



## *Branding and positioning*

### Define and Promote the Value You Provide

You should never assume that people understand exactly what your organization does – its mission, purpose, constituency, people, programs, performance, plans, etc. In our consulting work, we see time and again that the public’s *perception* of an organization can lag years behind the reality, even among well-informed community leaders.

To most effectively present your organization to prospective donors, you must first understand how various constituents currently view the organization and what they value most about it. Many nonprofit leaders are now investing in a deliberate *branding process* to learn more about how their organization is perceived, and to best express its value-added proposition.

**Through branding, you can reinforce your organization’s identity and position in the marketplace.**

The current image of an organization strongly influences how people respond to it. The positive image of your organization in the donor marketplace can take a long time to establish, and just as long to change or erase unwanted perceptions.

In today’s competitive landscape, however, things can change rapidly, dramatically, and without warning. The

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## *The strategic assessment*

### Find Out What They *Really* Think Before You Plan!

What is the first step you should take to move your nonprofit organization to a higher level of performance and effectiveness, especially in fundraising and development? If your first thought is strategic planning, then you have a lot of company. Among the organizations we serve, many have embarked on some kind of strategic planning exercise this year.

However, if you want to maximize the productivity and impact of your strategic planning process, you should first conduct *thorough and objective research into your organization*. Through this process, you will learn how the institution is performing, and how its perceived, not only by those you consider part of your family, but also by those whose contact with the organization is less frequent and intense.

All of these constituents are current or potential stakeholders in your organization’s future success. They include those who benefit from the services your organization provides; those who support the organization financially; and even those who know something about the organization, but are involved only marginally or not yet at all.

**Research will clarify or redefine the current baseline assumptions that drive your planning decisions.**

Research into the experiences, perceptions, interests, and concerns of your organization’s constituents will provide a real-world database of facts and perceptions to clarify or redefine the baseline assumptions that drive your planning decisions. Without this timely information, your plan will lack credibility and provide diminished value.

Too often, we encounter organizations that wait until a capital fundraising campaign is imminent, and then rely on the campaign planning (feasibility) study to provide a reality check on the organization’s overall performance and position in the donor marketplace. The primary purpose of a campaign planning study, however, is to determine a winning strategy for the campaign: how much can be raised, and exactly *how* it can be raised.

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## What Exactly Is Branding?

Branding seeks to identify and express the *competency* that distinguishes your organization. The brand evokes the essence of what your organization *is*, what it *does*, and what it *stands for*. The intent is to create or reinforce, in the minds of your constituents, a powerful bond with the organization and/or program.

For a nonprofit organization, a brand proclaims, or at least suggests:

- Your identity (who you are)
- Your mission and purpose (why you exist)
- Your values (what you stand for)
- Your competency (what you do best, and how you add value to people's lives)
- Your vision (what you hope to achieve, and what kind of world you aspire to create)

## What are the benefits of a branding initiative?

1. Branding makes your organization more *visible* and *recognizable*.
2. Your brand communicates to your constituents a certain standard of *quality*, and it promotes *trust*, *confidence*, and *goodwill*.
3. For your institutional family of staff, volunteers, and donors, branding can build pride, loyalty, and a shared sense of purpose.

## Define and Promote the Value You Provide

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organization's revenues and even its visibility may be adversely affected. In such an environment, you don't have years to act or react! You must move swiftly and surely to reinforce your organization's brand and shift or strengthen its position.

To accomplish that, you must find out what your donor constituents and other stakeholders are thinking and feeling. How much do they know about your organization? What business do they think you're in? What do they think differentiates you from your competitors? To what extent do they trust you to deliver on your promises?

The perceptions, ideas, and information you gather will provide the basis for clarifying and better expressing your organization's mission and purpose; what value it contributes; what people expect from it; and what kind of world it aspires to create. All of these elements will affect how the organization presents itself, verbally, visually, and person to person.

### Building awareness and visibility

Verbally, a brand is expressed through a powerful and memorable *message* (or *messages*) that evokes what the organization is about. Graphically, it is expressed through a distinctive, attractive, and evocative *look* or style that reinforces and intensifies the verbal message.

**Your marketing plan should identify key constituencies and outline your objectives and strategy for each.**

With a vigorous and sustained effort to build and promote your brand, your organization will be able to create and maintain a *higher profile*, especially among those you want most to attract and influence (including donors and volunteers). For that purpose, you will want to work with the media and through your own channels of communication. To support these efforts, your organization will need:

1. A written *marketing plan* and *strategy* to identify key constituencies and define specific objectives, strategies and desired outcomes for each.
2. A coordinated, professionally produced, and attractive family of *marketing communications*.

When these tools are based on a well-conceived strategic plan and a compelling case for support, you're sure to improve the marketing, and ultimately the results, of all your development programs.



## Find Out What They *Really* Think Before You Plan!

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If your aim is to *advance the organization as a whole*, then why not do your research when you have more time, and the stakes aren't so high? Between campaigns, you can discuss the organization in a more relaxed setting without asking pointed and probing questions about major gifts, campaign leadership, etc.

In contrast to a planning or feasibility study, the approach we recommend is called a *strategic development assessment*. This multifaceted, in-depth exercise can cover more terrain, and provide greater insight and more information, than a traditional campaign planning study.

### **Components of the Strategic Assessment**

1. *A detailed analysis of the development function* (programs, personnel, procedures, etc.), based on a series of conversations with key personnel in the development office and related functions (planning, marketing, etc.).
2. *A self-evaluation of the board of trustees or foundation board* by its own membership. This exercise may prepare the ground for future board development activities.
3. *Conversations with other members of the institutional family* (employees, volunteers, physicians, etc.). These may take the form of personal interviews or focus groups.
4. *Conversations with other constituents or stakeholders* who can provide some insight into the organization and its environment. These constituents may range from major donors and community leaders to customers.
5. *Research into the best practices of peer organizations*. This process extends the inquiry to other organizations in your field who may be dealing with similar issues. (They may be more willing to help if you share the results of your research.)

The purpose of the assessment is not to get people to say what you expect them to say, or what you want to hear, but to find out what they really *think* and how they actually view your organization. This is best accomplished by trusted and experienced outside professionals with a unique objectivity and perspective. The results may be surprising and challenge the organization's understanding of its position in the community.

With the benefit of timely and honest information, you'll be in a stronger position to set a strategic direction for your organization that is firmly grounded in your current realities. A more effective plan is only one of the benefits: many of those who participate in the assessment and the planning process will have a keen interest in watching your plan unfold, and helping it to succeed.



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## *On Second Thought*

# Making the Case for Development

By David Goettler, CEO  
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To some of our colleagues, development professionals must seem like a very demanding bunch. We always want or need something: new software, more staff, more volunteers, or a more visible office space closer to the CEO. And we're always pushing our way onto the board agenda to present and discuss some urgent matter related to the organization's future.

As development professionals, we work hard to communicate with our constituents and to position our organizations in the most favorable light. How much time, however, do we spend communicating with our own colleagues about what we're doing, and why we're doing it?

**We may need to work harder to explain to our own colleagues exactly what it is that development brings to the table.**

The development function, for example, has the capacity to:

- Build authentic and lasting relationships with those who can advance the organization.
- Attract volunteers who can become advocates and greatly increase our productivity.
- Generate substantial revenues.
- Actively listen to the marketplace and recognize changes that affect the organization.
- Listen to those the organization serves, and witness firsthand its impact on the community.

If we can help our peers to comprehend the full value of what the development office has to offer, then our CEOs and board of directors are sure to get the message. And that just might make it easier for them to provide the kind of human and financial resources that will move the organization toward the achievement of its true potential!

