

The Four Ps of Marketing

*A Road Map to Greater Visibility
for Community Foundations*



Williams Group



The Four Ps

of Marketing for Community Foundations

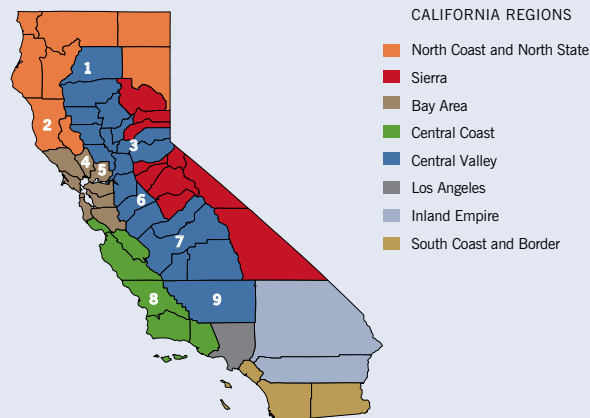
- PERSONAL CONTACTS
- PROFESSIONAL ADVISORS
- PARTNERSHIPS
- PUBLIC AWARENESS

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PROJECT PARTICIPANTS

The model and approaches presented in this paper have been developed in conjunction with the nine original participants in The James Irvine Foundation *Community Foundations Initiative II*, as well as from insights generated through engagement of field members across the United States.



Community Foundations Initiative II Sites

- 1 Shasta Regional Community Foundation
Redding, California
- 2 The Community Foundation of Mendocino County
Ukiah, California
- 3 Placer Community Foundation
Auburn, California
- 4 Napa Valley Community Foundation
Napa, California
- 5 Solano Community Foundation
Fairfield, California
- 6 Stanislaus Community Foundation
Modesto, California
- 7 Fresno Regional Foundation
Fresno, California
- 8 San Luis Obispo County Community Foundation
San Luis Obispo, California
- 9 Kern Community Foundation
Bakersfield, California

Additional Inputs

Leaders of the following community foundations vetted this paper and contributed inputs prior to publication.

- Ann Arbor Area Community Foundation (MI)
- Barry Community Foundation (MI)
- Community Foundation for Palm Beach and Martin Counties (FL)
- Community Foundation of Greater Flint (MI)
- Community Foundation of Lorain County (OH)
- Community Foundation of the Lowcountry (SC)
- Greater Everett Community Foundation (WA)
- Heritage Fund — The Community Foundation of Bartholomew County (IN)
- The Community Foundation of the Holland/Zeeland Area (MI)
- Parkersburg Area Community Foundation & Regional Affiliates (WV)
- Community Foundation of Johnson County, Inc. (IA)
- Telluride Foundation (CO)
- Triangle Community Foundation (NC)

Foreword

Community foundations make up one of the fastest growing sectors of philanthropy, with more than 500 new community foundations created across the United States in the past 20 years.

We believe this exponential growth and increased profile is because community foundations are being recognized for their unique value to the communities they serve. These essential public institutions actively grow the charitable resources available to a community, connect donors to the areas of greatest need and seed projects that lead to more vibrant communities. To do this effectively, however, community foundations must learn how to market their organizations and build relationships with a wide array of individuals and groups, a particularly challenging endeavor for younger and smaller community foundations.

Since 2005, The James Irvine Foundation has worked closely with a set of California's most rapidly growing community foundations through our *Community Foundations Initiative II*, investing \$12 million to accelerate their growth and leadership potential. This group has experimented with a marketing "roadmap" for community foundations which was developed by Williams Group, a communications firm steeped in service to the philanthropic sector. Those lessons have been packaged into this marketing toolkit that seeks to answer critical questions such as: How can small but growing community foundations best use their limited marketing budgets? What audiences should they target first?

In publishing this model, we aim to equip more community foundation leaders with the knowledge, structure and confidence to employ effective marketing strategies in service of their missions, ultimately improving the quality of life in the communities they serve. We welcome your thoughts and reactions to this report and we look forward to hearing your marketing success stories.



James E. Canales

President and Chief Executive Officer
The James Irvine Foundation
January 2011

Context

Community Foundations Initiative II

The James Irvine Foundation launched its *Community Foundations Initiative II* in 2005. This six-year effort involves a \$12 million investment to accelerate the growth and leadership of a set of small and emerging community foundations in rural areas of California. The initiative provides three types of support:

- Direct grants for core operating support and self-identified projects that build organizational infrastructure
- Regranting funds for Youth or Arts programs to help each community foundation develop capability as a grantmaker
- A strong program of technical assistance as well as a learning community that helps community foundations gain from each other’s successes and challenges

Community Foundations Series

This initiative has generated a significant body of knowledge that can benefit the larger field of community foundations, and that holds particular relevance for the youngest and smallest members of the field. This information is captured and shared through the Irvine *Community Foundations Series*.

Visit www.irvine.org/communityfoundations to download these publications



Growing Smarter
Achieving Sustainability in Emerging Community Foundations



Reaching Out
Board Ambassadors for Growth in Community Foundations



The Four Ps of Marketing
A Road Map to Greater Visibility for Community Foundations

The Four Ps of Marketing: About this paper

Participants in the *Community Foundations Initiative II* recognize the value of a defined marketing roadmap that helps them increase visibility with target audiences. They also recognize the utility of building this roadmap with “4 Ps” that offer a framework for success: personal contacts, professional advisors, partnerships and public awareness.

This paper presents a description of each of these four elements, accompanied by examples and practices drawn from the experience of nine California community foundations. It helps users translate this information into action through a set of worksheets tested over the course of the *Community Foundations Initiative II*.

The Four Ps of Marketing is intended to provide community foundation staff and volunteers with an effective, dynamic model accompanied by straightforward tools that can be applied to boost awareness and growth for their organization.



