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Brandraising: One Organization, Many Channels

with Sarah Durham (Big Duck) and Nancy Schwartz (Nancy Schwartz & Co.)

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Rebecca: I'm really excited to introduce our presenters. On the phone today we have Sarah Durham and Nancy Schwartz.

Sarah escaped from the advertising, design and marketing world she'd grown up in and started Big Duck, which is a leading communications firm that works exclusively with nonprofits. Their clients include local, regional, national and international organizations, but there's the Leukaemia-Lymphoma Society, American Jewish World Service and the New York City Charter School Center.

According to her bio, Sarah is a self-proclaimed nonprofit communications nerd. She was named a top fundraiser under 40 by Fundraising Success magazine a couple years ago, and is a regular speaker at AFP and InTense conferences. She teaches a Fiery Nonprofit Communications Nerds class at NYU Wagner School and at the Athena Center for Women's Leadership at Barnard College. So welcome Sarah.

Sarah: Thank you.

Rebecca: And also we have Nancy. And Nancy also helps nonprofits succeed through effective marketing and communications as a publisher of the Getting Attention blog and e-newsletter, and as president of New York City based Nancy Schwartz and Company. So Nancy and her team there provides communications planning and implementation services to organizations that are totally varied. So everyone from the Corporation for Support of Housing, to the Robert Wood Johnson Foundation, to the Environmental Health Coalition and so on. Nancy is also a board member of In, the nonprofit technology network and marketing committees for her synagogue, high school and even the local PTA.

So without further ado I'm excited to turn the floor over to Katya [Katya Andresen, our moderator for the call] to get us started.

Katya: Thank you Rebecca. And I want to thank again Sarah and Nancy for being on the phone today. I'm sure it's pretty apparent from the introductions, but basically we have the honor of having the two smartest people on nonprofit branding on the line today. So I really do encourage you to send your questions to Fundraising123@NetworkForGood.org because you're not going to get better minds on the branding issues that you're facing right now.

I wanted to open by inviting Sarah to give us a quick tour of some of the highlights of her new book about nonprofit branding, which is called "Brand Raising." I've read it. I highly

recommend it. It's really easy and accessible to read. It's full of great ideas and can really help you think more strategically about your brand.

Sarah, could you open by giving us some of the highlights, and then we're going to open up for discussion with Nancy.

Sarah: Absolutely. And hopefully everybody who's participating in the call today got a PDF version of a handout which has a couple of visuals that I'm going to use. So if you're got that you may want to open it up, and if you don't, just to give you a quick link, you can access it at drop.io/brandraising.

Katya: Excellent. And just to hop in Sarah we also have it posted in our Learning Center. So that's a great, easy URL to get to, and folks, if you have Learning Center open you can just visit nonprofit911.org and there's a link below today's date and title.

Sarah: So I wrote Brand Raising because in the 16 or so years that Big Duck has been working with nonprofits we found that there are a lot of really passionate, smart mission-driven people out there trying to do the best possible communications work they can. But oftentimes it's really hard to know where to begin and how to work in a way that's not so reactive. So the book was intended to not only be a primer on branding, but really an overview how to approach communications overall if you're a nonprofit person who maybe doesn't have a branding or a communications background.

And if you look at what is page number six in the handout, you'll see a pyramid which is this kind of overview of the idea behind "Brand Raising." And it's essentially that the items that drive your strategic planning process, the organizational level, should inform your brand, which is the middle level, the identity level, and impact day-to-day communications. That's the bottom level, the experiential level. And the book really goes into a lot of detail about all of those things, but I just want to highlight, as Katya asked, three key points.

The first is something that I'm sure all of you are aware of but perhaps we need reminding of. And I think it's particularly true when it comes to communications, which is the idea of remembering to see the long view. Slide five has a picture of one of my daughters running through a field that I use as a reminder to illustrate this point that so often, and particularly these days with budget cuts and staffing cuts, we work reactively. We're so anxious to get out, let's say, that e-newsletter you've got to get done, or to get new content up on the website that sometimes it's difficult to stop and remember to take a long view and make sure you're going in the right direction. Why are you producing that e-newsletter in the first place? Who's it for and what's the action we hope they'll take?

And at the beginning of the book I think I've outlined three or four different sort of fundamental principles of effective communications, and I think stopping to smell the roses is a really

important one. And calls like this; participating in webinars, conferences help you I think get some perspective. So I want to throw that in as a reminder.

But then to dig into some of the meat of it on page seven, or slide 7, you'll see something that says "Positioning: The Big Differentiating Idea you Strive to own in the Minds of your Target Audiences." And I would argue that one of the biggest reasons that nonprofits don't communicate effectively is that they tend to get into the minutiae before they sort of stop and say, "OK. What's the big idea here? What do we want people to think of when they think of us?"

I'm fond of using the Red Cross as an example, because I've found in rooms of virtually any size if you say to people, "What do you think of when you think of the Red Cross?" They say, "Disaster relief." Or sometimes they say, "Blood donations." But these are really simple ideas for an organization that's been around for a long time doing lots of different kinds of work.

So I would encourage you to think about what's that big idea you want people to think of when they think of your organization. And when you get clear on that, it often drives forward a lot of decisions you'll make not only about branding elements, like your visual identity or your messaging, but even day-to-day communications. What's the big idea we're trying to reinforce in this e-newsletter? What's the big idea we want to make sure is asserted in our direct mail campaign?

