

Community Foundation of Jackson Hole

Building Sustainability for Nonprofit Organizations

**A Strategic Approach to Effective
Communications and Marketing**



NEWLEVEL
GROUP

Take The Next Step

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Building Sustainability for Nonprofit Organizations
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Welcome

Are You Building An Organization That Will Last?

A clear, compelling message is critical to sustainability. With a strong message, board development, staff development, recruiting, and fundraising are all easier and more effective. This workshop will help Board members and staff of nonprofit agencies define and clarify key messages, identify target audiences, and strategize about how to deliver these messages to raise public awareness.

Additional NewLevel Group workshops are available to help nonprofits explore each of the critical elements of sustainability in greater detail, with emphasis on the elements of fundraising, marketing, and leadership development.

Building a Sustainable Nonprofit Organization

***Sponsored by
Community Foundation of Jackson Hole***

October 18, 2007, 1:00 p.m. – 5:00 p.m.



Learning Objectives

- ✓ Understand the basic principles and practices of effective communications
- ✓ Identify and profile target audiences
- ✓ Learn how to develop a compelling message
- ✓ Learn effective ways of reaching target audiences with your message
- ✓ Gain practical information and tools that can be put into immediate action



The 5 Elements of Sustainability

“To make the greatest impact on society requires first and foremost a great organization, not just a great program.”

– Jim Collins, *Good to Great and the Social Sectors*

While there is no one formula for building a high-performance social sector organization, there are elements and processes that effective nonprofit organizations have in common. The following is a checklist of some of those fundamental components.

Clear and Compelling Vision

Brief, well-defined vision and/or mission statement

Statement of core values

Community assessment and feedback processes

Focused approach that is not redundant with other organizations' programs

Defined measures of success

Passionate and Engaged Board of Directors

Strategic approach to board recruitment and succession

Board members are articulate advocates for the organization

Clearly defined and consistently practiced roles and responsibilities

Clear expectations and accountability for board members

Written policies and procedures

Motivated, Professional Staff

Clearly defined roles and expectations

Skills and experience commensurate with needs

Appropriate compensation

Respectful, supportive work environment

Regular, constructive feedback

Adequate resources available

Effective Communications and Marketing

Strategic marketing plan with clear goals

Jargon-free messaging that demonstrates mission success

Proactive communications to constituents and the community

Compelling materials, including content-rich website

Board members and staff who can tell the story

Strategic Approach to Fund Development

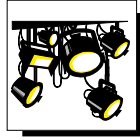
Strategic fundraising plan

Demonstrated support and participation by the board

Balanced portfolio of funding sources

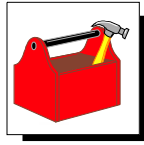
Constituent relationship management program in place

Endowments and reserve funds



Strategic Marketing Plan Elements

1. Organization's Mission & Vision
2. SWOT (Strengths, Weaknesses, Opportunities, Threats)
3. Competitive Analysis
4. Target Audience Profiles
5. Key Messages
6. Strategies
 - Tactics (PR activities, events, external communications, collateral materials, website, etc.)
 - Resources required (media list, photos, bios, press release template, wire service, etc.)
 - Timeline
 - Budget
 - Responsibility
 - Metric (how will success be measured?)



Essential Communications Checklist

■ Media

- Press kits
- Press releases
- Interviews
- Calendar listings
- Editorial briefings

■ Newsletters

- Electronic or print
- Frequency
- Seek inclusion in other organization's newsletters

■ Events

- Scripted remarks
- Speaking points for board members
- Printed pieces and signage
- Develop tone; entertainment and activities should support message

■ Websites

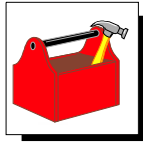
- Content rich – make your website a resource
- Regular Updates
- Design – easy to navigate
- Build resource base as appropriate – links to other resources

■ Person-to-person

- Develop and practice speaking points
- Encourage board members and employees to develop their communications skills
- Never miss an opportunity to talk about your organization

■ Collateral Materials

- Develop a plan
- Communicate a strong, consistent visual image – logo, typeface, art or photos
- Includes: Letterhead, brochures, , direct mail, posters, tent cards,
- Keep your message clear, jargon- free and concise



Message Development Check List

Who are you?