Key questions

Where should our community foundation invest its limited marketing budget?

How much should we invest?

How do we know if we are getting our money's worth?

These questions are on the minds of community foundation executives and boards, and can challenge even the savviest marketers in the field. Here is why...

In the community foundation world, elevator messages can require long rides to deliver. Target audiences can be elusive to pinpoint. The “sales cycle” (time from first introduction to major gift) can take decades. And meaningful metrics can be tough to define.

All of these challenges float in a sea of change. The economy declined sharply beginning in 2008 and still remains volatile. The growth of charitable gift funds has transformed the arena of donor choice. The realm of planned giving, once a domain of distinction for community foundations, has opened up as more nonprofits offer more sophisticated philanthropic products. Online giving, fueled by a marked preference for personal control of gift dollars, is providing remarkable new options in the laptops of donors.

What can a community foundation — especially a smaller or newer one — do with its valuable but complex set of capabilities in such a crowded market?

In a nutshell, market itself. Strategically.

Introducing the Four Ps

Recasting a classic model for today's community foundations

If you took a business class anytime after 1960, it's likely you've been introduced to the Four Ps that are fundamentals of marketing: Product, Price, Place and Promotion.¹ Since that time, countless students, strategists, entrepreneurs and chief executives have mixed these ingredients in the recipe for marketing success.

This classic structure inspired a very different set of Four Ps developed for, and in use by, community foundations. The model gives home to four categories of activity that can spell success in a challenging marketplace.

- **Personal contacts:** making use of your existing networks to gain new relationships
- **Professional advisors:** connecting to new donors through the people already involved in planned giving
- **Partnerships:** joining forces with others to access target audiences
- **Public awareness:** gaining recognition of your identity and impact

These four approaches combine proven and promising community foundation practices. Together they form a core structure that can anchor planning, implementation and measurement of local marketing investments.



mar·ket·ing, n.

The process or technique of promoting, selling and distributing a product or service.

In a word, it's about understanding. More specifically, marketing is the continuous process of your community foundation understanding its target audiences and, in turn, helping those audiences understand your community foundation.

Marketing supports, but is not the same as, development. Development is the ongoing process of cultivating individual donors. Marketing helps you identify prospects as well as initiate and reinforce relationships as those prospects become loyal donors.

¹ The Four Ps of the corporate marketing mix are usually attributed to E. Jerome McCarthy, building on the work of James Culliton, Neil Borden and others.

Personal Contacts

FORMING NEW RELATIONSHIPS THROUGH EXISTING NETWORKS

Chances are, your community foundation came to be because a small number of community-minded philanthropists talked with each other about a good idea. The best way to expand this idea is to keep talking about it. Staff, board, donors and other volunteers are the most effective — and necessary — marketers for the community foundation.

The strength of the community foundation construct is its ability to flex. Community foundations can respond to the unique, changing needs of their communities. And they are able to design giving approaches that match the unique interests and financial circumstances of donors. A community foundation is a dynamic entity able to address a wide range of donor requirements. In other words, it offers a highly personal approach to giving.

The best way to deliver this message is, therefore, in a personal context. And the best way to arrive at this context is through a personal introduction. It is within this context that an individual donor's motivations and passion for community can be understood — and that the full range of community foundation capabilities can be focused on a specific, tailor-made solution.

So the place to begin marketing efforts is by identifying and appropriately mining the networks and relationships that already exist among your board, staff, donors and others in the community foundation family.

Here are three questions to help you know if you are making the most of personal contacts

1. Has every one of your board members introduced the community foundation to donor prospects and community leaders in her/his networks?
2. Do your donors have, and participate in, opportunities to introduce their friends and colleagues to the community foundation?
3. Do you have a steady stream of new donor prospects to meet with each month? Is the volume of this stream proportionate to your size and ambitions?

For example, the Napa Valley Community Foundation, with approximately \$20 million in assets, works to ensure that the CEO has at least five introductory meetings with potential major givers each month. The CEO of the Kern Community Foundation, with approximately \$14 million in assets, meets with at least two current or prospective donors per week.



Holding the keys to growth

Board members hold the keys to growth in just about every community foundation. Their networks can readily bring the organization in touch with the right donor prospects as well as professional advisors (see next section).

Five ingredients are essential to getting the most from board members as ambassadors for the community foundation.

Expectations: a shared understanding that ‘friend-raising’ is an essential, and measurable, part of governance responsibilities

Education: knowledge to represent the community foundation accurately, and confidently

Equipment: messages, stories and tools to facilitate introductions

Experiences: opportunities to talk about the community foundation with target audiences

Environment: a nurturing internal culture that encourages this external activity

Talk with your board about these areas — reflect on where your strengths and weaknesses lie regarding each of these points. Consider the best ways to enhance your standing and measure progress in each category.

The lessons you learn developing board ambassadors can be applied to enhance the networking already conducted by staff, and to inform strategies for making new contacts through other community foundation volunteers as well as loyal donors.

For example, the Fresno Regional Foundation held a special “board ambassador” day. Board members gathered throughout the day — meeting in groups of four or five for 90 minutes, with the CEO, to share experiences and ideas for increasing their effectiveness as ambassadors. All then convened at day’s end for a reception and collective call to action.

Good resource



Reaching Out

This paper contains information, examples and tools your community foundation can use to strengthen board ambassadors. Available at www.irvine.org/communityfoundations

Professional Advisors

CONNECTING TO NEW DONORS THROUGH A PROVEN CHANNEL

When it comes to charting investments in community foundation marketing, one audience produces the best return on investment: professional advisors.

A two-part reality is behind this statement. Wealthy individuals use advisors for estate and tax planning, which can lead to recommendations resulting in a charitable gift. Plus, the largest gifts received by community foundations are almost always planned gifts that require the involvement of a donor's professional advisor.