And positioning is a tried and true marketing concept that for-profits have been using for decades. And the resources page on page 11, there's some other places you can find out more about that. But in particular there's a terrific book by Al Ries and Jack Trout called "Positioning the Battle for Your Mind" that I like to recommend.

And then the other marketing concept that I think is relatively new to the nonprofit sector, but it's the third point I want to highlight, is the idea of personality. And if you look at page eight you'll see a picture that shows the Mac guy and the PC guy from those commercials. And I love to use that example because most people have seen those commercials and they're sort of familiar with the idea that the Mac, the computer itself, is personified by this kind of smart, casual dude, whereas the PC is positioned in these commercials as this kind of nerdy, trying to catch-up guy.

And I'd love for you to think about your organization's personality. If your organization was, let's say, played by an actor, who would play your organization in the movie of your organization's life?

And a related example, to bring it back to the nonprofit sector, is illustrated on page nine. When you think of organizations like PETA or the ASPCA or the Humane Society of the United States, these are three very different organizations from a personality point of view, but they all share a common goal of fighting cruelty to animals. So the way they work towards their missions and

the tone and style of the way they communicate may be quite different. But ultimately I think where they're heading from a mission point of view is quite similar.

So the way you express your work, the way you write, if you write in a colloquial, casual way, for instance, versus a more formal way, can really say a lot about your organization. And oftentimes, positioning and personality are the strategic underpinnings of effective communications, and a lot of the brand development work we do and a lot of other work that we see organizations do very well.

So just to recap. The first is a reminder to stop and smell the roses and take the long view. Get out of the trenches when you can and make sure you're heading in a direction that not only is purposeful, but it is also mindful of the landscape — the best practices for communications, what your peers might be doing. So take the long view.

And then the second point is positioning. Be clear about that big differentiating idea you strive to own in the minds of your target audiences. And the third point is personality. What's the tone and style of your organization, and how can you make sure that that is expressed at all points of contact? So the way people feel about your organization reflects the tone and style you want to communicate. I think that's it.

Katya: Terrific. Thank you, Sarah, for that overview. Just to make sure we're all on the same page here then, it sounds like you have a very all-encompassing sense of what brand raising or branding is. And I'd like to delve into that just really quickly before we ask a lot of questions about branding, because branding means different things to different people. To some it's a logo. To others it's this all encompassing sense of organizational identity.

Sarah, how would you define it? And then I'd love Nancy to chime in to help us build that picture of what this really means to us.

Sarah: Yeah. I do see it as very holistic. And the reason I called the book "Brand Raising" is because I, in many ways, I think that effective communications and effective branding are kind of analogous to barn raising and also critical to fundraising. So the idea that at all points of contact we want to communicate strategically and that everybody in the organization is a communicator. The person at the front desk is just as much of a communicator as the people who are doing development work or outreach work.

So I do have a pretty expansive view of branding and I definitely shy away from conversations where branding is perceived as being about the logo, for instance, or being only about visual elements. To me, effective branding really links the organization's strategic goals with not only visuals, but also messages and then makes sure that they're expressed across all channels and tools.

Katya: Nancy. What would you add to that picture for us in terms of thinking about brand?

Nancy: What I'd add to that picture, Katya and Sarah, is what I call a brand promise. And Sarah, I love the way that you use imagery in your book. I think that does a great job, like the actor who's going to play the role of your organization in a film. It's a great way for folks to get to feel comfortable with these concepts.

So the essence of what I believe a brand is is a promise. And the promise is the value that your organization delivers to the communities you serve. And your brand is only as strong as your promise; it has to be reliable, consistent and authentic. And very much like a promise, what you say doesn't matter as much as what you do.

And Sarah, I'm right with you in terms of branding, or brand raising, is really the way that you convey your brand. It positions your brand within its most meaningful and productive space in this great big wide world. Definitely personality comes in here. I've traditionally just called it image and tone, but I love "personality."

And it's expressed generally in two ways, both the graphic identity as Sarah mentioned, and also, of course, through messaging. Positioning statement, frequently a tag line and talking points are key messages, which of course you're going to have at the organizational level. And also, if you have the time and resources, at the program or campaign level.

Katya: So is branding then, Nancy, what you want to project to an audience or what you are to the audience? In other words, is the organization really in control of defining its brand or is the audience? How's that work?

Nancy: I see it as an absolute intersection of the two, Katya. No organization, for profit, not for profit, is in control of any communications at this point in time. I think that's been shown again and again and social media just makes it more so.

A brand only works if you know your audience and know what they want and know what they're interested in. And an effective brand is the intersection of your organization wants, your organization's needs. Let's say what actions you want to motivate your base to take in order to meet your organizational goals, and your base's wants and interests. So what's crucial to an effective brand is knowing your audiences.

Katya: Great. And that's, of course, the underpinning of so much fundraising and marketing in everything else. But it always comes back to our audiences, doesn't it?

Sarah, what would you say to a nonprofit that's concerned that an organization may hope that their logo is a rebranding exercise? What would you say to them about finding this intersection? How do you get to that place between what you want to project and what is in your audience's mind? Can you really control that?

