost per click)—examples are Google, Facebook, Twitter
3. CPM (cost per thousand impressions)—examples are banner ads, blog ads, and some online newsletter advertising

KEY TERMS:

Landing Page—Web page where a visitor lands after clicking on advertising

Click-Through Rate—Ratio of viewers that click on your advertising

Conversion Rate—Ratio of visitors taking action on your landing page (i.e., signing up for your emails or making a donation)

Opt-In—Individual actively joins a list

Opt-Out—Individual is added to a list without their approval (has opportunity to unsubscribe)

By the Numbers

46% of you say advertising is important to the successful achievement of your organization's goals.

Seven Principles for Print Ads

1. Capture the reader's attention like a stop sign and direct it like a road map.
2. Make an emotional connection before attempting to convey information.
3. Write headlines that offer a reason to read more.
4. Use pictures to attract and convince.
5. If you want people to read your text, make it readable.
6. Test before; measure after.
7. When everyone zigs, it's time to zag.

Source: Andy Goodman's *Why Bad Ads Happen to Good Causes—and How to Ensure They Won't Happen to Yours*

Roadside Assistance

Ad Council

American Association of Advertising Agencies

Google Ad Grants

Osocio

CONTENT MARKETING

On the road to engagement, your online presence can be the most influential tool in your communications toolkit. To attract engaged readers, you must create compelling digital content that is searchable, readable, and sharable.

Push vs. Pull

Many organizations use a combination of digital and print as a powerful "push/pull" mix to communicate with stakeholders while drawing in new ones. Your direct mail pieces, print newsletters, emails, and fundraising appeals "push" your message out to current audiences while your websites and other digital content like blogs, social media posts, and video help "pull" in new audiences. Essentially, you're creating content that pulls people back to your cause. Content can be original or curated and be delivered in a wide variety of formats. Content can live on the communications platforms you own (like your website) or it can be shared via third-party sites and events.

The key is that the content must provide value to those consuming it; it's not an ad, it's not a call-to-action for an advocacy campaign. It's information that educates, inspires, or helps meets some sort of need for your readers. Using content strategically in this way—to engage existing and new audiences—is known as content marketing.

The Content Marketing Institue defines content marketing as a strategic marketing approach focused on creating and distributing valuable, relevant, and consistent content to attract and retain a clearly defined audience—and, ultimately, to drive profitable customer action.

Does your CRM software company offer free webinars or an annual industry forecast on email marketing trends? These are examples of content marketing. Read on to discover what this could look like in your organization.

Five Key Facts About Content Marketing

Content marketing:

1. Is most effective as a long-term strategy
2. Focuses on/helps you build a strong relationship with your target audience
3. Delivers high-quality content that is relevant/valuable to your audiences
4. Prioritizes the educational over the promotional
5. Builds loyalty and trust

The Role of Content Marketing in Relationship Building

Content marketing can be a great way to deepen relationships with existing audiences and introduce yourself to new audiences. Strong, relevant content can often travel beyond the boundaries of your existing network or community.

For each piece of content you produce, try to share it at least three different ways. If your organization publishes a research report, for example, you can promote it on social media, write a blog post about it, and develop a webinar to present the key findings.

If you partner with any other organizations in your work, collaborate with them on the marketing, too. Did your organizations co-author a research report? If so, explore whether the corresponding blog post you wrote can be published on your partner's website.

As with any strategy, be sure you set clear goals for what you want to get out of your content marketing efforts, identify specific audience groups you want to reach, and decide what actions you want them to take. Don't forget to collect data and track your progress. You can use these insights to understand which content topics—and even which formats—your audience finds most valuable.

Remember that combined efforts of various activities over time will bring results. Seeing additional engagement online requires dedication and periodic reviews to reflect on what has been particularly successful. Creating an editorial calendar for all your digital efforts can be helpful when coordinating a team from differing departments or roles.

Benefits of Content Marketing

Providing relevant content can help you position your organization as:

- A helpful friend
- A trusted authority
- An influential thinker
- A reliable performer
- An innovative changemaker

By the Numbers

92% of you use content marketing but only 25% have a documented content strategy. (Source: Content Marketing Institute)

Ways to Deliver Content

Here are a few examples of the forms that content marketing can take:

Blog posts
White papers / e-books
Video
Infographics
E-newsletters
Webinars
Interviews
Events
Templates and samples
Podcasts
Original research / reports
Checklists
Memes
Interviews
Predictions or summaries
Guides or how-tos
Illustrations or photo essays
Quizzes
Case studies
Opinion posts

Roadside Assistance

Epic Content Marketing,
Joe Pulizzi, 2013

Content Marketing for Nonprofits,
Kivi Leroux Miller, 2013

Content Marketing Institute

GUERRILLA MARKETING

"Guerrilla marketing" uses fast, unconventional methods, often combined with a sense of humor, to accomplish conventional goals.

The Element of Surprise

Guerrilla marketing offers the irresistible combination of being inexpensive and innovative, which can lead to enhanced media visibility and word-of-mouth advertising. By embedding messages within a surprising medium or unexpected context, you challenge expectations and your audiences become more open to hearing what you have to say. It's all about thinking up creative ways to reach them and to move them to action quickly, whether it's making a donation, signing a petition, or attending an event.

The best guerrilla tactics not only reach your target audience, but also create buzz about your marketing campaign, your cause, and your organization. The more inspired your approach, the more likely you are to draw media coverage and public interest.

Here are a few examples of guerrilla marketing:

Strategist Andy Goodman once used a mock funeral procession of five hearses on a freeway during rush hour to help an alliance of environmental organizations communicate with concerned citizens in Southern California. Each hearse had a billboard with a message about the health problems associated with air pollution in the region, and the last hearse included a toll-free hotline number at the Environmental Protection Agency. "Tens of thousands of commuters saw the 'Hearses on the Highway' firsthand as they crept along with drive-time traffic, and millions more heard the story on morning radio or saw it on the local evening news programs," recalls Goodman. "Within a 24-hour period, calls to the EPA hotline from irate Angelenos demanding cleaner air spiked 47 percent. The total cost of the tactic: less than $2,000."

In Maine, the Salvation Army worked with a group of local businesses to get free advertising, all reminding people that "The less we spend on advertising, the more we spend on people." A local pizza restaurant placed messages on their boxes, a coffee shop stamped coffee sleeves with the message, and bars and restaurants soaped their windows with the organization's familiar shield. The total cost to the Salvation Army for this campaign? $0. And the message—that the organization spends more on people in need and less on administrative costs—was directly in line with their brand.

Some Common Guerrilla Tactics

- Print your key messages on buttons, T-shirts, bar coasters, banners, employee uniforms, decks of cards, flyers—you name it.
- Many businesses use "wheat-pasting" posters on construction sites to spread news of upcoming movie and music releases. Why not use them to spread messages about your organization?
- Turn your vehicles into movable billboards with car magnets, bumper stickers, or hand-painted messages.
- Paint a mural on the side of your building or create window displays highlighting your organization. Or ask if you may paint or post your message in the windows of community businesses.
- Hold a contest to draw new constituents to your organization.
- Increase visibility for your nonprofit by speaking at community meetings, at other gatherings such as conferences, or door-to-door throughout the community.
- Display your materials at trade shows, via doorhangers (left at people's homes in your target area), and in all of your facilities (through "take-one" boxes or periodical displays).
- Produce an infomercial.
- Include key messages on your voicemail system and on-hold programming on your phones.
- Spread positive word-of-mouth through your volunteers, employees, donors, and student interns.
- Assemble trained "street teams" to go out into the community and share information about your organization or a particular initiative.
- Consider "culture jamming"—subverting a familiar logo or advertising campaign for your own purposes. While you may want to consult with your attorneys before starting a campaign like this, their edgy nature means they often get a tremendous response.