In many ways, community foundations and professional advisors are natural allies in serving donors who want to serve community. And, while not every advisor is looking for a relationship with a community foundation, there is much good news on this front:

- Community foundations have demonstrated the ability to develop win/win relationships with professional advisors, and have received significant referrals to new donors through these relationships.
- Professional advisors have demonstrated their willingness to work in tandem with community foundations to provide planned giving services to clients, and have benefited from introducing their clients to a qualified local philanthropic resource.
- Professional advisors, particularly those most involved in planned giving, are relatively easy for community foundations to identify and reach.

The idea behind marketing to advisors is simple — get to know the few people who already know most of the potential major donors you want to meet.

Who are they? Professional advisor categories...

- Attorney (estate): Estate and tax planning, wills, trusts, financial planning, consultants
- Attorney (general): Business and family legal consultation, estate and tax planning, wills, real estate transactions, business sales
- Accountant: Tax planning and returns, business consultation, financial planning
- Banker/Trustee: Banking and investment services, long-term trust administration, private banking
- Life Insurance Agent: Life insurance, financial planning, evolving lifetime products
- Financial Planner: Financial planning, retirement income planning
- Broker: Investment services, portfolio management, financial consultation

Here are three questions to help you know if you are making the most of professional advisor contacts

1. Can you name the five top individuals as well as the five top firms that serve high net worth people in your community? Would these individuals or firms return your phone call?
2. Do you have a set of key advisors who counsel and support you in your efforts to build planned giving relationships with more professionals?
3. Do you receive a steady stream of inquiries and referrals from professional advisors in your community? Is the volume of this stream proportionate to your size and ambitions?

For example, the Placer Community Foundation, with approximately \$5 million in assets, seeks to generate at least five referrals per quarter from professional advisors.

Winning relationships

While it might be hard to know everything about every advisor in your region, it's likely you can pinpoint a few central figures to get the ball rolling with this audience (see "Getting started" on next page).

Once you've identified a few key individuals, you can:

- Ask for an appointment to introduce your community foundation as a potential resource for the advisor (better yet, find a board member with access to this advisor to help make a meeting happen)
- Conduct an informal introduction and provide foundation materials, encouraging the advisor to contact you should s/he encounter a planned giving opportunity involving the community
- Add the advisor to your database
- Maintain regular contact through ongoing information sharing (print and/or electronic) as well as periodic meetings; many community foundations use a weekly newsletter from Crescendo to support ongoing contact
- Use case studies highlighting good outcomes achieved by advisors working with community foundations, as well as examples of specific planned giving solutions (such as the IRA Charitable Rollover) to enhance your position as a resource to the advisor

What am I looking for from a community foundation? Two things. Give me ideas that can excite my client, and demonstrate that you can administer my client's gift.

*Timothy H. Smallsreed, Attorney
Fitzgerald Abbott & Beardsley LLP
Oakland, California*

At the right time in the development of this relationship, ask for the opportunity to introduce your organization to colleagues in the advisor's firm, and invite the advisor to offer you advice and support in developing relationships with others in your region. Be sure to acknowledge and show your appreciation for any help provided along these lines. For example, some community foundations feature their "professional advisor partners" in newsletters, annual reports, on their website, etc.

Getting started

Consider advisors who focus on estate planning services and demonstrate involvement in community. And think about how you might already know or find some of these likely allies. Is the managing partner of a CPA firm involved as a board member in a nonprofit organization you have made grants to? Is there an estate planning attorney who is on the campaign committee for your local United Way?

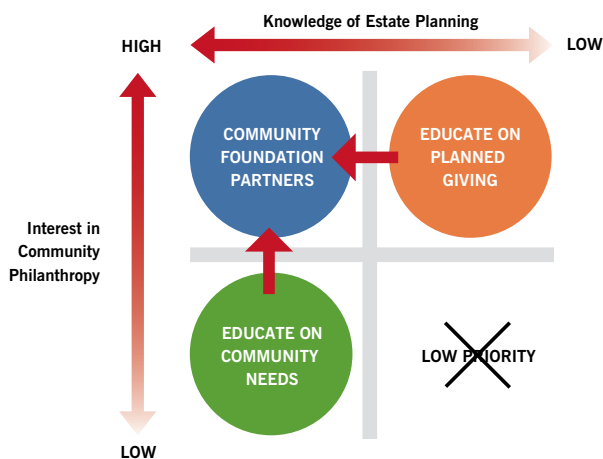
Over time, you can create paths to help other advisors gain knowledge of community needs and/or planned giving. For example, some community foundations sponsor programs on planned giving that qualify for continuing education credits required by professional associations.

Segmenting professional advisors

All advisors can be placed somewhere in the matrix below, based on their degree of interest in community philanthropy, and their level of knowledge of estate planning. Of course, the highest priority for community foundation marketing is those advisors who rate high in both categories. Moving beyond this upper left quadrant, community foundations can:

- Work with those who have high knowledge of estate planning/low interest in community philanthropy, by helping them better understand community needs
- Work with those who have high interest in community philanthropy/low knowledge of estate planning, by helping them better understand planned giving opportunities

The remaining quadrant (those with low interest in community philanthropy/low knowledge of estate planning) represents the lowest priority for community foundation marketing.



Good resource



The Professional Advisor Portfolio
 This resource includes research, strategies, worksheets, messages and tools that can support your work in this area. It's part of the National Marketing Action Team resource bank. Available at www.cfmarketplace.org through the Council on Foundations.

Partnerships

JOINING FORCES TO ACCESS NEW AUDIENCES

Today, more community foundations are pursuing partnerships as a promising vehicle for growth.

The term covers a range of relationships that share a common denominator: the community foundation joins forces with another organization or network, and offers value while also gaining access to a desired population already served by this entity.