Sarah: Yeah. First of all I love what Nancy said about perceptions being a key part of branding, and I totally agree. I don't think you can control audience perceptions. And I think it's extremely

important in all aspects of communications to be honest and not try to position your organization as something that it isn't. And to start with what Nancy calls "the brand promise"; you know, is really the essence of who you are.

It's an interesting thing because I have seen a lot of organizations that on the logo sometimes as an expression for other organizational challenges. It can be, I think, sometimes easy to say, "The problem is our logo," or "We need to work on our logo in order to fix another problem." Like let's say making ourselves more appealing to donors.

But to get started, I always encourage organizations, before they make changes to their communication that have significant implications, to do some research and to research the perceptions of those audiences.

I've heard a lot of stories, and I'm sure some of you have too, about organizations that go through these rebranding processes and change their names or change their logos, and it can be really bumpy and in some cases really damaging. So I always really encourage organizations to not try to necessarily try to self diagnose what the problem is, but rather to start by doing some research and hear from the target audiences and make sure that, as you make changes, you're making changes that build on the equity you've established. So don't necessarily change the name because a board member says, "We should change our name." Check first if people know your name, and if it's recognized, and if people find it meaningful, and if it's supporting something significant.

Katya: Great. Thanks. So I bet some of the people on the call are intrigued but also may be overwhelmed. Can we sort of take it down to a tactical level and describe, you know, what does this mean to me if I'm a small nonprofit and I don't have huge amounts of resources? Why should I care about branding? And then this is a two part question. What are one or two things I could be doing differently or better at my organization when it comes to branding? What are the key takeaways? Nancy, do you want to start with that one?

Nancy: I'd love to Katya. Thanks. So for organizations small and larger, really, the value of branding is the same. And that's: we live in an incredibly overwhelming world and there's much too much content coming at us from all directions all the time. A laser sharp brand that conveys that intersection of where your organization is and where your base is, used consistently so it's recognizable and repeatable in an instant without even, let's say, someone who gets your letter in the mail having to think about who it's from is a way to shine out in the crowd.

So let's say you're sending out a fundraising campaign. It's a small one. You're a county-wide organization like a client of mine, the Union County Economic Development Corporation. And they were just sort of a faceless agency for a very long time. People would get letters in the mail from them, and unless they took the time to open the envelope, they frequently had no memory of what their connection with the sending organization was.

After some audience research and some core branding work, we worked with them to develop a graphic identity and some messages that included a return address that was really memorable. And what we found, in some very basic surveying after we introduced this, is that the recipients of these letters really recognized, in a glance, who they were from and were much more likely to open them. So that's a huge value.

Second value is let's say you have a message that you develop that's really memorable. And one I'm going to mention is the tagline of Homeboys Industries, which is a workforce development organization, also anti-gang, out in LA. They have a fantastic tagline: nothing stops a bullet like a job. Well, that's a tagline that you almost can't help yourself repeating to family and friends.

So when you have very strong messages that are easy to remember and repeat, it's a great way to exponentially expand your marketing base through corps of volunteer messengers, as well as your existing supporters.

One or two things to do differently, even for the smallest organizations, there's just what Sarah said, keep tabs on the branding of the organizations that are competing for the same action, dollars and/or attention, because differentiating yourself from them is key.

Second thing for you to do all the time, and it's easy to do when you're out at a Chamber of Commerce event, you know, meeting new folks, talking about your organization, or at another type of community event, is to check back with your community, with your base on whether your messages are resonating and sharing the input that you get back with your colleagues.

I'm not talking about any formal audience research like a focus group or even a survey. But when you're out there in conversation, talking about conveying your talking points, using your taglines, is their eagerness? Is the response eagerness to know more about your organization, or dead silent? That's really important information to recognize, to note to yourself, and to share with colleagues.

Katya: Great point. Sarah, do you have another tip or two that's sort of practical for folks on the money the phone differently or better when it comes to brand raising?

Sarah: Yeah. I think Nancy flagged a lot of great process items. And one of the things that I think is challenging for a lot of organizations is that implementing this stuff, in some ways, really requires a cultural shift. It's oftentimes the case, particularly in younger or smaller organizations, that the way the organization communicates hasn't necessarily been a focus of attention. And so doing something like a landscape review, which is what Nancy talked about, where you look around and monitor your peers, not only do you have to sort of carve out time to do that, but you have to keep doing it, stay on it. In some ways it requires a cultural shift, and in some ways it requires what I talked about earlier, taking that long view, taking time out from your day-to-day activities to kind of look at a bigger picture.

So one of the things I would encourage people to do who are trying to get some of this stuff going is facilitate some frank conversations between your staff leadership, maybe your board members, too, about the role communications plays in your organizations. And perhaps use some things that Nancy has written in the Getting Attention blog, or my book, or other things you could find for free. There's tons of it online at Nancy's site, and also at the Big Duck NYC site. And share those things. And have some conversations, and perhaps design a process that leverages the best your people can bring to the table.

So for instance, if you've got a budget to work with, external consultants or agencies, great. But if you don't, it's interesting to talk about who at the table has writing skills, for instance, and might be useful in developing a messaging platform, or working on that tagline, or who on your leadership team might be helpful in establishing positioning for the organization or personality.

