

Assisting Community Foundations with Branding, Standards, and Marketing: Lessons Learned

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Introduction to Lessons Learned Series

Michigan has been intentional about growing community foundations since the late 1980s. Local efforts have been supported by the Council of Michigan Foundations with funding from the W.K. Kellogg Foundation. FERA (Formative Evaluation Research Associates), an independent evaluation group, and Williams Group, a strategic communications firm, have documented growth, identified supports and obstacles, and developed lessons learned. This document is part of a larger set of lessons learned across multiple state-wide initiatives about community foundation growth. To learn more about a conceptual framework and methods for developing lessons learned see Evaluation Overview in “Introduction” on www.GrowingCF.org.

Background

Michigan community foundations began exploring the idea of “branding” or establishing a common identity in the late 1990s. This exploration was in response to two driving forces. First, there was a concern over the relative lack of awareness of who community foundations are and what these organizations deliver. They were often described as “the best kept secret in town.” Second, well-known national investment firms were starting to provide their clients with on-line charitable giving options. Community foundations wanted to develop common products that would keep them on the cutting edge of the charitable giving field. Before they could do this, they had to decide the extent to which they were willing to work together as a field.

Community foundations are by definition local organizations. Michigan community foundations had to decide where they wanted to be on a continuum from being “lone stars” (independent organizations) to choosing a stronger affinity in message and identity. The opportunities and issues uncovered in this process caused the state-wide field to explore fundamental questions with long-term implications for Michigan community foundations. If the state-wide field wanted to build a stronger market

presence, it needed to build a more unified brand, which in turn required a common identity. Sharing elements of a common identity brings benefits and risks to individual community foundations. Benefits can include: 1) increased visibility, presence and name/brand recognition; 2) credibility from being part of a much larger whole; and 3) efficiencies of scale. Risks include: 1) negative reflections on the group if one member does not operate professionally. People expect a similar level of service and/or standards of quality when a group shares a common brand. Risk management and ensuring a common level and quality of service was addressed by developing shared operating standards.

After a great deal of discussion at the local and state levels, community foundations decided to create a more unified brand, which included using a positioning statement or “tag line”, having “community foundation” in their names, and an agreed upon “identity system” for local and state-level marketing materials (Figure 1). The objective of the identity system was to clearly and consistently communicate a relationship among all Michigan community foundations, *and* emphasize the independent and local nature of each community foundation.

Identity System – Figure 1

<i>State-wide identity</i>	<i>Local identity example</i>	<i>Positioning statement</i>
<p>Michigan <hr/> community foundations</p>	 <p>Battle Creek <hr/> community foundation^{inc}</p>	<p>For good. For ever.</p>

Throughout this process, the Council of Michigan Foundations (CMF) served as a catalyst with the Williams Group, a strategic marketing communications firm, as facilitator for the discussion about branding and the process of developing standards.

Once standards and a common identity were in place, Michigan community foundations moved forward with a state-wide marketing effort. The Venture Products Fund initiative focused on developing customizable marketing tools and on reaching out to professional advisors, including lawyers, estate planners, financial advisors, and

insurance agents. Building relationships with professional advisors is an efficient and effective way to connect with new donors.

Community foundations were eligible to participate in the Professional Advisors Campaign when they were in compliance with standards. The campaign had two levels of activities: 1) *Statewide promotion* through advertisements placed in key publications, and development of a common website (www.forgoodforever.org) to build a stronger presence with this collective audience and 2) *Local activities* to build stronger relationships with professional advisors in each community foundation's local area. These activities included identifying the professional advisors in their area; establishing a professional advisors council; meeting face-to-face with professional advisors; and hosting luncheons or other group meetings with professional advisors. Some community foundations ran advertisements in local or regional publications.

To help community foundations staff and trustees/board members prepare for the campaign, a marketing capacity building series called *Building Foundations* was developed. This series included four sessions focused on: setting strategy, shaping communications, preparing products and forming relationships.

The rest of this document presents lessons learned first related to developing and implementing operational standards, and next focused on the Professional Advisors campaign. These lessons are focused specifically on enhancing the role of a support organization in growing community foundations.

Lessons Learned

Lessons learned related to branding, standards, and marketing were developed based on evaluation research including: two sets of interviews with a representative sample of nearly half (20 out of 56) community foundations, a survey of the field, and interviews and data interpretation sessions with CMF and Williams Group staff. FERA also attended state-wide meetings where a) draft standards were discussed and b) finalized standards were presented. For more information, see *Community Foundation Marketing and Communications: Lessons Learned* found in the Marketing and Communications Lessons Learned section under "Strengthening Community Foundations" on www.growingcf.org.