- What need does your organization address?
- How does your organization meet this need?
- What is different or unique from other organizations?

Who Cares: Audience Analysis

- Who are they? Who is likely to connect with your mission and message?
- Where are they? Where do they congregate? What would be likely parallel concerns, causes, or behaviors?
- What do they know about your organization/the issue you address?
- How do they feel about the organization/issues? Understanding this helps define your key messages and how to deliver them.
- What motivates your audience? Addressing this gives you the "Why" they need to follow your recommendation.
- Different people learn in different ways. Some work best with facts, others antidotes, others visuals. What type of learner are you addressing?
- How are they affected by your organization?
- When meeting with the press, remember that your audience is their readers/viewers/listeners. You have to address the concerns of your interviewer while delivering the message intended for the public.
- Finally, consider the environment in which your message is delivered. Are there distractions that you need to plan for? How much information can be transmitted in this environment? Are words or images more effective in this environment?

Make the Connection: Benefits

- What benefit does your audience get by taking the action you recommend? The benefit may be physical or psychological.
- Remember to draw on your audience assessment – What motivates your audience?
- Tailor your communication to your audience. Audiences are composed of individuals – so there are many potential "whys" - which personality types are you addressing in this communication and what would motivate them?
- Make the "why" real – demonstrate why with facts, antidotes, analogies, examples, details, and personal stories.
- Why might someone object to your recommendation? Be ready to address this in positive terms when communicating in person.
- Stay positive. Speak in terms of solutions to problems, rather than just listing the problems.

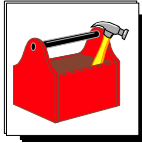
How: Call to Action!

- Always ask! To communicate without a call to action is a missed opportunity. Always give your audience an action item: learn more... join today... donate...
- Tell your audience the solution (action) you want them to take and be specific.
- This flows directly from the "What" of your assessment.
- Present your objective as a solution to your audiences' "Why?"



Audience Profile

Who are they?	Why do they care?	What is their interest level? (i.e., informed, engaged, motivated, maintained)	What do they need to know?	How do they receive information?	What do we want them to do?



Audience Profile Example



Brochure Project

Who are they?	Why do they care?	What is their interest level? (i.e., informed, engaged, motivated, maintained)	What do they need to know?	How do they receive information?	What do we want them to do?
Women, particularly mothers, (English & Spanish-speakers) who are victims of domestic violence	They are fearful for their safety and that of their children	Motivated	That there is hope and what services are provided	At a non-threatening, confidential location such as a doctor's office, school, or church	Call for help and seek safety
Female friends (English & Spanish-speakers) of women and children who are victims of domestic violence	People they know are in danger	Engaged	What domestic violence is and how to help their friends	All of the above, plus through their employers	Become educated about domestic violence, share information with victim
Potential donors and volunteers, primarily female, 30-60 years of age, college-educated, involved in the community	They are concerned about the long-term ramifications of domestic violence on the community	Informed	The big picture – the extent of the problem, its impact on society, and how they can make a difference	All of above, plus through service organizations, and media	Make a donation; become involved with the organization



Message Tree

Overview: Explain the Why, What, & How of the organization

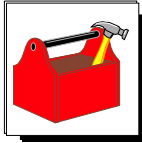
Why does it exist?	What is its vision?	How will it accomplish its goals?
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Main Points: What are the three main points that you want your audience to remember?

Main Point 1	Main Point 2	Main Point 3
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Subpoints: What facts, stories, and analogies support your message?

Subpoints	Subpoints	Subpoints
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Message Tree Example



Introduction: Explain the What, Why & How

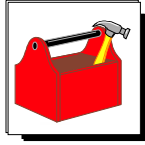
<p>What is your purpose? CHI's vision is to ensure that all children have the health care they need</p>	<p>Why does it matter? Because healthy communities start with healthy children</p>	<p>How will you accomplish it? By helping parents find, use, and keep health insurance for their children</p>
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Main Points: What do you want your audience to take away?