So I mean I think the most important thing any of us can do is to try to kind of shift the culture within our organization to be mindful of communications, and how, as an organization, you are going to pierce through all that clutter and that noise.

Katya: OK, so I have a doozy of a follow-up there. When I hear the word “shifting culture,” that is easier said than done for many of us on the phone who are true believers of everything you are trying to say. But, you know, as both you and Nancy point out, good branding requires clarity about who we are as an organization and what we want to accomplish. How do you even begin to get everyone on the same page about that, because that's not easy?

Sarah: It's not easy at all. And I think that this is one of those things where, you know, you can lead a horse to water but you can't make them drink. I have found that the most effective ways to build buy-in for change are about giving people useful information and facilitating conversations without necessarily pushing toward the conclusion.

So, for instance, if you can get people in the room, and I've seen this done at board meetings in a really effective way, let's say you get your board members together and maybe invite some of your senior staff people. And without any agenda, you say, “Let's start this meeting by spending 10 minutes to look at the website of three other organizations in our space.” So if we're, let's say, a community center, let's look at three other local community center websites and let's talk about how they are communicating or what we get from them when we look at their website.

And then maybe at the end of that, let's talk about our website. And I don't think you even have to come out of that conversation with, you know, with a clear conclusion. But I think what those kinds of conversations do is they get people to kind of focus on communications and to remember that while everybody on the staff or the board has a very kind of immediate and personal connection to the organization, at some point you have to sort of take off that hat and put yourself in your audience's shoes and think for a second about how they're perceiving you and how they way they perceive you might be different from how they perceive another organization that they get services from or make a donation to.

So I think that that's a really important way to do it. And I also think distributing readings can really help.

I had a meeting yesterday with the guy who runs marketing communications for the Jewish Federations of North America, which is a kind of loose association with lots and lots of organizations. And that organization, the Jewish Federation, went through a very significant rebrand last year.

And the chapters that are a part of that organization had no obligation to adopt the new brand. And he was telling me that, actually, the most effective way to get those local chapters to want to go through the brand, to want to use the materials they developed was not to push them. It was to show them why the work was good and invite them to participate if they wanted to, but really more by just sort of showing success stories and highlighting benefits to help people get there on their own. And I think that that's a great way to do it, and it often is a slow process. It can take months or even years.

Katya: Yeah, I'd really reinforce your points there about pointing to successes, because when people start to see things working, the resistance level goes down a lot, which is always a good thing.

Nancy, have you worked with any organizations where this has been an issue about trying to get everyone on the same page about who you are and what you stand for? What are some things you've done that have been effective in sort of rallying people around a common vision?

Nancy: Not only is it occasionally the situation I face, Katya, I'd say it's a situation I face 95% of the time. So it's really common. And part of the reason for that is that this process of communications actually puts out there, in a way that people see, in a way that is articulated, what might have been assumptions on the part of one staff member, a certain board member, or the executive director, but not shared assumptions for a very long time.

So it brings all these varied perspectives out into the open where they are sort of very, very exposed. I love Sarah's idea of facilitating a very open-ended discussion process. And sometimes what I find is that that helps, let's say, staff and board members see that there are common themes that they are bringing to the table, although they are conveyed through varying perspectives. And I think that when you have a very, very loose agenda, people are more relaxed and commonalities do surface.

You want to put this second idea into play only when you really need to, and that is going out there with whatever you've found, in what Sarah terms a landscape view, and I love that; what other organizations are branding effectively. Show your team, your cross-functional marketing advisors — the folks you need to buy in to service your messages — what other folks are doing well.

And not only is that great because they are very useful models for your organization, but it frequently motivates a competitive response which takes the form of support for your work in digging into more effective branding.

Sarah: Absolutely. I just want to chime in and support that. I can't tell you how many times I have seen a board member step up to fund a communications project once they see how the organization that they serve looks, and feels, and sounds compared to peers. So often that competitive piece, wanting to be the best, is a great fuel.

Nancy: Yeah. It's not only wanting to be the best. I think that's a really big....you know, we're all competitive in our own way. But it's wanting to take care of our own, and realizing that we can do better.

Katya: Great point. And just to underline the importance of this common vision, Sarah, one of my favorite lines in your book, it's in the chapter that talks about why strategic planning has to come before branding. And it talks about how by doing that, you get away from that, "I don't like that logo" reaction to something like, you know, "That logo doesn't work because it doesn't reflect our values or it doesn't encompass our objectives." And that's kind of really the valuable discussions you want to be having and not the more superficial ones.

And you all just did such a nice job of showing the folks on the phone today how you begin to sort of seep in that conversation at the organizational level. So that's really valuable.

As you mention in the book Sarah, nonprofits say the biggest barriers to effective communications and branding are time and money. That's not a surprise to any of us on the phone. I think we all feel those pressures.

I'd like to add another one which is sort of a follow-up to the conversation we just had, and that's internal support. It's hard to get the time and money to do branding or rebranding if the decision makers in your organization don't believe it's a worthy exercise. Could you give us some tips on selling this internally, like even getting people to agree to the types of exercises we're talking about?

Sarah: Yeah. That's actually one of the big reasons I wrote the book, was that it seemed like it would be very...and I've already seen this happen. It seemed like it would be useful to have something that a nonprofit staff person could take to a board member and say: "Could you read this and think about it?"