In other words, it's about borrowing an audience. Here are some concrete examples, from simple to involved:

- **Napa Valley Community Foundation** partners with the Napa Valley Vintners Association to co-host quarterly meetings for community donors. This sponsorship allows the community foundation to introduce itself and provide information on local issues to high net worth individuals — and to add these contacts in its database.
- **Shasta Regional Community Foundation** is in a partnership with local advisors authorized to broker American Funds. These advisors can help their clients work with the community foundation to establish endowed donor advised funds, with endowed assets managed by American Funds. This arrangement allows the community foundation to offer a product to the advisor audience that enables these professionals to stay involved in the management of client funds used for charitable purposes.
- **Community Foundation Sonoma County** explored a partnership with United States Artists, whereby this national arts organization conducted a pilot program to attract new Sonoma County donors to provide direct funding to artists. The community foundation sponsored the program locally, and introduced existing arts donors to this opportunity. In turn, the community foundation sought to gain visibility for its work in the arts and come to the attention of new donors by virtue of its association with the well-respected United States Artists organization.

Here are three questions to help you know if you are positioned to make the most of partnerships

1. Does your community foundation get approached by respected community organizations and groups with requests to lend your name and credibility to their work?
2. Do you know which organizations serve the highest concentration of prospective donors you seek to target?
3. Have you gained initial experience with partnerships through relatively simple, low-cost, low-risk endeavors?

Some cautionary considerations

Keep these points in mind as you consider and conduct partnerships:

Protect your brand. Don't consider partnering with an organization that is not well governed, well run and well regarded. And be very clear up front about ways your community foundation identity can and cannot be used in joint marketing.

Know your capacity. Be crystal clear with regard to the responsibilities you are undertaking as part of any partnership. Define the resources required to support your contribution, and realistically assess the availability of these resources.

Gain a meaningful commitment. Watch out for lopsided arrangements in which your community foundation gives more than it gets. Make sure you know exactly what your partner is expected to produce, and that these outputs are clearly stated and agreed to by all parties.

Look sideways, and think ahead. Picking one partner may mean leaving another on the sidelines. Evaluate whether your choice of partners might alienate others, and know how you would manage or prevent any potential tensions. And chart the long view, especially if the partnership involves a multiyear commitment: Will we be happy with our decision five years from now, when we are likely to be a larger and more sophisticated organization? Do we have ways of appropriately exiting the partnership if such action is warranted?

Do a value equation. Consider the expected return and likely investment related to each partnership opportunity. Ask the question: Of all the options we have, does this partnership represent a strong strategic decision for our organization?

First steps

If you are new to the partnership concept as a way to extend your marketing reach, you might take these simple steps:

- Identify organizations whose interests align with yours relative to building community and growing community philanthropy. The list may range from your local chamber of commerce to an area nonprofit association, from the county bar association to city government. Ask to be linked to their local website under a heading such as “Community Philanthropy.” In return, you might offer to make a presentation on “the state of local giving” at one of their meetings or events.
- Think about ways to make any existing or future sponsorships more strategic in their benefits to you. For example, if you participate in sponsoring a local event, pursue all appropriate activities that help you make contact with audience members — from finding a place at the podium so you can introduce the community foundation to gaining access to the roster of event attendees.

Once you become alert to opportunities and gain experience in this arena, you can naturally identify the right path and speed for developing your organization's strategies for partnerships that help you connect with new audiences.

Good resource



The Financial Institutions Portfolio

This resource kit has research, strategies, worksheets, sample agreements and tools that can support partnerships. It's from the National Marketing Action Team. Available at www.cfmarketplace.org through the Council on Foundations.

Public Awareness

GAINING NEW RECOGNITION OF YOUR IDENTITY AND IMPACT

Staff and board want to build name recognition, generate credibility and increase the magnetic pull of the community foundation with all population segments. As a result, the public awareness category often gets most of the marketing attention — and budget.

This area represents the traditional domain of community foundation marketing — in the 1980s and 1990s, many established their first-ever marketing budget line item to create an annual report. Today, websites vie for primacy in the communications mix. Other popular vehicles include press relations and media outreach, newsletters, presentations, advertising and direct mail. Also included here is the variety of collateral materials (fund overviews, donor testimonials, case studies, etc.) that support the broad range of community foundation communication practices.

If public awareness is so important to organizational leaders, why does it occupy the fourth and final slot in this marketing model? It's a question of balance. There can be a tendency for community foundations to over-emphasize, and over-invest in, public awareness activities.

Awareness building alone cannot be relied on to generate new giving. A focus on building awareness that is not accompanied by an equal emphasis on other elements of the mix — in particular personal contacts and professional advisors — will come up short with regard to growing the community foundation.

It's a question of balance. Awareness building alone cannot be relied on to generate new giving.

It is rather hard to imagine anyone being introduced to a community foundation via a billboard and deciding on the spot to open a large donor advised fund. Unlike retailers — and many nonprofit organizations focused on a single cause — community foundations cannot expect to attract first-time customers through mass communication. The community foundation product is too complex, and its best applications are highly personal in response to individual donor passions and circumstances.

So, what is the role of public awareness in the community foundation marketing mix? It is to achieve these ends:

- Increase name recognition of the community foundation across all audience groups
- Deepen understanding of the community foundation (specifically, its capabilities and impact) among those who already know the organization
- Reinforce the giving decisions made by existing donors, and fortify ongoing relationships with donors and professional advisors (everyone likes to work with an organization that is popular and significant in the community)

Here are three questions to help you know if you are making the most of public awareness investments

1. Do you review each new communication product with staff and board members before going public? This step can ensure that all are prepared to comfortably engage audience members with the content of these communications — and that all public awareness efforts can directly support your success with personal contacts.
2. Do you connect messages across media? Do all your communications paint a consistent picture of your community foundation? Is it easy to tell that they all come from the same source?
3. Do you measure success? Many community foundation investments go into the public awareness category, which is generally the most expensive to fund and the hardest to measure. Despite this circumstance, you can always establish some key indicators that help you know whether you are getting a return on these investments. For example, how many seconds of air time or publication inches did your latest news release generate? How many people responded to a survey included in your latest newsletter? Or went online to a special web page featured in your latest ad? Defining expected outcomes allows for each expense to be weighed more objectively; tracking results allows for learning and improvement to take place.