By the Numbers

Thinking creatively was rated a 9 out of 10 for importance in communications work.

(Source: *The Communications Network Research Report*, 2017)

Guerrilla marketing is a great opportunity to let your brand personality shine through.

Influencer Marketing

In recent years an entire industry has cropped up around reaching new audiences through “influencers.” And it’s not just big corporations that are benefitting from an influencer’s reach and endorsement. Whether they have risen to prominence thanks to a blog, YouTube channel, or other social media platform, influencers can help put your mission and services in front of thousands or even millions of people. As with any partnership, make sure an influencer’s brand, values, and actions are a good fit for your organization. Do your homework to make sure you want your organization’s reputation associated with this person.

Here are four tips for nonprofits who are looking to leverage influencer marketing:

1. **Ensure the influencer is genuine and truly cares about your cause.** Find influencers who have a personal connection to the topic and build relationships, not transactions with your influencers. If you and your influencers have a shared vision, the work becomes less about a marketing tactic and more of an authentic, collective dialogue.
2. **Try each other out.** Work through a probationary or test period with an influencer to help this person really get to know your organization and give both parties a chance to ensure the partnership is a good fit.
3. **Focus on the messages that resonate.** Understand what types of audiences follow this influencer and what aspects of your organization’s work are most meaningful to your influencers. Then tailor which messages each influencer is amplifying based on those preferences and connections.
4. **Be transparent.** For any creative content that highlights the partnership between your organization and the influencer, be honest about the relationship.
5. **Set clear expectations.** Some influencers will want to be paid for promoting your cause or content.

Source: Forbes Nonprofit Council, 2018

What Is an Influencer?

An influencer is an individual who has the power to affect purchasing decisions of others because of his or her authority, knowledge, position, or relationship with his or her audience. An influencer could also be someone who sits in a particular niche market who has a following in that market.

Source: Influencer Marketing Hub

An influencer has a highly engaged audience who trusts his/her recommendations. Partnering with an influencer gives your cause access to that reach and trust.

Roadside Assistance

Digital Influence, Joel Backaler, 2018

Guerrilla Marketing for Nonprofits, Jay Levinson, 2010

EVENTS

Events can help you increase your visibility, attract prospective donors, improve community relations, and thank existing donors.

Planning Your Event

Events can be a powerful way to connect with audiences through shared experience, but they are also extremely labor intensive and expensive. To ensure your organization gets the maximum benefit out of this opportunity, start with an event plan that outlines the purpose, goals, expectations, and key audiences.

Whether your event is a black-tie dinner, a conference for 1,000, or an intimate reception or lecture, know the potential costs before you commit. Are there other ways to achieve the same outcomes? Could a virtual event achieve your goals?

If you decide an event is for you, seize this opportunity for relationship building through face-to-face connection.

Get Started

Get the motor running with the **Event Planning Checklist** at causecommunications.org/toolkit.

By the Numbers

82% **of you organize special events.** (Source: Nonprofit Research Collaborative)

Leveraging the Impact of Your Events

Take note of these event best practices to position your organization for success.

- Brief your CEO, board of directors, and key volunteers on what you hope to accomplish by their interaction with VIP guests. Provide background information on important attendees.
- Choose your speakers strategically and plan well in advance for maximum publicity before, during, and after your event.
- Use your key organizational messages to create talking points for informal conversations with VIPs and for media interviews.
- Arrange your seating plan strategically. Who should sit with which donors? With media? With other VIPs?
- If the event is newsworthy, pitch the story to your key media contacts and send out a media advisory. Have press kits ready and be sure to make the appropriate arrangements such as making b-roll footage available or having interviewees prepped and on-hand if you anticipate broadcast coverage.
- Provide "for more information" cards to help build your database. Be sure to ask for email addresses so you can capture contact information for all your guests and follow up with them in the future.
- Conduct a dress rehearsal before and a debriefing afterward, to get everything right this time and to do an even better job next time.
- Follow up after the event by sending guests links to photo albums, speech highlights, press clippings, etc., along with a thank-you for attending. Don't forget to follow up with those who could not attend.

Speechwriting Tips for You or Your Keynote Speaker

Follow these best practices to ensure you're podium ready:

- Find out as much as possible about your audience. Are they new to your organization or are they longtime supporters?
- Know your objective. Do you want to educate, motivate, inspire? What is the key message you want to impart?
- Make sure your goals and audience expectations mesh.
- Does your speaker prefer a fully written speech or bullet points to use as a guide?
- Keep your remarks short and focused and use repetition to make your main message crystal clear.
- Tell a story. Paint a picture. Make it memorable.
- An effective presentation needs a beginning, middle, and end—take the listener through a logical progression as you develop and convey your message.
- Include a pronunciation guide for difficult names.
- Practice, practice, practice. Make sure your speaker has ample time to get comfortable with his or her remarks prior to the event.

Livestreaming Events

Increasingly, it's becoming more common for organizations to broadcast their events online using a livestream. Incorporating a live video strategy into your gala, seminar, or summit could broaden your audience beyond your "usual suspects"—not to mention provide a chance to participate for those who otherwise can't attend in person.

To make the most of the opportunity, plan ahead and strategize around how to best engage your virtual audience before, during, and after the event. This includes promoting the livestream in advance, taking advantage of chat features to ask and answer questions while the event is taking place, and following up to thank your virtual attendees and give them additional ways to get involved with your organization. Don't forget to record the livestream so you can enable access for even more people afterwards.

Star-Struck or Star-Stuck?

Celebrities can spotlight your cause or make you pull your hair out. Strategist Andy Goodman (thegoodmancenter.com) reviews the rules of "celebrity engagement":

- Find the right celebrity for the right cause—make sure the star is a good fit for your cause.
- Find the right person to speak with—agent, manager, publicist, attorney, spouse.
- Make your request clear, concise, and in writing.
- Have celebrities speak as informed citizens, not experts.
- No surprises. Nothing fouls a relationship faster than a deviation from the agreed-upon plan.
- Thank you, thank you, thank you. After the celebrity's time has been donated, thank-you notes (or gifts) are in order for both the star and the handler.
- Be careful. Celebrity spokespersons bring their own set of risks. They can eat up time and require careful attention.

Engage attendees before, during, and after the event.

Roadside Assistance

The Charity Event Planning Guide, David Mirisch and Godfrey Haris, 2012

Event Planning: Management and Marketing for Successful Events, Alex Genadinik, 2015

MEDIA RELATIONS

One of the fastest ways to build awareness of your organization among mass audiences is by obtaining press coverage.

Planning for Media Outreach

"Earned" media—placing news and feature stories in print, broadcast, and electronic media—is more credible and less expensive than paying for advertising. True to its name, you have to earn that coverage by investing time and effort—and even then, you'll only have limited control over how your message will be delivered once it's published.

As you begin planning your media relations effort, know what you want to accomplish and whom you wish to reach. Do you want to increase the general visibility and reputation of your organization? Do you want to attract new donors and volunteers? Do you hope to change the way your issues are framed? Your goals should be realistic and clearly defined.

Next, you need to ask yourself: "Who can help my organization achieve its goals?" and "What kinds of media do they listen to, watch, or read?" Most media outlets maintain extensive demographic information about their consumers that they use to boost their advertising sales. This information is readily available—often online—and also can be used to prioritize among the news media that reach your key audiences for purposes of news and feature pitches.

While national media and your local daily newspaper reach wider audiences, it's often more effective for nonprofits to target community-based and niche media. Sometimes these smaller news outlets allow you to reach your key audiences with greater precision and efficacy, and time spent on national publications isn't well utilized if your entire audience is local.