Standards

- ◆ **Carefully think through and communicate to the field any new role or change in operations.** Because CMF is a membership organization, standards compliance and their role in the compliance process, was an issue that was thought through very carefully. CMF did not want to be put in the dual role of providing service to members as well as monitoring their compliance with standards. The solution was to have compliance reviewed and approved by the Michigan Community Foundations' Ventures (MCFV) board. MCFV is a support organization of CMF and has a board comprised of representatives from community foundations.

CMF is known for being highly responsive to meeting members' needs. The Venture Products Fund Initiative represented a partial break from this tradition. For example, community foundation staff were used to having CMF staff send them sample documents and boilerplate language. An intentional decision was made not to provide boilerplate language for standards, and community foundation staff members were referred to the website for documents explaining the issues and raising questions community foundations would need to answer to design, approve and implement policies and guidelines to meet their community foundation's specific needs. The rationale behind this decision was that community foundations would need to understand and grapple with the issues that standards presented and by doing so, board members, not just staff had understanding and buy-in to documents, policies, guidelines and procedures of the community foundation.

- ◆ **Assess the resources already in place to support the implementation of standards and any related initiatives.** Develop realistic timelines given the resources available. Michigan's 18-month timeline was highly ambitious. The timeline for meeting standards was rushed especially for smaller community foundations with few staff. Finding the time needed for their boards to meet to fully understand the connections among standards, identity and marketing and to implement standards was a challenge for community foundations of all sizes. The initiative was able to be successfully implemented within that timeframe because of the following: 1) full-time staff and consultants were available to provide community foundations with the necessary technical assistance; 2) Michigan community foundations had a past history of working together on statewide initiatives; 3) community foundations with under \$20 million in assets had already received lots of technical assistance and had already implemented many best practices that they were able to formalize in order to meet standards; 4) a strong relationship and level of trust had already been established between CMF staff and consultants and community foundation staff and board members.
- ◆ **It is not enough to simply disseminate marketing tactics to the field.** Strategic decisions need to be made about levels of common identity and standards. There needs to be participation and buy-in from the field around these strategic decisions. Community foundation staff and board members all

need to understand the connections between marketing, identity and standards.

Michigan spent over a year making sure that community foundation staff and board members understood: 1) the importance of deciding as a field what level of branding and what type of common identity they wanted; 2) why standards are important; 3) the relationships among marketing, standards and branding. This was a time consuming process, but was critical to the acceptance of standards, a common identity system and to the ultimate success of the Professional Advisors Campaign. Community foundations whose boards did not buy into the decisions made by the field chose not to participate in state-wide marketing efforts. These were typically very small community foundations who chose not participate in the technical assistance seminars where shared understandings were developed.

- ◆ **Linking standards compliance to participation in the Professional Advisors Campaign or some other carrot provides an incentive for community foundations to meet standards.** Community foundations were sent the Professional Advisor marketing tools only after they had demonstrated that they were in compliance with standards. Community foundations wanted these tools and met standards very quickly.
- ◆ **Provide multiple venues for local boards to learn about and to discuss branding, standards and marketing.** Involvement in key decisions was critical to gaining board members' buy-in and their support for state-wide marketing efforts. On-site consultant visits, a short video explaining the issues behind branding, standards, common identity and marketing with discussion questions, and the materials available on CMF's website were very important in developing common understandings throughout the community foundation field in Michigan. Executive directors were not equally adept and comfortable with finding materials on CMF's website, so having a range of methods available to access information was helpful.
- ◆ **Clarify the requirements for affiliates meeting standards early in the process.** This occurred in Michigan after it was discovered that community foundations were unclear about how to involve their affiliates.
- ◆ **On-going technical assistance needs to be available to help community foundations meet and implement standards.** Meeting standards is only the beginning of the process. Systems and resources need to be put in place to operationalize standards.
- ◆ **Develop ways to obtain on-going feedback from the field and processes for linking information into the planning process.** The Outreach to Professional Advisors Campaign had a state-level team comprised of CMF staff, Williams Group, and FERA. Evaluation was integrated into the planning, development and implementation phases of this initiative early on. Adjustments and changes were made along the way based on data coming back from the field. Formative evaluation allows adjustments in the initiative to be implemented and the initiative to be strengthened.