Social media: It’s about growing, and using, community foundation networks for good

Social media is a highly dynamic, rapidly growing area of interest — and activity — for community foundations. It advances both public awareness and personal connections, because it enables your organization to come in contact with new audiences while also making it easy for all audiences to interact with you.

Let’s start with a simple definition: Social media describes electronic communication platforms that allow audiences to receive content from your community foundation and engage with it — by making a comment or adding to it, by including it in communications of their own, or by sharing it with people in their networks. In other words, social media helps your community foundation strengthen relationships with current constituents — and gain access to people you don’t know who are in contact with your current constituents.

Social media spans multiple categories ranging from email to social networking services such as Facebook® and LinkedIn®, to sharing services such as YouTube™ and Flickr®, to blog sites and micro-blog services such as Twitter®.

Community foundations are employing social media in a variety of ways. Here are a few current examples...

<p>Placer Community Foundation This community foundation sustains a lively Facebook page, and promotes this page to attract new fans to the organization. http://www.facebook.com/pages/Placer-Community-Foundation/158251810652</p>	<p>Napa Valley Community Foundation This community foundation uses YouTube to host a series of videos, which are also embedded as video content directly on its website. http://www.youtube.com/user/TerenceCFNV</p>	<p>Fresno Regional Foundation This community foundation publishes a Twitter feed on its homepage, sharing brief, timely updates on its daily activities in the community. http://twitter.com/#!/FresnoRegFound</p>
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Doing more with social media

The social media arena is attracting lots of attention and experimentation in the field today. A series of social media considerations for community foundation leaders follows.

Stay strategic. Connect social media to your marketing plan. Use social media tools with a clear intent — specifically, be sure to define the audience and purpose for each application.

Go where your audience is. Don't expect anyone to initiate participation in a social media service because you are on it. If the people you care about are on Facebook, then a Facebook page may be a good way to connect. Conversely, if your audience is not already on Facebook, a low response to your new page is quite likely.

Drive traffic to your website. Make your website the hub for all social media. Embed services such as Facebook or YouTube directly onto the site. For each application, always feature a call to action that takes audiences to your website for relevant information, resources or activity.

Set expectations. Social media takes time. Social presence and network development are accomplished through regular — and authentic — communication. Expect to post regularly (from a few times a day to once a week, depending on the application and opportunity) and to monitor and respond to activity in a timely manner. Gauge the amount of time you want to invest with the goals you seek — and with the availability of staff who have the technical and strategic communication skills to help you establish the right social media presence.

Stand for brand. Social media leads audiences to form perceptions about your community foundation. All applications should reflect your desired attributes and values (e.g., professionalism, leadership, integrity, transparency). Plus, they should make appropriate use of your brand identity (logo, colors, typography, etc.).

Know the limits of control. It's about listening. While social media communication may begin with broadcasting, the whole idea is to hear back — and to build relationships by respectfully allowing others to express themselves. Anticipate that some audience members will comment on and add to conversations in ways that are outside community foundation control. Develop internal guidelines and practices for responding in proactive ways to all feedback — positive and negative.

Use measurements. Track social media effectiveness. Progress against defined goals can be monitored in a variety of ways — website analytics, search engine rankings, responses to event invitation emails, etc. Your metrics can be as simple as measuring an increase in “friends” over time, tracking the number of comments or reposts, or measuring the number of audience members who arrive on your website from a social tool.

Think about connections. Develop a perspective on the social networks of individuals affiliated with the community foundation. For example, executive staff and board members could incorporate their community foundation roles in their personal Facebook or LinkedIn profiles. Be aware that employees do have social networks, and encourage people to use the same integrity in representing themselves online as in the offline world, e.g., making wise use of privacy options, being thoughtful in posting comments online. Consider creating a social media policy to guide staff and board activity.

Ask the experts. The social media landscape is changing rapidly. Engaging a consultant can be a good investment in helping you build an external strategy and internal capacity. Many communications firms now have specialists in this domain.

Local media partners

Community foundations have natural appeal for local newspapers, radio and television outlets. Many media services are willing to run community foundation Public Service Announcements, to supply discounted or free advertising, or to offer ongoing opportunities for special coverage. For example, Susanne Norgard, executive director of The Community Foundation of Mendocino County is a regular contributor to the *Ukiah Daily Journal*, with a column on local giving and the nonprofit sector. Napa Valley Community Foundation provides a media release announcing the awards made at conclusion of each of its grant cycles; these new grants typically receive local press coverage.

Simple, low-cost, everyday market research

You can gain information from your market — and inform your public awareness strategies and messages — by asking some simple questions of people in your community.

- Have you heard of the community foundation?
- If yes, how did you first hear about us?
- What do you know about us?
- (For donors) Why did you choose to give through us?

Chances are, your community foundation staff and board are in contact with community members on a daily basis. Empowering all to pose these questions, and to share the responses they hear with others inside your organization, is a great way to stay in touch with your audiences and learn more about how your community foundation is known.

Good resource



The Market Readiness Portfolio

This resource includes a range of additional tools you can use to support internal discussion and alignment regarding marketing, and to enhance your planning and implementation activities. It features customizable communications developed by and for the community foundation field. **Available at www.cfmarketplace.org through the Council on Foundations.**

WORDS OF WISDOM

Don't forget the fifth P – patience!