Media DOs & DON'Ts

DO:

- Make sure your story is newsworthy or, if it's a feature story, that it is interesting and appropriate for the outlet. Tailor your pitch.
- Be sure your spokespersons receive adequate media training, are clear about the messages they are to deliver, and stay "on message."
- Develop an internal policy for how your organization will respond to calls from the media and share this with all staff.
- Introduce yourself long before you need to pitch a big story. Make sure you know the reporter's work before you meet up.
- Return phone calls in a timely manner; reporters are on a deadline.
- Make it easy for the media to reach you.
- Ask for clarification if you don't understand a question.
- Be as helpful as possible, even if you must defer to another expert. Reporters will appreciate your assistance and will be more likely to call you in the future.
- If you don't know the answer, ask what their deadline is, say you'll get back to them, and be sure to follow up by then.
- Offer feedback when appropriate. If a story contains a major error, bring it to the reporter's attention. If you like a story, send a thank-you note.

DON'T:

- Ask to review or approve the story before it is published.
- Say "no comment" or ignore a reporter's request. It makes you sound as though you have something to hide.
- Ask to speak off the record. Presume what you say is on the record.
- Contact more than one reporter or editor at the same news organization about the same story without letting them know.
- Schedule a press conference or media event unless you have news that warrants significant coverage.

Understanding the Media Landscape

Today it seems like there's an endless number of options when it comes to how and where we get our news and information. From the types of publications to the preferences of target audiences, the media landscape is constantly changing. The Pew Research Center is a great resource to help you get your bearings and understand which trends are most relevant to your organization's media goals. Since 2004, Pew has issued an annual report that provides a snapshot of the various sectors within the U.S. news media industry. You can find the latest factsheets at **pewresearch.org/topics/state-of-the-news-media/**

KEY TERMS:

Public Relations—includes media, community, government, and donor relations.

Media relations—specifically refers to working with print, broadcast, and electronic media.

Get Started

See a **Cost-and-Benefit Chart of Select Media** at causecommunications.org/toolkit.

Accelerate Your Learning GO

Steer your media communications in the right direction with our Bite-Size Course, **How to Get Better Media Coverage** (causecommunications.org/tools).

By the Numbers

Almost half of you report that writing op-eds or letters to the editor are an important element of successful communications for your organization.

Components of a Media Relations Plan

Goals

Target audiences

Key messages

News hooks/pitch angles and corresponding timeline

Media contact/distribution list

Deliverables (press kit, releases, op-ed articles, etc.)

Media training

Tracking coverage

Pitching the Right Media

When building your media list, it's important to start by identifying which target audiences you want to reach through media coverage. Narrow it down: Do you want members of a specific community or neighborhood to see the news? Are you trying to attract more young adults to your cause? Identify which media outlets are read by those specific audiences.

Keep in mind that it can be more effective to place a story in a smaller, niche publication or blog precisely because it attracts the types of readers you're trying to reach. For example, if you want to build support for an advocacy campaign about the rights of same-sex couples, make sure your media list features LGBTQ publications. Trying to increase the number of Spanish-speaking volunteers at your organization? Check out local in-language publications.

Tracking Your Coverage

Keep a record of your successes. You may need assistance in the collection of media coverage, especially for broadcast pieces—they can disappear quickly. The Internet provides many tools for tracking coverage at a basic level, and volunteers and interns can also help. For starters, set up free Google Alerts for your organization. Be sure to track the name of your organization, key leaders, the names of campaigns or initiatives, and the titles of reports you publish. A clipping service, while expensive, provides a much more comprehensive level of tracking and often comes with a wide range of options for organizing and analyzing your coverage data.

Become a Media Consumer

Start building relationships with media by consuming media yourself. Watch TV news, listen to the news radio stations, follow reporters on Twitter, and browse news websites and relevant newspapers and magazines. Take note of the media outlets and reporters who cover the issues related to your cause. Check out which outlets cover your partners and competitors. Google News can help you locate recent news stories on issues relevant to your organization. If your budget permits, you can also invest in a subscription to news archive databases.

Reaching Affinity Groups

Media associations offer comprehensive listings of ethnic print, broadcast, and electronic media organizations in the United States, including:

Asian American Journalists Association, **www.aaja.org**

Native American Journalists Association, **www.najanewsroom.com**

National Association of Black Journalists, **www.nabj.org**

National LGBTQ Task Force, **www.thetaskforce.org**

National Association of Hispanic Journalists, **www.nahj.org**

Checklist for a Media-Friendly Website

To maximize media coverage, make your website a one-stop shop for information about your organization:

- Clear direction for media on your homepage
- Media contact person with email and phone number
- Basic fact sheets on your organization and your cause
- Biographies of experts and their given issues or topics, including video clips
- News archives
- Press clippings
- Other relevant information to increase your value as a news source

Roadside Assistance

Strategic Communications for Nonprofits, Bonk, Emily Tynes, Henry Griggs, and Phil Sparks, 2008

Public Relations Society of America

PITCHING YOUR STORY TO THE MEDIA

To implement your media plan effectively, you must actively cultivate relationships with reporters and editors, pitch the right stories to the right people, and become a valuable source for trustworthy information.

What Stories to Pitch

Editors need good stories as much as organizations need media coverage, but the two may differ in how they define a "good story." With newsrooms shrinking from budget cuts and consolidation, finding a reporter to cover your story can be difficult. But it also means that the reporters who remain need more help, and becoming a trusted source for one or more of them can mean your organization's views are regularly covered. Media almost always respond to communications pros who show creativity, are up to date on current topics, and know the reporter's respective coverage/beat. Theirs are the pitches that make it to the top of the inbox and have a lasting impact.

To position your organization as a valued news source, it's essential to pitch only stories that are truly newsworthy and a good fit with the media outlet. For instance, you wouldn't pitch a story on the shortage of affordable housing to a health care reporter (unless, of course, you found a great angle, such as unsanitary or dangerous living conditions in inner-city housing). Be objective: If you were not involved in your cause, would you find the story interesting?

Don't succumb to internal pressure to pitch stories that are not newsworthy. Not only will the story be turned down, but you'll also run the risk of damaging your relationship with the news outlet. While a million-dollar gift or new website may be a big deal to your organization, it's not inherently newsworthy.

Familiarize yourself with the media in which you want to appear and think creatively about potential news angles and hooks. What makes your story worth telling now? Are you releasing a new report? Informing the public about a new program or service? Publicizing the local impact of a national court decision, new law, or national news event? Get creative with identifying new ways to bring attention to your organization, but always stay focused on why you want coverage and the broader goals you're trying to achieve as a result.

Accelerate Your Learning GO

Check out our Bite-Size Course, **How to Get Better Media Coverage for Your Cause**, for a step-by-step guide to successful media relations (causecommunications.org/tools).

Get Started

See our complete **News Release Guidelines** at causecommunications.org/toolkit.

Which Reporters and Editors to Pitch

Most media outlets post contact information for their editorial staff and some include specific instructions on how to pitch a story.

In some instances, you'll want to pitch your story to the reporter who covers your "beat." One of the best ways to get a reporter's attention is to reference a relevant recent story and then draw a connection between that story and the one you're pitching. With the reality of shrinking newsrooms, many reporters are now covering multiple beats, which might help you to pitch an interesting or unexpected angle on your story.

Sometimes the best approach is targeting the editor of a specific section, such as the calendar section for events that are open to the public or the features/lifestyle editor to profile a local family your organization has helped.

You may already have an "in" with the media that you're not aware of. Have you asked your volunteers or board members if they have friends in the media? Chances are they do. Ask around and then leverage these relationships as much as possible. Remember that reporters are people too, and taking a journalist out to coffee, calling or emailing with praise for a story you liked, or being helpful with background information even when there's no direct benefit for your organization can all help you build relationships that lead to coverage in the future.