But there is a kind of inherent aversion to anything that is overly branding or communications or marketing. And some nonprofits, less so with staff, but more so with board, have kind of a sense of not wanting to invest too much in something or make it too slick.

And again, I think back to our earlier conversation. Doing that landscape scan and seeing how your organization compares to others can be really important. And also another tool that I love, I

find is really effective and really easy for organizations to do, is to get your..maybe right at the beginning of a board meeting or at a senior staff meeting or something, get everybody in a conference room and lay out on the table all of the communications pieces your organization has produced over, let's say, the past year or the past few years.

So pull out any flyers, or postcards, or brochures, or annual reports you've done. And even print out a couple of screenshots of your website, or your Facebook group or whatever you've got. And put it all out on the table and then have a conversation about it.

And what often emerges from that conversation is this sort of...this shock about how disconnected all the pieces are. How things don't look the same or feel the same. And oftentimes, one of the best ways to build buy-ins for change is to just get people to fundamentally buy into the idea that communicating more consistently could help.

So communicating more consistently doesn't necessarily require spending money. It just requires coordination. And once you start coordinating communications a little bit better you're starting again to sort of shift the culture to be a little bit more mindful of communications. And I find that oftentimes once that starts to happen, the budgeting or the staff time gets allocated as those internal--what you've called internal support barrier--such as that gets removed, other things start to open up.

Katya: I guess seeing is believing. And when you have to look in the mirror at all your [Laughs] materials that may not look in harmony, that's a great idea. I think most of us might find that a mildly painful process.

Nancy, is there anything you'd add there? You've done some wonderful blog posts on selling marketing budgeting internally and I'd really point everyone to GettingAttention.Org to further explore this issue. But is there anything you'd add specific to branding here and winning internal support?

Nancy: I definitely would. I've loved--Sarah is great with some very practical ideas. And again, the landscape scan is a great idea. And just...as you said, putting it in front of people so they can't pretend that there's not a problem.

The reason I think branding can be a really hard sell, as well as marketing in general, is that a lot of leadership of nonprofits, especially on the board side, they just don't really know what it means. What is it? What should it be to a nonprofit? So I think that...and especially branding. Branding, for any organization, is very...seems very intangible.

And I love Sarah's idea of getting copies of her book, a few copies, sharing them with the board. Point them...make it easy for them. Point them to a few specific chapters, of highlights. And I think that's...once you have them building their own comfort level and their own understanding, that will take care of a certain degree of the aversion to branding.

Another way to do it is that people don't really get...even if they're--can accept, yes, we don't like branding or marketing. It has the stain of the for-profit world. If you can build an

understanding of how specifically marketing helps your organization, what is the value? So there are no program participants without marketing. Nobody takes advantage of your services. There's no volunteer program. So give some very specific examples, because they may be thinking of marketing in a very, very different way. So increasing the comfort level and understanding of those in charge can be very, very useful. And it's something I think is overlooked.

Katya: Great point. Both of you sort of talked about the importance of pointing to great brands to sort of galvanize people internally to do better, and to get work for branding and brand raising. Can you each give me an example of a great nonprofit brand so we know what one looks like and one that might be good to point to? Sarah, could you start us out?

Sarah: Yeah. I love that question and I get asked that question a lot. And I think it's a particularly difficult question to answer, not because there aren't lots of organizations out there that I think do a great job, but rather because I think the definition of success is largely an internal one. For instance, if an organization is trying to communicate with a very specific audience to achieve very specific goals, then what makes their brand a success is that they speak that audience's language well.

So oftentimes the brands that I most admire are the ones where either I reflect their target audience. I'm either the type of donor they want to reach, or the type of program participant they want to reach, or maybe the type of an activist they want to reach. Or, you know, obviously, I'm quite fond of a lot of the brands that I've played a role in working on because I know the inside skinny. I know who they were trying to reach and what they were trying to do. So I don't want to plug a lot of organizations that I've worked with specifically so...to avoid that-- I always think the Red Cross does a really interesting job.

I think that they have a brand that has been around for a very long while. And while I can't say that if I were to design their logo today that's necessarily what I would pick, but I really commend the principles of how they communicate, how consistent they are both on the visual side and on the message side, and how they really link all aspects of what they do right back up to their mission.

If you read their mission statement, you'll see the backbone of their positioning really echoed in it. And I think they've just...it's very, very hard in a large organization to not, as you grow, become silo'ed and communicate in a more fractured way. So I'm always impressed with the way they manage to keep a lot of, lot of different people mobilized towards a common way of communicating.

On a smaller scale, we have a client called the National Military Family Association. And last week I was in Washington, DC attending a summit that they organized. And we did a lot of brand raising work with them over the past few years. And it's been really exciting to see how they've taken that work and really run with it. And what's particularly exciting is to see the results of this —the number of people who are now supporting the organization as members, or as donors, or participating in their programs that hadn't participated in it in the past.

So again, my definition of what constitutes a successful brand is really more impact-driven than visual or tagline. With that said, one of my favorite things about Nancy's annual tagline report is there are some phenomenal people out there doing great work. And the tagline that Nancy quoted earlier is an example of that. There's some real compelling zingers. And so I do like showing that stuff and looking at that stuff, and encouraging more organizations to use it as inspiration as they rethink the way they communicate.