<p>Main Point 1 The importance of health care</p>	<p>Main Point 2 The benefit to Napa County</p>	<p>Main Point 3 The products and services offered</p>
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Subpoints: What facts, stories, analogies support your message?

<p>Subpoints</p> <ul style="list-style-type: none"> Regular access to primary care decreases expensive emergency room treatment and lowers costs for employers and taxpayers. The spread of disease is slowed or eliminated by proper preventative care for children. Adults miss fewer work days which contributes to a healthier, more productive community. Children with health insurance perform better and miss less school than those without. Fewer missed school days mean more money is available for our schools. 	<p>Subpoints</p> <ul style="list-style-type: none"> By enrolling eligible children in Medi-Cal or Healthy Families, Napa County could expect to receive state and federal revenues of over \$1.8 million dollars. Approximately 80% of Napa County's uninsured children are eligible for existing state and federal health insurance; the cost of insurance premiums for the remaining 20% who qualify will be subsidized by private donations and public and private grants. 	<p>Subpoints</p> <ul style="list-style-type: none"> Medical, vision, and dental health coverage (prevention and treatment) will be provided through Medi-Cal, Healthy Families or Healthy Kids health insurance programs. Parent education on how to access services will be conducted by community partners and referral agencies. Hardship funds will be available for families who are temporarily unable to make co-payments.
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Creative Brief Template

Project Title:

Overview: *(Project information, goals, measurable objectives)*

Deliverables Needed: *(Copy, design, printed materials, and/or mailing?)*

Primary Audiences: *(Who are they, how will they use this brochure or website, what should be avoided in talking to these audiences)*

Tone and Image: *(Funny and casual, or formal, what tone and imagery will be most effective, specific visual preferences)*

Key Messages: *(Use the messages you developed from your Message Tree)*

Budget and Schedule: *(Include allowance for stock images if needed)*

Process: *(Who is the point person on your nonprofit's side? What is the review and approval process? Who will sign off on final execution?)*



Sample Press Releases

EXTREME MAKEOVER: THE “BEFORE”

Media Contact:

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For Immediate Release:

April 24, 2006

Tug McGraw Foundation Launches New Website

NAPA VALLEY, CA April 24, 2006 – The Tug McGraw Foundation is pleased to announce the launch of its new website, www.tugmcgraw.org. The site will feature stories about brain tumor survivors, the latest research, and opportunities to donate to the organization. The Foundation partnered with the Robert Preston Brain Cancer Center at Duke University to create the site.

“We’re thrilled with our new website,” said Foundation CEO, Jennifer Brusstar. “It is a fitting tribute to Tug McGraw, the famed Phillies and Mets relief pitcher who established the Foundation before dying of brain cancer in 2004.”

Tug’s son, Grammy-winning country singer Tim McGraw, is featured on the website. He will kick off his fabulous, whirlwind tour across the United States in June, 2008. Tug McGraw merchandise is available for sale at the concerts with all proceeds going to support the Foundation.

The website was designed with the help of Jeff McMahan, a Foundation board member and keyboard player for Tim McGraw’s Dancehall Doctors. “The site is colorful and user-friendly” said McMahan. “We really worked hard on developing this unique and useful tool.”

For more information about brain tumor research and ways to improve the quality of life for those affected by brain tumors, visit www.tugmcgraw.org.

EXTREME MAKEOVER: THE “AFTER”

Media Contact:

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For Immediate Release:

April 24, 2006

Brain Tumor Patients and Their Caregivers Find Hope Online

Tug McGraw Foundation's new website, www.tugmcgraw.org, helps those affected by brain tumors get the information they need to live better while they fight the disease

NAPA VALLEY, CA April 24, 2006 – While the search for a cure for brain cancer continues, those struggling with the disease – or caring for those who do – are looking for ways to make the most of each day. As Brain Tumor Awareness Week (May 1 – 7) approaches, a new website, www.tugmcgraw.org, has been launched by national brain tumor research organization, the Tug McGraw Foundation, to give survivors, their families, and their caregivers, much-needed information to improve their quality of life.