The best way to get your story covered is to reach out and pitch reporters or editors directly, but when to reach out? In this era of the 24-hour news cycle, it can feel like stories are published instantaneously. Don't let this be an excuse to throw strategy and respect out the window. Give reporters and editors enough notice to be able to do a great job producing a story. Keep in mind that different types of outlets—and types of stories—require more or less lead time. A human-interest profile in a monthly magazine, for example, will require more time to secure, develop, and produce than an op-ed on a topic already making headlines.

By the Numbers

78% of you say seeking media coverage is important to accomplishing your organization's goals.

Stay in front of media targets with a steady drumbeat of useful content. Even when you don't have breaking news, think of ways to stay in touch and remind them of your resources.

Building a Media List

Develop a list of your top media targets. They should include reporters who have already covered your organization, reporters who have covered your competitors/partners or issue area, and those reporters or media outlets that you believe should be covering your cause. This list will evolve over time as journalists move beats and new outlets surface, so make sure to update your list on a regular basis. Because there are so many more freelancers providing important coverage these days, if you see a worthy story related to your topic, capture as much information as you can about the reporter. Don't be afraid to write the reporter a friendly note asking for information. Twitter is also a great resource for identifying journalists and gaining a better understanding of how your issue area is currently being covered.

Pay services are available to supplement your efforts or to help you develop an entire media database from scratch. It's common for media monitoring companies to also offer outlet databases, so if you're interested in both, research how bundling these services can save you money. It pays to comparison shop and to verify that the company's database includes key outlets you already know are relevant to your organization. Make sure nonprofit industry publications or niche media related to your cause are tracked in the database, as well as digital platforms like blogs, podcasts, and social media.

If you choose to build and maintain a media list of your own, set up regular checkpoints throughout the year to ensure your information is current. Add to your list every time an outlet writes about your organization and track journalists as they move from publication to publication.

Types of Media Outreach

Securing media attention for your organization is never a one-size-fits-all strategy. Pursue coverage based on the type of content and the format that best aligns with your goals. This is also a great way to reach your target audiences in a variety of ways or to reach a variety of target audiences. Here are a few of the most common approaches and options for getting coverage:

Press Release—Announces a newsworthy achievement, statement, or resource; presents a clear narrative in the way you want the story to be written. Should always be accompanied by a tailored email pitch. Can also be a tool for creating a historical record of your organization's key milestones.

Media Advisory—Calls attention to upcoming events, news conferences, or briefings; serves as an invitation with basic information about the event and why it merits coverage. Send media advisories out the week before your event and again one or two days before as a reminder.

Email Pitch—May or may not be accompanied by a press release; should always be tailored to the reporter you're contacting. Make the case for why this story matters and how it's relevant to the audiences that read this publication. Use an email pitch for a wide variety of story ideas, from traditional articles and feature stories to profile interviews and podcast episodes.

Op-ed Article—An opinion piece that highlights an issue, value, or action that is important to your organization; showcases the unique voice of the author and is usually limited to around 750 words. Op-eds should not come across as promotional, and the editor you're pitching must agree that the topic area is relevant and timely.

Letter to the Editor—A brief and persuasive response to a specific article recently published by an outlet; typically underscores, builds on, or refutes an argument made in the original article. A good option when you want to make your organization's stance on a particular issue clear but requires a quick turnaround.

3 Tips for Developing Relationships With Media

1. Position yourself or others within your cause as experts
2. Stay in contact with relevant reporters
3. Make your website media friendly

Roadside Assistance

Media Relations Handbook for Government, Associations, Nonprofits, and Elected Officials, Bradford Fitch and Jack Holt, 2012

PR Newswire

DONOR CULTIVATION AND GRANTS

Successfully raising funds brings together all the tools you've acquired along the way—a strong communications framework, a diverse group of tactics, and awareness of your cause through events, media coverage, and advocacy.

Communications to Support Development

At its best, a communications team functions as a strategic partner to all other departments in your organization. Nowhere is that truer than with development. Communications and development already share the goal of engaging audiences and building lasting relationships with them. Working together, you can achieve this goal faster and more effectively.

One of the most powerful ways you can support your development colleagues is to help them craft strategic, targeted messages that resonate with current and prospective donors. But your impact as a communications partner doesn't stop there.

With so many causes and so much clutter in today's fast-moving world, it takes steady communications and creativity to reach new audiences so they can hear about, become interested in, and eventually support your cause.

The following communications activities can complement the fundraising strategies already in place at your organization and contribute to a collaborative approach between development and communications efforts.

- Proactively be seen and heard. Consistently make your cause's work visible in the community.
- Encourage current supporters to share why they care about your cause. Add these testimonials to your storytelling efforts.
- Create your own coverage and position your organization as a trusted leader. Post articles on your blog or social media channels that highlight your expertise or relate your cause to current topics and emerging issues.

Writing Effective Grant Proposals

Whether you're writing to an individual donor, a foundation, or a corporation, keep the following tips in mind as you prepare your proposal:

- Plan as far in advance as possible so that appropriate time is available for research, writing, editing, approvals, revisions, and formatting.
- Look at priority projects that have yet to be funded and begin the process of developing boilerplate proposals. The boilerplate can then be tailored for individual prospects as they are identified.

Accelerate Your Learning GO

Get back to basics with our Bite-Size Courses **How to Attract New Donors** and **How to Maximize Donors** (causecommunications.org/tools).

- The prospect will determine the tone and focus of the proposal. Tailor the emphasis based on the funder.
- Foundations generally provide clear guidelines for the proposals they will accept and the format, structure, and contents they require. Follow them!
- Every proposal should be highly readable, well organized, persuasive, substantive, and error free.
- A proposal should be both concise and complete. Lead the prospect in a logical order through the rationale for support.
- Let the donor know the difference the gift would make—to the organization, to the beneficiaries of your mission, and, most important, to the donor.
- Remember that money goes to strength. Instead of writing about needs and problems, discuss opportunities and potential.

Seven Thank-Yous

When it comes to donor relations, the fundamental rule is that you can't say thank you often enough. Work in partnership with your development team to craft meaningful acknowledgments and updates.

Following are seven golden opportunities for thanking donors:

- Thank-you note with an enclosed photo following an event
- Thank-you letter following a one-on-one meeting, visit, or lunch
- Thank-you call after the donor makes/pledges a gift
- Thank-you letter officially acknowledging every gift
- Listing the donor's gift in your honor roll (after obtaining permission)
- Periodic reports on how the gift is being used
- Profile of the donor in your newsletter or online (with approval)

Help your development colleagues attract and retain donors through targeted messages aimed at their individual motivations for giving.

By the Numbers

1/3 of you reported you do not regularly track donations as a way of assessing communications.

Online Giving Campaigns

In addition to having donation pages on their website, many organizations are experimenting with donation campaigns that leverage the latest in peer-to-peer fundraising and crowdfunding platforms. These campaigns are a great opportunity to apply your organization's core messages in a creative and fun setting.

Roadside Assistance

Two Sides of the Same Coin, M.K. Richardson, Nonprofit PRO, 2017

The Generosity Network, Jennifer McCrea, Jeffrey C. Walker, and Karl Weber, 2013

The Only Grant-Writing Book You'll Ever Need, Ellen Karsh and Arlen Sue Fox, 2014

Winning Grants: Step By-by-Step, Mim Carlson, 2013

GrantSpace

CAPITAL CAMPAIGNS

If you decide to embark on a capital campaign, you'll need to make an investment in communicating to major donors, prospective donors, key volunteers, staff, and the media—as well as local decision makers.

Fundamentals of Capital Campaign Communications

To understand what will motivate audiences that will contribute to a capital campaign, it is essential that you conduct a feasibility study before launching a campaign. Typically, external fundraising counsel conducts this in-depth assessment of an institution's readiness and fundraising potential. This feasibility study will help determine and test your campaign's financial goals, priorities, and key messages. Research on potential funders can help you identify new donors and help target your outreach.