Katya: Great. We have loads of good questions. So I want to turn to those. But first Nancy, we can't have you on the line without talking about the [Laughs] Branding Tagline Connection. Because if you all aren't familiar, every year, Nancy does an amazing report on great nonprofit taglines. And so Nancy, could you talk a little bit about your favorite brands? And maybe use that as an opportunity to talk a little bit about the Branding Tagline Connection as well?

Nancy: I'd love to, Katya. Let me first just do the brand overall question. And one of my favorites, and I am certainly right in the middle of their target audience, is the Environmental Working Group. And it's also a great example, I think, for the folks on this call, because it's a pretty small--small in terms of its annual budget and the number of staff and so forth--organization. But they really capitalize on some effective branding, because it's some very powerful work.

And what they do is--this is actually their tagline. They use the power of information to protect human health and the environment. And how they differentiate themselves is they say that their research brings to light unsettling facts that you have a right to know.

How they convey this, and they come out all the time with very pithy and easy to recognize emails which are incredibly simply designed. Nothing fancy here. But they're all consistent. And so I see they have certain things. They're very practical. Their personality is practical, hardworking, of value. And they're almost like, I'd say, the Consumer's Report for their target audiences on health and the environment. They're unique, they're real, they're consistent. And they've taken...they've used, also, some really great tactics. Like they've come out with the latest series of emails in the last few months with these one word subject lines that just give you enough information to be intrigued, but not too much that you won't open it.

And they've done some really great, engaging branding work. Taglines, and theirs is a good one, I wouldn't say it's a great one, are... I actually starting doing this report because I saw that, as a kind of overlooked area of nonprofit communications, that taglines are what I consider to be in a way the haiku of branding. And it's your greatest opportunity, and this is every organization, to convey your brand in eight words or less. And it's all over the place. From your business card to your...it can be on your email signature to your letterhead. It's actually all over the place. As I mentioned, one of my favorites is the one of Homeboy Industries: Nothing Stops a Bullet Like a Job.

And why this works so well is that it complements the name. You wouldn't really know what Homeboy Industries is. It's not a descriptive name. But the tagline tells you a lot more--doesn't tell you too much, and that's a good thing, because you want your audience to dig in and ask for more, whether that's in person or going to your website. It also conveys a great deal of

personality. Kind of a grittiness, an urban-ness, a grassroots approach. And it's very memorable. And if you contrast that with one that's on the not-as-great, could be improved side--and that's from a bio-ethics research institute called the Hastings Center.

And they do incredibly wonderful work. But their tagline isn't quite as wonderful. And this is their tagline: Because Science Raises More Questions Than It Answers. I'd say this tagline raises more questions. [Laughter] It's absolutely generic for a science-based organization. It doesn't tell me anything about bio-ethics or research, or what's unique about the Hastings Center. It's just kind of a waste of real estate.

A tagline can be so, so useful. It's just so short. If you make it memorable it's easy to repeat. And it's really likely to be passed on by your base to their friends and family who have the potential to become your supporters as well. If I could just go...mention just very quickly that the annual report I do on taglines comes out of an annual awards program that we run at GettingAttention.org for nonprofit taglines.

So I want to invite all of you. That'll be open for business in about a month and the Network for Good folks are always good enough to spread the word. So please look out for that. I hope that you submit your tagline.

Rebecca: Can I just quickly add two things to that?

Sarah: Sure.

Katya: We have about 10 questions so we'll get to those, too. [Laughter]

Rebecca: So I'll move fast. So first I just want to mention we did a little bit of work with the Hastings Center last year. Not on their brand, but they are aware that they need a better tagline.

Nancy: Good, good! [Laughs]

Sarah: So that's good to know. And the other thing I would add to what Nancy said is we encourage, and this is in the book too, we encourage organizations to do a tagline test. And a good way to do a tagline test is to write the names of all the organizations that you might have some overlap with, organizations you'd consider to be your peers or your competitors. Write them all down on a piece of paper. And then next to that, write your tagline. Or the tagline you're thinking of using. And take a look at how many other organizations could use your tagline. And hopefully what you'll find, and what we generally find is, the more powerful and unique, and compelling a good tagline is the more you'll find only your organization could use it.

That it's hopefully tied into something about you that's really special. Your personality, your positioning, the essence of what you do in your mission. So when somebody on your team comes up with one of those taglines that's like three words with bullets in-between, that kind of mean nothing try taking that tagline test and maybe that'll help move the conversation toward something more compelling.

Sarah: Great! That's a great idea.

Katya: Great. Thank you. Thank you. So Rebecca, I'm going to turn it over to you for the remainder of the call to take some of the many questions that have been emailed and pose them to our branding experts today, thanks so much.

Rebecca: Great, thanks Katya. So I forgot to mention I'm happy to hop in...thank you to everybody on the phones that have submitted questions. We have quite a pile here. So we're going to get through as many as we can. First I'd like to start with Sara's question. And it follows after the discussion that you had, particularly about the Environmental Defense Fund, mainly when you mentioned that they have really pithy, engaging email communications. Sara's a little concerned about recreating that at her own organization. And she says: “

What do you do if you're a small nonprofit and have no real talent at messaging, etcetera, to come up with memorable taglines, good names, things like that? In other words, I understand that I should come up with a quippy statement about what we do but that takes talent. What does a nonprofit do when it doesn't have the funds to pay for someone to coin that kind of thing for you?"