VERONICA BLAKE, CHIEF EXECUTIVE OFFICER
PLACER COMMUNITY FOUNDATION



Going to work

This section provides additional ideas and practical tools to help you build and conduct your marketing program.



CAPACITY ASSESSMENT

Ready. Or Not?

Does your community foundation have the capacity to do marketing work well? How do you know? This seven-point assessment can help you chart your readiness.



MARKETING PLAN

Prepare to Succeed.

Does your community foundation have a marketing plan? Is it strategic? Is it practical? This straightforward planning process can help you define the right path forward.



PROJECT INITIATION

Start Smart.

Does your community foundation have an effective way to begin communications projects? This project initiation protocol can help you get the most from each new investment.



MESSAGING STRUCTURE

Mind the Words.

Does your community foundation have a set of core messages that are consistently applied in all communications? This template can help your team create — and align around — key expressions of your work and value.



PROGRESS REPORT

Keep Up.

Does your community foundation have an ongoing method for reporting status against your marketing plan priorities? This tracking tool can help you keep your work visible — and sustain progress.



AWARENESS AND PERCEPTIONS

Build Brand.

Does your community foundation get the most from its brand? These tips and questions can help you build stronger awareness and perceptions with the audiences you care about most.

Ready. Or Not?

Capacity assessment

Community foundations have learned that the ability to be effective and efficient with marketing involves a variety of elements.

Rating yourself against seven important components can help you assess your readiness to succeed with your marketing program. These components involve core messages, target audiences, research, objectives, strategies and tactics, process and internal responsibilities, and resources.

A sample assessment follows:

RATE YOUR ORGANIZATION AGAINST THE FOLLOWING STATEMENTS	ABSOLUTELY NOT TRUE	ABSOLUTELY TRUE
Use the space provided to add comments supporting your rating		
1. We have core messages that consistently describe our distinct features and benefits.	1 2 3 4 5	
2. We have clearly defined target audiences.	1 2 3 4 5	
3. We conduct ongoing research into the needs, values and perceptions of our target audiences.	1 2 3 4 5	
4. We have quantifiable marketing objectives for each target audience.	1 2 3 4 5	
5. We have defined strategies and tactics for achieving these objectives (i.e., "a documented plan").	1 2 3 4 5	
6. We have a defined process and assigned responsibilities for managing plan implementation.	1 2 3 4 5	
7. We have marketing resources (staff, budget, products, tools, technology) that are sufficient to reach our objectives.	1 2 3 4 5	

The following page includes a worksheet you can use to conduct your own assessment. It can be helpful to have staff and board members complete this assessment individually, then share and discuss their assessments as a way to form a collective assessment, and to set priorities for working on improving key areas of capacity.

Related, community foundation leaders can reflect on collective ratings and ask:

- What areas should we focus on based on our assessment?
- What progress might we expect to make in the next six months in each area?
- What specific actions should we take to achieve this progress?

Capacity assessment

RATE YOUR ORGANIZATION AGAINST THE FOLLOWING STATEMENTS	ABSOLUTELY NOT TRUE					ABSOLUTELY TRUE				
Use the space provided to add comments supporting your rating										
1. We have core messages that consistently describe our distinct features and benefits.	1	2	3	4	5					
2. We have clearly defined target audiences.	1	2	3	4	5					
3. We conduct ongoing research into the needs, values and perceptions of our target audiences.	1	2	3	4	5					
4. We have quantifiable marketing objectives for each target audience.	1	2	3	4	5					
5. We have defined strategies and tactics for achieving these objectives (i.e., “a documented plan”).	1	2	3	4	5					
6. We have a defined process and assigned responsibilities for managing plan implementation.	1	2	3	4	5					
7. We have marketing resources (staff, budget, products, tools, technology) that are sufficient to reach our objectives.	1	2	3	4	5					

Prepare to Succeed.

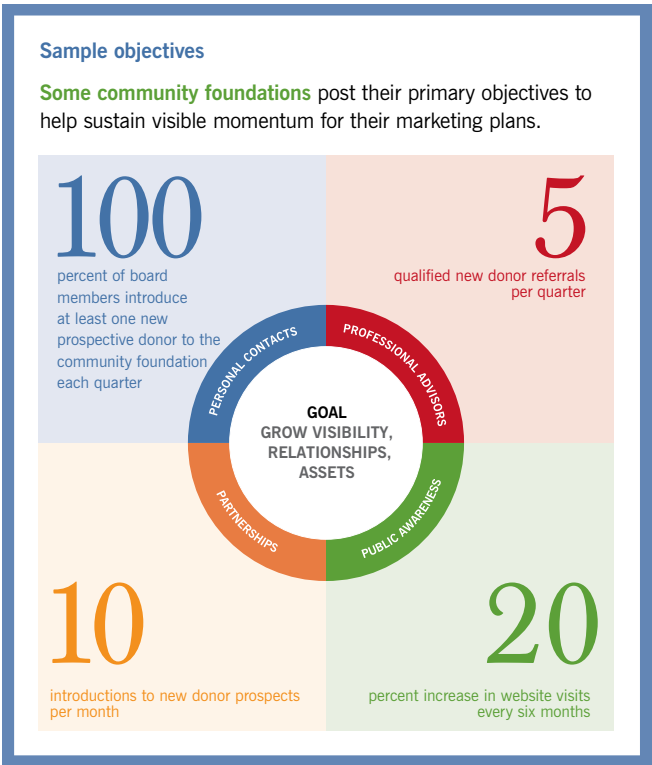
Marketing plan

Building a plan is the single most important activity in effective marketing. Community foundations have learned that planning requires considerable analysis and thought, but can be simple in form.