The case for support, sometimes called a "case statement," is the fundamental blueprint for marketing your campaign. It literally "makes the case" for why donors should support your campaign. The process of developing your written case also helps build consensus internally on the campaign's priority projects, key messages, and ultimate goals—financially and institutionally.

And remember that publicity too early in your campaign can undermine your progress. Don't officially announce your campaign effort until at least one-half of your financial goal has been pledged by donors. This allows you to launch with positive news and to demonstrate strong momentum toward the ultimate goal.

Ask Your Donors

Conducting focus groups of prospective donors can provide you with valuable feedback for your case statement while also achieving buy-in for your campaign concept and its priorities. Donors can tell you directly what would sell them on the campaign, and that's a great cultivation tool as well as a means of targeting and fine-tuning your communications.

Producing an Effective Case Statement

Capital campaigns—like all fundraising campaigns—must be grounded in a compelling "why." Make a compelling case for why your organization is a smart investment. How will donor funds be used? What meaningful difference will donor gifts make?

Think big. What significant societal issues will donor support help influence? Why is your organization uniquely qualified to successfully address these issues?

Aim to win both hearts and minds. Evoke an emotional response in your reader but provide logical rationale for supporting your institution as well.

Include a call to action. To be effective, a case statement should have a sense of urgency. Why is donor support needed now?

Avoid hyperbole. By all means make bold statements about your institution's strengths and vision, but back up your claims with evidence.

Demonstrate existing support for your organization by featuring testimonials from constituents and other donors, and/or by listing your board of directors and campaign leadership, particularly if they are well known and respected in your community.

Focus on what might motivate a donor to give, not on your organization's needs.

Make sure your printed case is visually appealing. Invest the necessary resources for photography, design, and printing. The case for support does not have to be expensive, but it must reinforce your point that the campaign is a smart investment.

Tailor the format of your case for support to suit your institution's personality, history, mission, campaign goals, and the donors you aim to reach.

Include a list of giving opportunities, large and small, to motivate donors and show specifically where they might make an investment.

By the Numbers

The number of nonprofits conducting capital campaigns has increased 34% in recent years.
(Source: *Nonprofit Research Collaborative Fundraising Survey*)

Key Campaign Communications Vehicles

Case for support

Newsletter

Video

Website

Brochures on planned giving, endowment, featured priorities, etc.

Graphic-identity program (logo and other visuals) specific to campaign

Press releases about major gifts

Campaign press kit and fact sheets

Events (campaign kickoff and completion celebration)

Scripted remarks

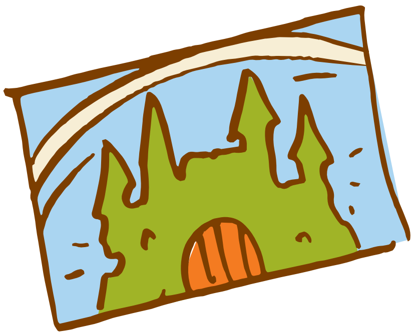
Roadside Assistance

Capital Campaigns, Andrea Kihlstedt, 2016

Preparing Your Capital Campaign, Marilyn Bancel, 2008

DIRECT MAIL

Direct mail puts your targeted message directly into the hands of your audience, reminding them that you need their continued support and driving them to take action.



The Enduring Value of Direct Mail

In addition to its importance as a fundraising vehicle, direct mail can help you build awareness through informational mailings about your organization. It can drive traffic to your website, inform constituents of a new service, educate your audience about current issues, and much more. Direct mail is used primarily to acquire new donors, renew and upgrade existing donors, and identify planned-giving prospects. It is also effective for special efforts, e.g., to raise funds for specific programs or projects over and above your annual appeal to donors. While email appeals have become an increasingly important part of many nonprofit organizations' fundraising, there is still a place for a printed appeal.

According to Grizzard Communications, an 84-year-old firm that specializes in direct-mail fundraising, 40 percent of your direct-mail success depends on how well you know your audience; 40 percent depends on what you say to them; and the remaining 20 percent depends on how your mailing looks.

Conducting audience research will help you address the first point. For the second issue, it's important to keep in mind why people make philanthropic gifts. Grizzard boils it down to these reasons: "kindness, a sense of altruism toward others; conscience, the desire to make our world a better place; tenderness, empathy with the poor and disadvantaged; obligation, the perceived duty to share one's abundance; and personal gratification, a sense of 'feeling good' because they have done something significant to help others." Your appeal should evoke an emotional response in your readers, with a hook that moves them to immediate action.

To make your direct-mail appeal inviting, so that donors will open and act, rather than discard it, it's important to test your design with a small segment of your audience before mailing to large numbers.

Accelerate Your Learning GO

Learn more about maintaining a strong database with our Bite-Size Course, **How to Manage Your Contacts** (causecommunications.org/tools).

Direct Mail DOs & DON'Ts

DO:

- Pay attention to detail. If your direct-mail piece is accidentally addressed to "Mr. Jane Smith," she may find it difficult to read and absorb your message no matter how compelling it might otherwise have been to her.
- Invest time in maintaining your database with up-to-date information on your donors; remember that the Postal Service's National Change of Address data can help with this.
- Include a call to action that is specific and immediate.
- Use an emotional hook to draw in your reader, keeping in mind the principal reasons people give to charitable causes.
- Personalize your appeal rather than simply addressing your direct mail to "Dear Friend."
- Give donors the option of responding to your direct-mail letter with an online gift.
- Make sure your direct-mail content is consistent with the rest of your organizational identity and messaging.
- Carefully follow relevant postal regulations.
- Think about how direct mail is part of a coordinated strategy with other communications—email, social media, etc.

DON'T:

- Make your direct-mail program a sporadic undertaking. Existing donors need to be reminded frequently that you need their ongoing support.
- Make solicitations your only form of communication with your donors. Send informative materials, such as an e-newsletter, in addition to your periodic requests for funding.
- Neglect to test your direct-mail appeals before you commit to a mass mailing. Testing helps you fine-tune your approach for greater results.

Attracting Planned Gifts

Direct mail is an excellent vehicle for educating your constituents about the benefits of a planned gift to your organization. Planned gifts make it possible for many donors to have a larger impact philanthropically than they could otherwise afford. And because planned gifts typically offer significant benefits to both the nonprofit and the donor—such as lifetime income and a variety of tax savings—response to direct mail is generally strong.

You might want to consider mailing a brochure on planned giving overall—or on specific areas such as charitable gift annuities or bequests. Other options include adding a column on planned giving to your donor newsletter, sending out a postcard directing donors to a planned-giving website, or writing a targeted appeal letter to all donors and prospects 60 and older. The best planned giving prospects will give small gifts over a long period of time.

Maintaining an Accurate Database

Your database can be your biggest headache or your greatest resource—and it's sometimes both! It's crucial to accurately compile and update your donor names, addresses, salutations, email addresses, and other vital information. You can capture details on prospective donors by making "for more information" cards available at your events and in your facilities.

Your database should also include the amount and dates of gifts, the events donors have attended, the mailings they have received, corporate-matching gift programs, and any outstanding pledge payments that remain and when they are due. By getting the basics right, you reassure donors that your organization is professionally run and that you care about them. If donors must keep reminding you that they moved three years ago or that they've already completed a pledge, their confidence in your nonprofit may be eroded. The U.S. Postal Service also maintains a national Change of Address registry, which you can access through mailing houses (or directly if your list is large enough).

A variety of database software packages and services are on the market, many of which are tailored for nonprofits. Ask peers and colleagues what type of program they use and what their experience has been with the software. Shop around. Take time to evaluate the kind of information you need to track for your nonprofit and choose the software that best fits your specific needs.