Outreach to Professional Advisors

Educate First

- ◆ **Community foundations need to be marketing organizations and to have an infrastructure for marketing in place before they can make effective use of marketing tools.** Community foundations received five months of training to learn about the campaign components and tools and create individualized marketing strategies to leverage the state-wide campaign.
- ◆ **Community foundation boards have to be involved in the process and need to understand the issues and linkages related to standards and identity.** This includes outlining the the risks as well as the benefits. They also need to understand how state-wide activities create local benefit and how to maximize this benefit through coordinated activities locally.
- ◆ **Board members need to be educated about the importance of marketing.** If they do not view marketing as a valuable activity they will not approve sufficient resources (budget and staff time). Bringing the learning to the board room was important and needed to be facilitated with video and PowerPoint® tools.

Provide Technical Assistance

- ◆ **Technical support needs to be available.** Don't assume that community foundations will know how to use technology. Community foundation staff members need to have the skills to use the products. In Michigan, these individuals had varying degrees of comfort and experience with using technology.
- ◆ **Use a range of technical assistance delivery methods to reach the field.** It is difficult to get board members to attend training sessions especially if they require travel and one or more days of their time. On-site consultant visits, a video and materials on CMF's website were very important to developing common understandings throughout the community foundation field in Michigan.
- ◆ **Offer assistance with tool customization.** Customizing the marketing tools was a challenge for many community foundation staff. They did not have the expertise in house to customize the tools. Some used the assistance offered by CMF. This included pre-printed tools that community foundations could order through CMF and run through their laser printer to add their logo and contact information. It also included identifying a resource that would help a community foundation with customization and production issues. Others drew upon local resources, such as local graphic designers and print venders.

Recognize and plan for different learning styles

- ◆ **Individuals have different learning styles.** Providing information and guidance via printed materials – in hard copy or via the Internet was one effective way to share information. Providing opportunities for community foundation staff to share and discuss local activities and best practices face-to-

face also proved to be very valuable to community foundation staff and board members. These networking opportunities included the *Building Foundations* series, the CMF annual conference, and the CMF annual community foundation CEO retreat. The regional Team-up meetings also provided opportunities to network and collaborate with colleagues with similar goals and local issues.

Know that community foundations of all sizes can benefit

- ◆ **Community foundations of all sizes can implement and benefit from the advisors campaign.** Larger foundations are typically able to do more local activity. Community foundations' asset levels tend to correspond with the extent to which they have implemented the Professional Advisors Campaign at the local level. While the toolkit provided tools, each community foundation still needed required staff time and additional financial resources for local implementation (ad placement costs, printing/production cost, event related costs, etc.).
- ◆ **Be sensitive to the needs of community foundations located in small towns and rural areas.** These community foundations may not have access to an LCD projector for PowerPoint® presentations or they may not have a local copy center or printing resource that can assist them with print production. Offer suggestions for using the tools in ways that meet their needs (e.g., having the PowerPoint slides converted to overheads, using laser printouts of the presentation for one-on-one conversations, providing pre-printed tools, providing contacts and resources to help with print production, etc.)
- ◆ **Don't assume that one size fits all.** Each community foundation will implement the advisors campaign in very different ways. For example, in some communities all the advisors are local; in other communities, individuals may use advisors from the nearest metropolitan area; still others have a mix. Some communities have access to many sources of media that overlap with other community foundation service areas. Others don't have a local TV or radio station or local newspaper.

Plan for effective dissemination

- ◆ **Promote only what the community foundations can deliver.** For example, if you advertise charitable remainder trusts, community foundations must have the capacity to accept and administer those trusts. In Michigan we found that the field needed training and technical assistance in many areas of planned giving, marketing and communication. Consistent performance is critical when the field is moving toward a common brand.
- ◆ **Ensure community foundations have local marketing plans developed before implementing a statewide campaign.** To help ensure community foundations understood the marketing toolkit components and how to produce and use them and were prepared to leverage the statewide promotional activities on a local level, CMF developed *Building Foundations*. This marketing capacity building series helped community foundations understand

the campaign, how to leverage it on a local level and assisted them in developing plans for local activities.

- ◆ **Carefully coordinate the timeline for state-wide and local activities.** For example, in Michigan, community foundations needed to have the advertisements at least two months before the state-level ads were placed to get advertisements placed in local publications.