Nancy: And Rebecca, who would you like to take that? How would you like to do this in terms of Sarah and I taking this on? Is that for me?

Rebecca: We'll send that to you first, Nancy, since you brought up the...

Nancy Schwartz: OK. Sure. Well, thanks a lot. That's a very hard question, Sara, and a very, very good one. And a common challenge for a lot of organizations, not just small ones. One way to enrich your...idea pool is to ask your existing base. So you can ask, and an online survey is a really good way to do this. To reach out and ask what pre-adjectives come to mind when you think of our organization? Or please describe what you see is the value of our organizing in a sentence.

So it's...this can be a very good way to actually kill two birds with one stone. You're doing a bit of audience research but you're getting some very good ideas on words that are meaningful to your audiences because you're getting them from that very same group. So that can work well.

Another thing I frequently advise organizations to do is to form an ad hoc marketing advisory group among your supporters. And a way to do that is if you put out a survey like this, include a question at the end: if you're willing to serve as part of a--get an occasional email, let's say not more than monthly at the very most--on a marketing question we have, or to test our...to be part of a test group for a new communications approach, let us know. Please give us your name and email.

I find that folks are very willing to do so. So you have an ongoing advisory group who can help you shape your messaging as you move it towards the final stage. Those are a couple of recommendations.

Sarah: Yeah, and I think those are all great. And I would add a couple of other ones. We've seen small organizations that--this issue of talent, what do you do when you don't have the talent internally--is a really big one and it's a real challenge. And we've seen organizations solve this problem in a few creative ways. One other option, and this is a nice thing to do after you've done some surveying as Nancy suggested, is to organize a group brainstorming party. Get the people you think are most likely to be creative on your staff or board, even your volunteers or donors. People who are connected to the organization in different ways who have good ideas. And structure some sort of group brainstorming exercise with them, perhaps in the early afternoon.

And serve some wine. Wine and beer. Make it fun and playful. And use some sort of facilitating exercise to draw out ideas from the group. Sometimes you'll get great creative ideas from that. And oftentimes donors and volunteers love being included in that way and are very happy to share their ideas. Sometimes you'll even find that you've got people who, like a board member who's willing to invite their friend who's a copywriter along. Or has some connection that might be useful.

Another thing is there are some resources out there...who can help you connect with experts and fund it for you. A lot of organizations work with the Taproot Foundation. I think their website is TaprootFoundation.org, to apply for grants to have the Taproot Foundation do creative work on their behalf. Taproot basically takes people who work in the corporate sector who want to do pro bono work and matches them with organizations that have applied for grants to do work. And I've seen some terrific work done with messaging, or taglines, or visual identifies through Taproot grants.

My book is a resource. I mean, a lot of it is...are tips and examples and things you can do. And then lastly, I would encourage you also to look at the foundations who funded your work and see if they have technical assistance or capacity-building grants. Quite a lot of the work we've done at [Sounds Like] Big Duck for smaller organizations has been funded by organizations like United Way of New York City or other foundations that want to help small organizations do things that they really need some specialized expertise for.

So it can take a while to get those grants but oftentimes it's a great way to kind of get some talent and expertise beyond the walls of your office.

Nancy: And if I could add one other idea. Here in New York where Sarah and I are both based there is a very good source for nonprofit professional development called the Support Center for Nonprofit Management. And Sarah and I both do volunteer--the trainers are volunteers. And these half day or daylong trainings are really very, very modest. And the same sort of center exists in--I know several other big cities. So those are frequently--very, very good resources to build that talent. Nobody is born with that talent. It's developed. And it's very hard to have the time to develop it, especially when you're one person with it wearing many, many hats. But taking yourself out of the office to a three hour training is a great way to start.

Rebecca: Great. So Sarah, I'm actually going to kick this next question to you. This comes from Debbie. So we just gave a lot of great examples just now of groups to get together, and ideas of who to get together in one room. It sounds like Debbie found those people and now is not quite

sure how to get the decision-making process going. So Debbie's question says, "We are working on developing a new brand strategy. Our organization typically makes decisions based on consensus. But that can lead to fatigue and the quote, 'dumbing down' of the ultimate product. Can you provide tips on how to establish a strong decision-making model while making sure that the board and staff really feel heard and validated?"

Sarah: Yeah, that's a great question. And I actually wrote a piece on exactly this. And I'm going to see if I can find the exact URL for you as I answer it. But I find one of the things that is difficult is helping people--basically, I would say your goal is to craft a process that helps people offer their opinion and feel heard, and feel like they've contributed positively without having every decision that has to be made be a consensus decision.

I wrote a piece called "Great Creative by Committee" and it's on the Big Duck website and I'll give you the URL in a second. But what this white paper outlines is the suggestion that before you get too far into--in your case this branding process--but it could also be applicable to other communications processes. Get all the people in the room who need to be involved, or who want to be involved, either in the room or on the phone, or interview them individually. And put out on the table that if you try to do something entirely by consensus you're going to end up doing what somebody on my staff likes to call "Frankensteining," which is pairing all these disparate pieces together in the name of making everybody happy.