By the Numbers

On average, nonprofits communications teams are sending 2 print newsletters and 3 print appeals each year. (Source: Nonprofit Marketing Guide.com, 2018)

Roadside Assistance

Fund Your Cause with Direct Mail, Benjamin Hart, 2010

Alliance of Nonprofit Mailers

ADVOCACY COMMUNICATIONS

Even if your core mission is not advocacy, policies impact all organizations so it's worthwhile to think of policymakers as one of your audience groups.

Understanding Policy's Connection to Your Cause

Shaping public opinion about your cause and influencing legislation remain among the most challenging tasks facing nonprofit organizations. Legislation and court decisions relating to health care, social services, the environment, minimum wages, human rights, and a thousand other topics profoundly affect mission-driven organizations and the types of charitable services that society needs.

Depending on the scope of your issue, it may be important for you to reach out to elected officials locally, regionally, and nationally. Keep policymakers informed about your organization and aware of the key issues facing your communities. Determine which of their aides handles the issues that are important to your cause, and then build a relationship with them.

Find out when government agencies and legislators are going to discuss and act upon issues of importance to your constituents. If you have a compelling story, try to arrange meetings with everyone from your local city council members all the way to top state and national officials. Make sure they know how many people your organization can reach. Build understanding and awareness of your concerns by using moments of interaction with policymakers and their staffs as "teachable" moments rather than as debates.

Writing Letters

Whether you want to mobilize constituents to write to their congress members or to draft opinion letters to your local newspaper, follow these simple steps to quickly build momentum for your cause:

- Draft a few sentences or key points about the message you want your constituents to convey to decision makers or the media.
- Spread the word about your advocacy campaign using a combination of email and social media. Give your audiences the opportunity to participate and then share the campaign with their own networks.
- Encourage participants to stay on point but to personalize their letters so they don't look like spam.

Know the Law

501(c)(3)s may:

- Engage in limited lobbying, including work on ballot measures
- Conduct nonpartisan public education and training sessions about participation in the political process
- Educate all of the candidates on public interest issues
- Publish legislative scorecards for incumbents (with certain restrictions)
- Create voter guides that compare the candidates' views on a range of issues
- Sponsor candidate debates where all viable candidates are invited and given equal time to speak on a range of issues
- Rent, at fair market value, mailing lists and facilities to other organizations, legislators, and candidates (must be available to all candidates)
- Conduct nonpartisan get-out-the-vote and voter registration drives
- Establish a controlled 501(c)(4) organization
- Work with all political parties to get its positions included on the party's platform (with certain restrictions)

501(c)(3)s may not:

- Endorse candidates for public office
- Make any campaign contributions
- Make expenditures on behalf of candidates
- Restrict rental of their mailing lists and facilities to certain candidates
- Ask candidates to sign pledges on any issue (tacit endorsement)
- Increase the volume or amount of incumbent criticism as election time approaches
- Publish or communicate anything that explicitly or implicitly favors or opposes a candidate

Note: Because the application of the law is fact sensitive and context is critical, the above guidelines should not be relied upon as legal advice. (Source: Alliance for Justice, www.allianceforjustice.org)

Online communications play an increasingly important role in advocacy campaigns. Many nonprofits have a “contact your legislator” button on their websites. An email alert can reach thousands quickly and economically. And those who become committed to your cause are likely to help spread the word through viral marketing—passing your message on to their coalitions, colleagues, friends, and family through their own networks. Is grassroots advocacy a major part of your organization’s activities? Consider investing in a software tool designed to help nonprofits create, share, and track advocacy campaigns.

Calling Legislators

Help your constituents advocate for your cause by making it easy for them to get in touch with their legislators. Include contact information in your mailings and other advocacy efforts. Go to www.usa.gov/elected-officials for contact information for the president, vice president, U.S. Congress members, and state and local officials.

Policymakers as Partners

Policymakers can be important target audiences for your organization, but don’t overlook their potential as partners. Think about how your services or resources can benefit a councilmember or representative’s constituents. What common questions or requests does this policymaker’s office receive that you can help answer? Position your organization as a resource and solution.

For example, if your organization provides free mental health services in a specific community, provide your local representatives with a resource kit or fact sheet so their offices can refer constituents to those services. It’s a win-win: the office is able to provide a helpful solution and you’re able to introduce your organization to new audiences. And best of all, more people receive needed support.

By the Numbers

Advocacy for a position or issue is a communications goal for 75% of you.
(Source: Nonprofit Marketing Guide.com, 2018)

Six Essential Steps in an Advocacy Campaign

1. Determine your goals
2. Identify and segment your audiences and understand their current perceptions
3. Craft compelling messages
4. Determine the appropriate vehicles and best spokespersons to reach each audience
5. Spell out the actions you want people to take
6. Follow up to thank participants and share results

Roadside Assistance

Alliance for Justice

Advocacy Progress Planner, The Aspen Institute

How to Create a (c)(3) Advocacy Plan, Bolder Advocacy, 2018

CRISIS COMMUNICATIONS

Planning for potential crises can prevent you from being caught off guard.

Strategic Communications in Times of Crisis

If a crisis arises, a sound and strategic response can minimize negative impact to your organization, or even transform a threat into a positive opportunity. Every crisis situation will be different, and every organization will need to respond in a way that is appropriate for them, but here are some best practices that can guide you through any bumps in the road.

- Assemble a crisis management team to brainstorm about potential crises and how your organization will handle them. If possible, prepare materials in advance.
- Designate spokespersons for various potential crises (subject matter experts—on environmental issues or public health concerns, for instance—as well as someone who could address an employee or financial scandal).
- When a crisis emerges, gather the facts and understand all relevant angles of the situation.
- Identify and evaluate your options and define success. Ensure that the position your organization takes is aligned with your mission and values.
- Communicate honestly, thoughtfully, and in a timely fashion. Any information you choose to share should be specific, clear, and consistent.
- If the situation will be covered by the media or shared by your peers, make sure your board, donors, community leaders, and other key groups hear from you first.
- Never tell the media “no comment.” If the crisis is your organization’s fault, be accountable and straightforward about how you address the issue.
- Equip your “front line” staff with instructions and talking points so everyone is clear about their roles and able to speak with one, unified voice.
- Be prepared with alternative means of communicating should your normal channels become inaccessible (for example, an earthquake destroys your web server).
- Establish partnerships with institutions in other regions that can back you up in an emergency.
- Monitor the impact of the situation and adjust your response as needed.

Planning Ahead

A crisis communications plan is a resource every organization needs (but hopefully will never need to use!). Take time to create a plan and share it with your organization's senior leadership. In addition to process-oriented information, make sure your plan always contains current contact information for all members of your crisis management team, plus any staff, vendors, and counsel that might need to be engaged in the event of a crisis.

Revisit your plan annually to make sure all of the processes and materials are up to date. Another great time to update your plan is after you've weathered a crisis. Consider the lessons learned and make adjustments that will set up your team for greater success in the future.

By the Numbers

79% of you say that the lack of established processes is a barrier to effective communications in a crisis.
(Source: Crisis Communications Survey, Klenk & Hoursch)

A crisis is a situation that threatens the integrity or reputation of your organization.

Roadside Assistance

Ongoing Crisis Communication, Timothy Coombs, 2019

Crisis Communications: The Definitive Guide to Managing the Message, Steven Fink, 2013

Top Tips

1. To reinforce your brand identity, link materials visually and express consistent messages.
2. Collect email addresses of your constituents at every opportunity.
3. Spend as much time maintaining your website as you spent launching it.
4. Choose your social media platforms based on what is right for your audience and what you want them to do.
5. Invest in advertising to quickly increase your mindshare.
6. Expand your reach and increase the value you provide to your audiences by creating and sharing relevant content.
7. Try “guerrilla” tactics to break through the clutter.
8. Use events to connect with audiences through shared experience.
9. Build credibility and awareness through press coverage.
10. Make sure your story is newsworthy, interesting, and appropriate.
11. Attract and retain donors through targeted messages aimed at their individual motivations for giving.
12. Use advocacy to get your cause on the public agenda and shift the way stories on your issue are reported.
13. If a crisis hits, turn a potentially threatening situation into an opportunity for your organization.