The best plans are clear and easy to understand. And they involve a set of related components:

1. **Determine your goals.** What are your most important marketing results? For many community foundations, primary goals involve growing visibility, relationships and assets. Of course, these marketing goals should nest snugly within the community foundation’s overarching strategic direction and plan.
2. **Define objectives.** What specific and measurable achievements will fulfill your goals? Here you can use the Four Ps framework to get organized (see illustration below).
3. **Set strategies.** What are the primary methods or approaches you will use to achieve your objectives with each audience?
4. **Describe tactics.** Which tools or activities will be required to support implementation of your strategies?
5. **Build budgets.** What resources — human and financial — will be needed to implement each tactic?
6. **Complete action plan.** Who will do what, by when, to complete each tactic?

For each objective, you can summarize your strategies, tactics, budget and action plan. An example follows, based on this sample objective: Receive 5 qualified new donor referrals per quarter from professional advisors. You will then find a worksheet you can use to document your own plans.



Marketing plan

OBJECTIVE: <i>Receive 5 qualified new donor referrals per quarter from professional advisors</i>			
	Completion Date	Responsibility	Budget
Strategy One: <i>Conduct lunch and learn with one firm per quarter</i>			
Tactic A: <i>Select key firms and schedule events for year</i>	Jan 30	Juanita	\$0
Tactic B: <i>Create presentation and handouts using NMAT tools</i>	Feb 15	Steve	\$500
Tactic C: <i>Conduct session (includes arranging lunch, final confirmation, follow-up notes)</i>	As scheduled	Steve & Juanita	\$100 per event
Strategy Two: <i>Hold individual meetings with two advisors per month</i>			
Tactic A: <i>Select two key advisors and invite to lunch or community foundation</i>	10th of each month	Juanita	\$0
Tactic B: <i>Identify and engage appropriate board member(s) in meeting</i>	10th of each month	Juanita	\$0
Tactic C: <i>Hold meetings (use handouts created in strategy one) and send follow-up notes</i>	As scheduled	Juanita	\$50 per lunch
Strategy Three: <i>Maintain four contacts per year with all advisors</i>			
Tactic A: <i>Purchase and maintain database and email distribution service: Constant Contact</i>	Jan 30	Steve	\$200 per year
Tactic B: <i>Create e-newsletters using NMAT content plus local features</i>	March September November	Steve & Juanita	\$300 per issue
Tactic C: <i>Distribute e-newsletters using Constant Contact</i>	March September November	Steve	\$0

Marketing plan

OBJECTIVE:			
	Completion Date	Responsibility	Budget
Strategy One:			
Tactic A:			
Tactic B:			
Tactic C:			
Strategy Two:			
Tactic A:			
Tactic B:			
Tactic C:			
Strategy Three:			
Tactic A:			
Tactic B:			
Tactic C:			

Start Smart.

Project initiation

Community foundations have learned that care in initiating new communications projects can help streamline internal processes and increase external results. Getting off to the right start helps you clarify direction and set expectations for each new expenditure.

In this way, taking time to engage all key internal stakeholders in thoughtful planning can pay big dividends. Here is a sample based on questions that can be used for any new project.

Target Audience
To whom is this communication addressed? Are there secondary audiences — in addition to this primary group? 1. <i>Current donors</i> 2. <i>Prospective new donor</i>
Objective
What is this communication expected to accomplish with our target audience? What is our specific project goal — to raise awareness, increase understanding, or change behavior? Is it measurable? <i>Educate and excite givers regarding new opportunities to make a difference in our community.</i>
Perception
What is the target audience's current knowledge/perception? What knowledge/perception is desirable? <i>Most are aware of some community needs, but lack understanding of the breadth and depth of community issues.</i>
Message
What is the key idea to be communicated which will accomplish our objective? <i>The community foundation is in touch with the community, and able to help donors do more to improve quality of life for others.</i>
Method
What is the most appropriate vehicle for delivering the message? What makes this vehicle most appropriate? Are other options worth considering for any reason (time, expense, impact)? <i>An electronic newsletter</i>
Other Requirements
What other requirements must the communication meet? Is there mandatory information to include? Is it connected to other communications? How do any connections affect project design and use? How will this communication be branded? <i>Content features and stories will be linked to our website. Website will include newsletter registration feature.</i>
Budget
What is the budget for this project? Is it realistic? <i>\$2000 for database and distribution service and first issue; \$1000 for each subsequent issue.</i>
Timeline
What is the project start date? Completion date? Other milestones? <i>First issue: September. One issue per quarter thereafter.</i>
Measurement
What is the measurement of success for this communication? Can it be quantified? <i>Initial distribution: 300 contacts; 25% open rate. One year: 500 contacts; 30% open rate.</i>

The following page includes a worksheet you can use to conduct project initiation. It is a way to help you establish a strategic focus and set the stage for measuring return on investment in each new communication.

Project initiation

Target Audience
To whom is this communication addressed? Are there secondary audiences — in addition to this primary group?
Objective
What is this communication expected to accomplish with our target audience? What is our specific project goal — to raise awareness, increase understanding, or change behavior? Is it measurable?
Perception
What is the target audience's current knowledge/perception? What knowledge/perception is desirable?
Message
What is the key idea to be communicated which will accomplish our objective?
Method
What is the most appropriate vehicle for delivering the message? What makes this vehicle most appropriate? Are other options worth considering for any reason (time, expense, impact)?
Other Requirements
What other requirements must the communication meet? Is there mandatory information to include? Is it connected to other communications? How do any connections affect project design and use? How will this communication be branded?
Budget
What is the budget for this project? Is it realistic?
Timeline
What is the project start date? Completion date? Other milestones?
Measurement
What is the measurement of success for this communication? Can it be quantified?

Mind the Words.