And that rather than "Frankensteining" a solution, it might be more effective to ask everybody where they are going to be most helpful in the process and to encourage them to make a contribution in a specific area of the process rather than at every aspect of the process.

So for instance, if you have a board member who fancies themselves...a terrific copywriter you might say to that board member, "Great. How about we leave you out of the parts of this process that are visually driven? For instance, reviewing logos and colors and things like that. But when we get to the part where we're working on our tagline or messaging platform, how about we involve you in the briefing at the beginning and in the first review of creative?"

And what I have seen is that if people are very clear on when they get to participate and how their voice will be heard they're often okay with letting go of not being involved in every step of the way. The piece that I wrote is, again, it's called "Great Creative by Committee." And if you go to BigDuckNYC.com and you search for "Great Creative by Committee" you'll find it. The URL is kind of long. But if any of you are on Twitter I'm going to Tweet the URL right now as a Bit.ly. And my Twitter handle is @BigDuckSarah.

Or I can share this with Rebecca afterwards and she can send it out to the group.

Rebecca: That'd be great, yeah. I'd be happy to circulate it. Excellent. So now since we just talked about having multiple people in the room we've gotten multiple questions. So I'm not going to try to [Laughs] credit this to any one participant but we've gotten multiple questions from folks in the audience today who have--who want tips on how to brand in a couple of different scenarios. One, where they have multiple programs, and two...could be the same or a different organization where they have multiple audiences to whom they're reaching out to.

Maybe Nancy, we'll start out with you this time. Do you have any recommendations of how maybe some of these organizations that have a lot going on can still be unified and effective in their communications and branding?

Nancy: Sure. And let me actually if I could flip the question and start with those organizations who deal with multiple target audience segments. And I'd say that's most organizations. And it can be a real challenge. For example if you're trying to engage those who are as varied as the staff in the offices of policymakers as well as the local community activist, there are some very interest--different needs and wants on the part of those two groups. Not to mention the others you're trying to reach.

Really, organizational branding must hit whatever common denominators you can find among all your target audiences. Sometimes--I am asked in the process of a branding project, "Can we use different taglines to engage different parts of our audience?"

And the answer is no. because you want that--all of your core organizational branding to be relevant across the board. And the way to do that is really to focus on shared values and shared vision. And then what I do recommend of course is that you can develop talking points that are organizational, that are--I'm sorry. That are segment-specific that speak directly to the interests and wants of each particular segment. So that you are emphasizing your organization's relevance to that part of the base.

Now, in terms of branding multiple programs your overall organizational branding elements, both on the graphic and the messaging side, need to speak to all of those programs. But if you do have the time and the resources to do so you can also brand on a programmatic...for each of your programs or for the main program. That's okay as long as you don't replace your organizational brand with the programmatic brand.

Sarah: Yeah. I'd love to just add onto that. I definitely agree with everything Nancy said, and just to underscore her point about for instance having multiple taglines. It's very rare for any nonprofit, even the biggest and the most well-funded to have enough money to fully market themselves as aggressively as they would like. And so when you start communicating with different audiences in different ways or spinning off a lot of sub-brands, what you're essentially doing is fracturing what is already probably a fairly limited amount of resources.

So I like to think of your organization as the mother brand. And maybe keep programs you have or very disparate audiences as potential sub-brands. And to me, the marker of when it is worth considering creating a unique sub-brand or unique messaging, or creative point for a sub-brand is when the audience you're trying to reach not only is really different from your core audience but maybe in some way might be alienated by the messages you're sending to your core audience.

So just for example we're working right now with an organization that reaches kids ages about 16 to 30. And what we've found in our research is that the messages that are going to work with a 16 year old, surprise, surprise, don't appeal to a 25 year old. They're in very different times of life even though they're not that different in age. From my [Laughs] point of view at least. And

so that's a case where the messaging to a 16 year old does need to be somewhat different than the message to the 25 year old.

But if the audience for Program A is similar to or should benefit from, or might want to know about Program B then it really serves you to keep all of your resources behind the mother brand.

And message--send out big cohesive, coherent messages consistently at all points of contact.

Rebecca: So amazingly enough, you know how time flies, it is already 2:00 Eastern. So just to be mindful of everyone's time, we know everyone is busy, both our speakers and the folks on the phone, I think we're going to wrap up for today. But thank you to everybody who sent in your questions. We will do our best to respond after the call and we've heard your requests for repeating some of those branding examples. Sarah will be sure to circulate the "Great Creative by Committee and other such links after the call.

So first I just want to thank both Sarah and Nancy. We really appreciate you taking the time to be with us today.

Nancy: Thank you. It was a lot of fun!

Sarah: Yes. It's great to be with you. Thanks so much.

Rebecca: Wonderful. And of course, thank you to everyone on the phone. We know how busy you are and as a lot of your questions alluded to, how many hats you're wearing at your own organizations. So we appreciate you taking the hour out and encourage you to join us on a future 911 call. Of course that URL again is www.nonprofit911.org. Keep an eye on your inbox for other information and follow-up to this call and we look forward to speaking with you again soon. Thanks everybody and have a great rest of your day.