COMMUNICATIONS TOOLKIT

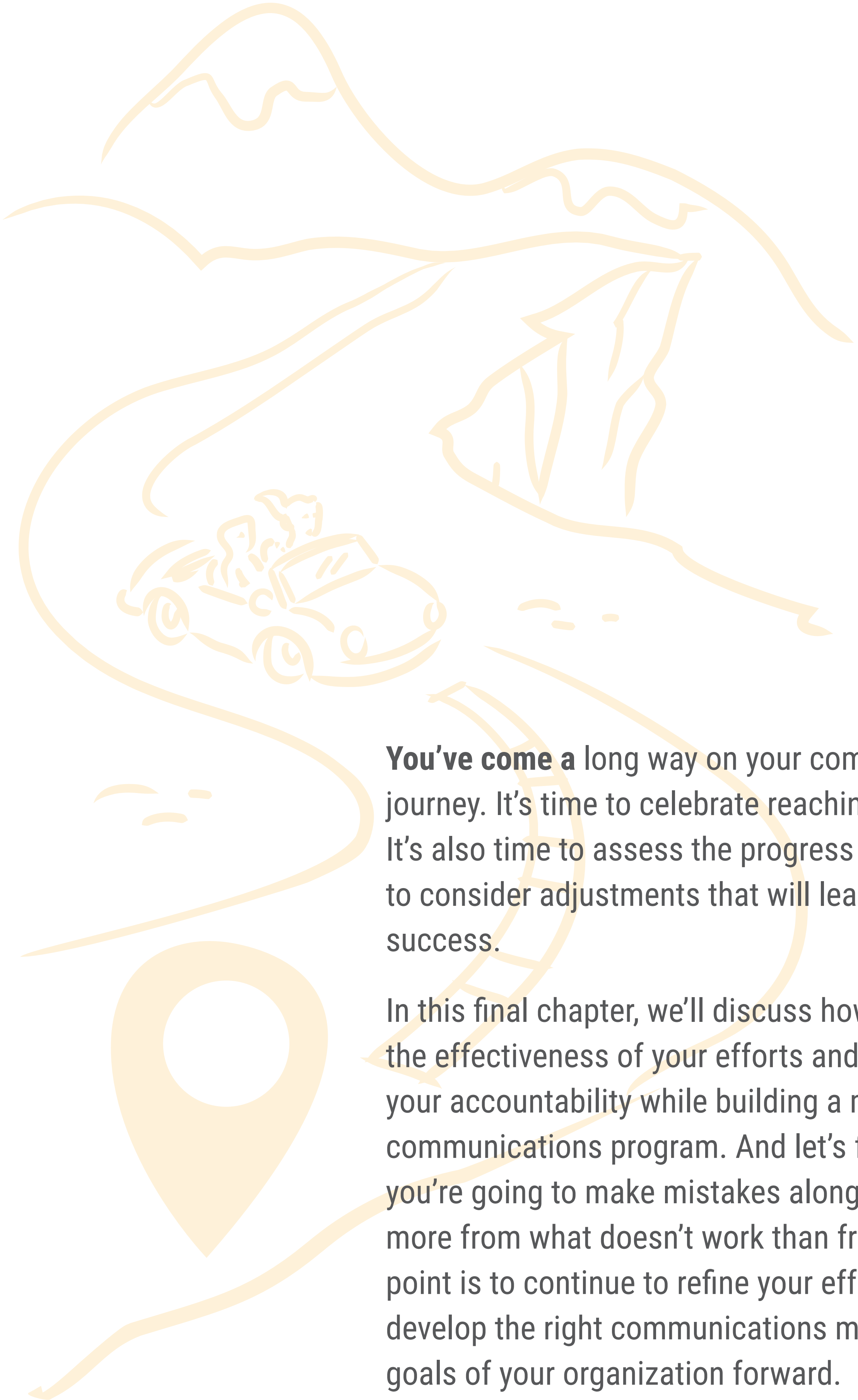
A GUIDE TO NAVIGATING communications for social impact

CHAPTER 5

Are We There Yet?

Cause Communications

Communications for Good®



You've come a long way on your communications journey. It's time to celebrate reaching your destination. It's also time to assess the progress you've made and to consider adjustments that will lead to even greater success.

In this final chapter, we'll discuss how to measure the effectiveness of your efforts and strengthen your accountability while building a more effective communications program. And let's face it, sometimes you're going to make mistakes along the way. We learn more from what doesn't work than from what does. The point is to continue to refine your efforts so that you develop the right communications mix that moves the goals of your organization forward.

Next Stop: Gauging Your Success

MEASUREMENT AND EVALUATION

All organizations should make time to assess how far they've come and explore new paths for even greater success.

Establishing an Evaluation Framework

It's important to have a plan with specific goals identified in order to measure the effectiveness of your communications program.

By quantifying the desired and actual impact of your communications efforts, you'll be able to ascertain what's working and what's not working so that you can make adjustments to your plan. You'll be able to demonstrate to your board, in concrete terms, the value of funding a comprehensive communications program. And you'll know that your efforts are making a real difference in reaching your constituents and supporting your mission because you'll have the data.

So where do you start? To know where you are now, you need to know where you began.

Establish a baseline at the outset. Before you launch a new marketing program, survey your key audiences about their perceptions of your organization. Then conduct a similar survey after you launch a new publication or advocacy campaign to measure the difference your communications made to audience perceptions.

Know your specific goals. If you want to increase major gifts from $3.5 million per year to $5 million per year, it will be much easier to measure your success than if you have a general goal of "raising more money."

Be sure to segment and test your marketing vehicles along the way. For instance, if you are planning a year-end fundraising campaign, you should try out a couple of different approaches on select portions of your audience to determine which is likely to yield a higher response rate.

Get Started

See the **Measuring Communications Results** worksheet at causecommunications.org/toolkit.

Measure your organization in comparison with your peer institutions. In a blind survey, you can find out what the media thinks of your organization and others in your sphere. Track how that changes over time as you implement new media relations strategies.

If you're creative in your approach, you can usually think of useful measures for each of your communications projects.

Limit what you measure and choose your metrics strategically. Prioritizing your evaluation efforts helps ensure you're not overwhelmed with too much data. You can also more easily track the metrics that will tell you if you are reaching your communications goals.

By the Numbers

92% of you measure your communications in some way. Analysis of website traffic and tracking the distribution of materials are the two most common.

Why Measure?

Evaluation is about looking back ***and*** looking forward. Tracking and analyzing metrics serve two primary purposes:

1. Demonstrate impact
2. Shape future strategy

Tools for Measuring Results

Here are a few ideas for evaluating specific types of communications efforts you are likely to use:

Media Relations
Beyond tracking the number of media mentions, track how often the media covering your organization are picking up your specific talking points (i.e., the key messages you include in your press releases or pitches and those your spokespersons say on camera). Is your success rate better if you have one-on-one meetings with the reporter? How often are your organization's leaders quoted and lifted up as issue-area experts? And did you receive coverage in the news outlets consumed by your target audiences?

Crisis Communications
With crisis communications, you can measure your effectiveness at preventing negative media coverage and the amount of revenue your nonprofit would have lost—from donors and other constituents—had you been unable to prevent a negative news report.

Print Publications
Audience feedback can tell you what readers think of the quality and frequency of your publications, how much of it they read, whether they pass it on to friends and family, whether it motivates them to take action or make a gift, and how well they understand your mission.