“In addition to the overwhelming physical impact, brain tumors often significantly impact how patients think, feel, behave, and relate to others,” said Foundation CEO, Jennifer Brusstar. Brusstar was a close friend and caregiver for Tug McGraw, famed Phillies and Mets relief pitcher who established the Foundation before dying of brain cancer in 2004. She, along with Tug's son, Grammy-winning country singer Tim McGraw, witnessed first-hand the toll that the disease took on the elder McGraw. “Depression posed another challenge for Tug as he was being treated for brain cancer,” said Brusstar, who worked to keep her own spirits up while caring for her friend during his year-long fight to survive. She hopes that caregivers and families will find useful tips on the site to help them cope with the emotional exhaustion that often accompanies caring for ailing loved ones.

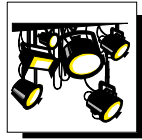
The website was designed with the help of Jeff McMahan, a Foundation board member and keyboard player for Tim McGraw's Dancehall Doctors. “One thing we really wanted to provide with the new site was reassurance,” said McMahan. “When confronted with something like a brain tumor, some folks just want to know what they are dealing with, while others find comfort in knowing that someone else has gone through what they are going through. Above all else, we want people to know that they don't have to deal with this disease alone.”

(continued)

There are approximately 300,000 people who are living with the diagnosis of a brain tumor. Each year, over 100,000 people in the United States will be diagnosed with a primary or metastatic brain tumor. Brain tumors are the leading cause of cancer death in children under the age of 20, and are the third leading cause of cancer death in young adults ages 20-39.

For more information about brain tumor research and ways to improve the quality of life for those affected by brain tumors, visit www.tugmcgraw.org or call (707) 255-5555.

The Tug McGraw Foundation is a 501 (c) (3) organization based in Napa, California. It was founded by former major league baseball player Tug McGraw in 2003 to help brain tumor survivors and their families live well by funding quality of life research and raising public awareness about brain tumors. The Foundation has established the Tug McGraw Center for Quality of Life and Supportive Care Research in Neuro-Oncology at Duke University, provides grants for brain tumor research, and awards scholarships to college students who exemplify Tug's "Ya Gotta Believe" attitude.



Three Keys to Quick, Powerful Message

By Bill Peatman

We've all heard about the so called "elevator pitch"—a scenario in which you're in an elevator with a prospective client or donor and they ask "tell me about what you do." You have about 20 seconds to grab their attention.

Well, these days the elevator is getting faster. Busy lifestyles, multiple media, and fierce competition for dollars make it imperative that any organization be able to quickly and powerfully tell their story. Nowadays, it is more challenging than ever to get someone to ask, "Tell me more." Here are three tips on how to make sure your trip to the 14th floor is successful:

1. Know who you are.

This may sound simple, but it isn't as easy as it sounds. You have to be able to set yourself apart from competitive products or other nonprofits. Most organizations originated to address an unmet need in the community, or to improve an existing product. Over time, though, we sometimes dilute our message in a misguided attempt to appeal to more people. The opposite happens. The more vague the message, the more confused people are about what you do. No one doubts what makes Southwest Airlines different from other airlines, for example. And no one is confused about the mission of Habitat for Humanity. These organizations know who they are, and they communicate who they are through all that they do. It makes it far easier for them to connect with people who might be interested in their product or service.

2. Understand who cares about what you do.

Once you identify your core Value Proposition—what you do that no one else does—it's a lot easier to identify who might care about that problem. For example, if your organization is about getting homeless people into jobs and housing, you probably won't find much support at a Relay for Life event. More likely, businesses and agencies impacted by homelessness would be eager to participate in programs that might address

the problem. Your message should be tailored to the people who are most likely to care. For example, if you're in the elevator with a community leader and she asks you about Habitat for Humanity, which of these answers would be most compelling:

- "Habitat for Humanity has built over 200,000 homes in 3,000 countries" –interesting, but does a local leader really care?
- "Last year five families moved off government assistance into home ownership in our community, and there are hundreds more ready to make that move. Helping them helps the entire community"—much more relevant. People are most likely to care about how they can impact their own community.