Messaging structure

Community foundations have found that developing and organizing major messages in a simple but comprehensive structure provides an ongoing platform for all communications. A messaging structure is a way to make sure that all high-level information about the community foundation — and its distinctive value and benefits — is captured in a way that is complete, concise and connected.

Below is a sample developed by the board and staff of The Community Foundation of Mendocino County.

Name	The Community Foundation of Mendocino County
Lead statement	Together we can do more for the communities we love.
Description	We are a nonprofit foundation created by and for the residents of this region.
Our role	We help people give back in ways that matter to them and in ways that strengthen local communities.
Our work	We partner with donors to serve community, providing resources and opportunities for communities and community organizations to grow stronger.
Three distinct donor benefits	<ol style="list-style-type: none"> We help you fulfill your vision. We help individuals, families and businesses fulfill their charitable visions in the communities they love. We facilitate complex forms of giving — including planned gifts and estates, and we have the ability to receive gifts of cash, real estate, securities or other personal property. We can help tailor giving approaches to match the unique interests and financial circumstances of each donor, while providing maximum tax benefit within state and federal laws. It's a highly personalized approach to giving. We help you get the most from your contributions. Our board, staff and regional advisors have in-depth knowledge of area needs — and of the programs and organizations that can make the greatest difference for people in communities throughout Mendocino County. We work on a local level, using our knowledge and our relationships to find the best return on every donor's investment in community. It's a highly effective approach to giving. We help you create a personal legacy. We are excellent stewards of endowment funds and administer these funds to improve lives today and in the future. We honor each donor's desire to make a lasting difference. It's a long-term approach to giving.
Ten reasons people choose to give	<ol style="list-style-type: none"> We are a unique vehicle for community philanthropy throughout this county. We are a local organization with deep roots in the communities we serve. Our board, staff and regional advisors have local expertise regarding community issues and needs. We are a trusted and respected grantmaker and convener working to empower people and communities. We tailor philanthropic services to each individual's charitable interests. We help people create a personal legacy by establishing permanent funds in their names. We accept a wide variety of assets, and can facilitate even the most complex forms of giving (including gifts of real estate). We offer maximum tax advantage under state and federal law. Our donor advised funds help people stay involved in the good works their gifts make possible. We partner with professional advisors to create highly effective approaches to charitable giving.

The next page features a template that can help you build your own messaging structure.

Messaging structure

Name	
Lead statement	
Description	
Our role	
Our work	
Three distinct donor benefits	1.
	2.
	3.
Ten reasons people choose to give	1.
	2.
	3.
	4.
	5.
	6.
	7.
	8.
	9.
	10.

Keep Up.

Progress report

Community foundations have learned that monitoring and reporting status against marketing plan priorities is an important way to keep focused on attaining goals. This tracking also naturally leads to improvement — as progress against key measures turns out to be simpler or harder than anticipated, it raises questions regarding new possibilities, as well as needed course corrections.

This tracking tool may help you keep your work visible — and sustain progress over time.

Four Ps	Key Measures	Annual Goal	Goal Prorated YTD	Actual YTD
Personal Contacts	<i>Board and staff meetings with donor prospects</i>	60	30	31
	<i>Additional prospects in database</i>	200	100	98
	<i>Written/personal contact with each donor</i>	4	2	2
Professional Advisors	<i>Board and staff meetings with professional advisors</i>	30	15	13
	<i>E-newsletters to professional advisors</i>	4	2	2
	<i>Mailings to professional advisors</i>	2	1	1
	<i>Referrals from professional advisors</i>	20	10	11
Partnerships	<i>Presentations at partner events</i>	4	2	3
	<i>Conduct philanthropy workshops for partner audiences</i>	2	1	0
	<i>Board and staff participation in grant check presentations</i>	12	6	6
Public Awareness	<i>Speaking engagements by staff and board</i>	16	8	7
	<i>Community events attended by staff and board</i>	28	14	11
	<i>Media placement/mentions</i>	24	12	13
Other	<i>Board members trained in use of core messages</i>	12	6	12

The following page includes a worksheet you can customize to support your own progress tracking.

Progress report

Four Ps	Key Measures	Annual Goal	Goal Prorated YTD	Actual YTD
Personal Contacts				
Professional Advisors				
Partnerships				
Public Awareness				
Other				

Build Brand.

Awareness and perceptions

What are you known for? Ask any target audience member what comes to mind when s/he thinks of your community foundation.

The response (which might range from “vital community leader” to “grantmaker” to “donor resource” to “nothing”) is a measure of your current brand. Your brand is the perception your organization holds in the minds of your target audiences. It may be exactly the perception you seek. Or not. The entire community foundation team is integral to the development of your brand perception. It happens in three ways, through:

- Your organization’s identity — name and logo
- Communicating your message — which represents a promise to your community
- Delivery of your services — which represents performance against your promise

Brand perceptions are triggered by your identity, informed by your messaging, and ultimately shaped by your performance.

<i>Brand elements</i>	<i>Audience response</i>
YOUR IDENTITY.	I recognize you.
YOUR MESSAGE.	I know what you promise.
YOUR PERFORMANCE.	I know what you deliver.

A word on roles

The marketer’s role is to manage the first two of these brand elements: identity and marketing. Every board and staff member is responsible for the third, and most critical element, of this three-part branding model: performance. Every interaction with a member of your community, every decision regarding your organization — virtually everything you do — affects brand perception. In this sense, everyone who is part of your community foundation is a “brand manager.”

Quick-start checklist

Consider these questions in assessing brand management across your communications portfolio.

- Is our identity consistently and appropriately applied to all communications?
- Do all communications use and reinforce our core messages?
- Is the visual appearance of all our communications integrated?

INSIGHT COMMUNITY FOUNDATIONS SERIES: THE FOUR P_s OF MARKETING

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