Digital and Social Media
Identify which metrics (e.g., reach, engagement, open rates, and clicks) are the best indicators of progress toward your broader communications goals and map out a reporting plan for how often you need to check and analyze the data. Because your organization is likely publishing new content often and the engagement data is immediately accessible, digital media is the perfect place to experiment.

Websites
Create a dashboard to track where people go on your site, how long they visit each page, and who is visiting. Be sure to align your metrics with the specific goals you're trying to achieve. Also, it's a good idea to track changes in outcomes—how many donors are making a gift online compared with last year? When and where did you have spikes in traffic on your site, and what marketing efforts can you attribute that to?

Outputs vs. Outcomes

Your outputs are what you produced. Your outcomes are what you achieved (as a result of your outputs).

OUTPUTS	OUTCOMES
92 articles of media coverage	Established our organization as the go-to resource for reporters writing about our cause
5 social media posts per week	Grew our engagement with teens by 300%
4 CEO speaking engagements	Strengthened our CEO's reputation as a thought leader in the field
2 new brochures	Increased understanding of the breadth of our programs
23% decrease in open rates for fundraising emails	Did not meet our online fundraising goal for current donors

Sharing Results Internally

Quantitative and qualitative data can help you show how your organization is making a difference—and that's key for external audiences like donors, volunteers, community leaders, and policymakers. But telling the story of your impact is equally important for your internal audiences. Periodic reports are a powerful tool for informing stakeholders like senior leadership, your board, and even colleagues in other departments about the progress your organization is making toward its mission. Go beyond delivering information and use achievements as the basis for refreshed talking points, so that everyone is equipped to share these successes and promote a consistent external narrative.

Additionally, your evaluation efforts provide a critical opportunity to demonstrate the value of your communications program and the work of your team. What new strategies did you try this year and how did they pay off? Did your investment in paid advertising or media spokesperson training accelerate results? If you focused on strengthening the infrastructure of your communications work, how did those new policies and processes create a more efficient and sustainable internal system? And how did that translate to growing your reach and impact? Answering questions like these can paint a powerful picture of the critical role communications plays in the overall success of your organization. Data can also help you make the case for increased budget and resources so you can continue to build on what works.

Testing and Experimentation

Test different scenarios to see how small changes can make a big impact on your results: Does a benefits-oriented headline increase open rates for your e-newsletter? Do social media posts featuring images of people perform better than a picturesque landscape photo? Just be sure to limit the variables within each test so you can more accurately pinpoint what's causing any changes in your statistics.

Roadside Assistance

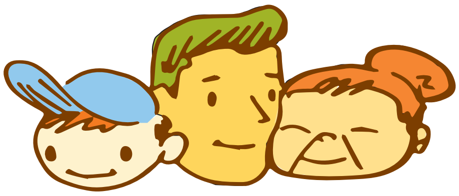
Speaking for Themselves: Advocates' Perspectives on Evaluation, Innovation Network, Inc, 2008

Are We There Yet?, The Communications Network, 2008

How to Measure Communication, International Association for the Measurement and Evaluation of Communication, 2016

REFINING AND ADJUSTING STRATEGY

No matter how thoroughly you plan your trip, sometimes you have to change course or give your strategy a tune-up. You need to stay flexible. And as you collect and analyze feedback from key audiences, you might even need to shift gears.



Staying on Track

In this book, we have covered the importance of conducting research and having a communications plan in place before you launch into implementation. It's equally important to periodically revisit your research and update your plan.

Life happens, things change. It pays to retrace your steps occasionally. It's inevitable that you'll need to adjust your communications strategy to be responsive to unexpected changes, new opportunities, and other external factors. It's just as important to proactively make refinements —and that's where evaluation data can be instrumental. Use the insights from your evaluation efforts to make decisions about which aspects of your communications strategy to keep, which to adjust, and which to stop completely. With this approach, data can be an incredibly valuable tool for planning and prioritization.

Establish regular intervals for reporting and reflection, and build in time to integrate lessons from past efforts—especially as you prepare for the new year or the launch of a new initiative. Determine where there are opportunities to try out a new approach, understand where you need to double down on existing efforts to keep your momentum going, and assess what pieces simply aren't producing the returns you need. Always have your communications goals in mind to keep your tactics focused and results driven.

It's also important to be able to respond quickly when events in popular culture or politics take a turn that can be advantageous to your organization. You have to pay attention to what's going on in the world around you and think creatively about how you can participate in the discussion to benefit your organization and those you serve.

If you're doing something that doesn't work, change it. If it works well, do more of it.

"The rearview mirror is always clearer than the windshield."

—Warren Buffett, businessman and philanthropist

The Power of Communications

A woman is driving alongside a river, looks over, and sees a baby drowning. She pulls over, jumps in the river, grabs the baby, and brings it ashore. But no sooner than has she climbed up the bank, she looks back and sees another baby drowning. She jumps back in, grabs the baby, brings it to shore, and, oh no, there's another one. She goes in after it. And then there's another and another and, pretty soon, she's busy saving babies one at a time.

A second woman passes by, sees the drowning babies, and jumps in. The first woman sees that the second woman isn't bringing the babies out of the water and yells, "What are you doing?" The second woman says, "I'm teaching the babies how to swim!"

Just then, a third woman comes by, sees what's going on, but turns around and starts running in the other direction. The other women yell, "Where are you going?" She says, "I'm going upstream to stop whoever is throwing these babies into this river!"

This familiar parable is a reminder that by using strategic communications you can get way past saving one baby at a time. In fact, you have the power to bring people together to solve some of society's most pressing problems, shifting perceptions and creating positive social change on a massive scale. Enjoy your journey.

We're taking our own advice and will be surveying our readers on ways we can improve this toolkit. We welcome your feedback and suggestions for future updates. Email us at toolkit@causecomm.org.

By the Numbers

20% of you frequently collect feedback on your communications efforts to help assess their effectiveness.

Keys to Effective Evaluation

- Set benchmarks in advance
- Establish clearly defined goals
- Segment your audience
- Test along the way
- Be creative in what and how you measure
- Use a mix of quantitative and qualitative data
- Routinely review and readjust your approach
- Be selective about what you measure

Roadside Assistance

Forces for Good, Leslie R. Crutchfield and Heather McLeod Grant, 2012

Start with Why, Simon Sinek, 2011

Made to Stick, Chip Heath and Dan Heath, 2007

Top Tips

1. You can't effectively measure where you end without first establishing where you started.
2. Segment and test along the way.
3. Understand which outputs will help tell the story of your outcomes.
4. Benchmark your organization in comparison with peer institutions.
5. If you're doing something that doesn't work, change it. If it works well, do more of it.

LOOKING AHEAD

We believe strongly in the transformative power of mission-driven organizations.

In no other sector is the power to do good greater. And we know that by improving your communications efforts, your organization will thrive, change will be made, and the world will be a better place.

As the tools and platforms we use to share our stories continue to change, data-driven and audience-focused strategies will stand the test of time. Through the years, we've helped organizations of all shapes and sizes implement the elements of effective communications outlined in this book. And we've frequently been asked to compile our experiences and insights into a resource for others who are dedicated to improving social impact communications.

You have many choices in the way you approach your work. We hope you find this book both informative and useful as you discover your own best path.

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PRAISE FOR THE 4TH EDITION

I'm blown away. The amount of experience, advice, and insight packed into this Toolkit is amazing. It's indispensable for nonprofits and should be required reading for executive directors.
—NONPROFIT COMMUNICATIONS DIRECTOR

Wow! This Toolkit is a great introduction or refresher for both the novice and the [seasoned] practitioner.
—NONPROFIT DEVELOPMENT AND COMMUNICATIONS EXPERT

The Communications Toolkit takes capacity building to a new level of excellence. It's exactly the kind of resource that helps foundations maximize their investments in grantees who are on the frontlines of change.
—FOUNDATION DIRECTOR

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