3. Make the connection.

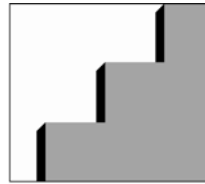
You may not be taking many elevators rides these days, but you know you need to get your message out quickly and powerfully every day. Once you know your message and have identified target audiences, how do you connect the two? A low-cost method is to make ambassadors of the people closest to your organization. One nonprofit launched a "Take 5 to Tell 5" program. They encouraged their staff and volunteers to tell five others about their organization, and to record their efforts. For every five conversations, the employee or volunteer received a Starbucks gift card. The organization reached several hundred new contacts at a fraction of the cost of an event or direct mail campaign. The reality is that your staff, your board, your clients and your customers constantly come into contact with people that don't know anything about what you do. This means that you may have an underutilized marketing machine in your own organization.

It all starts with knowing who you are—taking the time to identify what makes your organization or product uniquely valuable to customers and communities. This takes hard work. It is much more difficult to be precise than to be vague. Once that hard work is done, though, everything gets easier, whether it's sales, recruiting, fundraising, or board development. With consistent, accurate messaging over time, you will be known for what you do best. And you'll never be at a loss for words when it counts—in an elevator or anywhere else.



Recommended Reading List

- Begging for Change, by Robert Egger, HarperCollins (www.harpercollins.com)
- Boards That Make a Difference, by John Carver, Josey-Bass 2nd Ed.
- Self-Assessment Tool for Non-Profit Organizations, by Peter Drucker, The Peter Drucker Foundation for Non-Profit Management
- Welcome to the Board, by Fisher Howe, Josey-Bass
- The Nonprofit Answer Book: Practical Guide for Board Members and Chief Executives, by Andringa and Engstrom (available through Boardsource.org)
- The Nonprofit Answer Book II: Beyond the Basics, by R. Andringa, (available through Boardsource.org)
- Called to Serve: Creating and Nurturing the Effective Volunteer Board, by Max De Pree
- Governing Boards by Cyril O. Houle
- Beyond Profit by Fred Setterberg and Kary Schulman
- The Nonprofit Organization: An Operating Manual by Thomas Wolf
- The Knowing-Doing Gap by Jeffery Pfeffer and Robert Sutton
- Governance as Leadership by Richard Chiat, William Ryan, Barbara Taylor
- Generating Buzz: Strategic Communications for Nonprofit Boards by Sally J. Patterson, Boardsource
- Mission-Based Marketing: Positioning Your Not-For-Profit in an Increasingly Competitive World by Peter C. Brinkerhoff, Wiley
- Purple Cow: Transform Your Business by Being Remarkable by Seth Godin, Portfolio



**NEWLEVEL
G R O U P**

Take the Next Step

About NewLevel Group...

Who we are

NewLevel Group was formed in 2003 with a vision to strengthen communities by helping nonprofits and businesses take the next step in their development -- whether the next step means launching a business, developing a board, or updating an existing brand. Our team is made up of seasoned professionals who look at challenges from various perspectives honed from decades of experience in the business and nonprofit sectors. We plan as well as implement, never losing sight of our goal to deliver your desired results.

What we do

First and foremost, we listen. We listen to you, your board, your clients, and your colleagues to fully understand the challenges you face. Then, we form a team that will partner with you to identify your goals, outline strategies to achieve them, and, if needed, work with you to implement the tactics.

How we do it

Our approach to helping organizations improve their results reflects our shared values of collaboration, commitment, and community. We are different from other consulting and management firms in several significant ways:

- We work collaboratively; not just treating symptoms, but finding solutions for the underlying causes.
- We implement; we don't just create pretty plans, but roll up our sleeves to get the job done.
- We're focused on results; a good process is important, but the outcome is what really matters.

Management & Marketing Consulting for Nonprofits and Businesses

Strategic Planning • Marketing Planning & Implementation • Communications Programs • Meeting Facilitation • Management & Board Skills Training • Organizational Effectiveness • Nonprofit and Foundation Management

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