

# 2013

## **[CHANGING COMMUNICATIONS TO CREATE STRATEGIES FOR ORGANIZATIONAL SUSTAINABILITY]**

In an effort to implement fundraising goals to overcome budget cuts, the Alabama Folklife Association (AFA) decided that determining, expressing, and articulating our brand “value” in terms of services and products to meet needs and marketing the organization to new audiences for donations became challenging. Consultants in communications and design assisted in developing new ideas and messages to use in internal media that would enhance the implementation of annual development plans and help ensure organizational sustainability.

*“If a nonprofit organization wants to maximize its contributed income it needs a coherent, executable development plan, and that plan must have a viable communications strategy.”*

—Joyce Braun Poderis

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## PROJECT REPORT

### I. Project Report

#### Introduction

In October, 2010, long-time leader, author, folklorists, and musician, Joyce Cauthen, retired as Executive Director of the Alabama Folklife Association (AFA), a nonprofit partner program of the Alabama State Council on the Arts. During this time, the AFA underwent strategic planning and completed a SWOT analysis with numerous goals about the future and growth of the organization. After hiring the first full time Executive Director in October, 2010, the nonprofit learned in June, 2011 that budget reductions would result in total estimated losses in annual operation support of approximately 60%.

With a strong financial situation and the diversification of grant funding, the AFA has continued but not changed in its approach towards development or the planning perspective and climate set forth during 2010. Hiring the first full time director came with a mindset of organizational growth and expanding programs and services. Today, planning on the short term needs to shift towards overcoming budget cuts through funding diversification in order to ensure a sustainable future while still maintaining the long term vision and goals. In order to address new challenges, changes need to occur that will result in an overall organizational commitment to raising funds and cultivating old and new relationships.

With the grant awarded by the **American Folklore Society** under the Consultancy Program funded by the National Endowment for the Arts, the Alabama Folklife Association (AFA) seeks to develop a new image and messaging to be integrated into strategic plans that will be implemented to overcome existing challenges and **accomplish the following goals:**

1. Create a new brand that makes audiences feel ownership in the mission of the organization and develop strong, consistent messaging that focuses on services, tangible and measurable results, and highlights success stories.
2. Revise current communications to integrate new messages and create a new development communications strategy.
3. Create and implement a working development plan to be followed every year, and increase non-government grant income annually by \$20,000 that will provide operational support and matching cash for grant funded projects.
4. Ensure that implementation plans will be carried out by the entire organization including all staff members, representatives from partner organizations, and members of the AFA Board of Directors.

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**Summary:** To effectively utilize the communications and public relations programs of the organization to create a favorable and effective climate for giving to the organization.

### Consultants

**Red Sage Communications, Inc.** is located near Huntsville in Decatur, Alabama. They are a strategic communications company that provides results-oriented marketing and website development solutions to assist customers in achieving their organizational goals. They work with companies and organizations of all sizes across Alabama and throughout the Southeast, as well as with communities, economic development associations, and larger non-profit organizations. <http://www.redsageonline.com/>

We worked directly with the company President, Ellen Didier, who has an extensive amount of experience supporting and enhancing the efforts of nonprofit organizations, arts development in a downtown area, and local arts organizations. She has developed several strategic plans for nonprofits and contributed significantly to economic development organizations, a process that always involves community arts and design and the showcasing of local cultural resources.

**Kelton Design, LLC.** is an exhibit development and design firm operating out of Huntsville, Alabama. The firm has worked with the Alabama Folklife Association for over one year on a traveling exhibit, *ALABAMA in the MAKING: Traditional Arts of People and Place*. As a result, John Kelton, who has over 20 years of experience, knows the organization very well and spent many, many hours listening to folklife audio recordings and processing hundreds of photographs, also part of the folklife collections of the state. His new motto of “It is our job to make you look good. Let's get started” fit perfectly with the project. When we learned that we are running out of brochures, AFA decided that there was no time like the present to integrate that need with developing a form of communicating the AFA that is NEW and unique. <http://www.keltondesign.com/>

### Partners

The folklorists with the Alabama Center for Traditional Culture, a Division of the Alabama State Council on the Arts, and the staff at the Archive of Alabama Folk Culture at the Alabama Department of Archives and History contributed to the project during a conference call.

## PROJECT REPORT

### Process

The Alabama Folklife Association set forth a plan to implement the project and three members of the Board of Directors volunteered to serve on a committee. Changes were made along the way. Using various skills and abilities creative professionals contributed to various steps and provided the necessary products to complete the project.

In addition to messaging, Red Sage Communications, Inc. created the format and ideas for the development plan.

The final outcome presented in this report and the communications and development strategies map out methods to overcome multiple challenges and to establish the necessary infrastructure to create a sustainable future for the organization.

Alabama Folklife Association (AFA) worked with Ellen Didier, the President of Red Sage Communications to develop a proposal with new ideas, messages, and a rough draft of strategies.

1. Red Sage requested information from the AFA.
2. AFA provided information and had numerous emails, one phone call and an in-person meeting with Red Sage to conduct an overview and provide further details so that Red Sage could audit the communications, development activities, and overall structure and programs of the organization.
3. Red Sage did a very thorough investigation and analysis of AFA materials, web site, and all communications as well as plans, SWOT analysis, current funding challenges and changes, sources of revenue, partners, projects, and products.
4. Red Sage provided an extensive report to include the following:
  - Audit of current internal and external media
  - Audit of current income sources
  - Five part strategy with results measurement that included both communications and development
  - Eight pages of recommendations and suggestions for improved messaging, improving the web site, and capitalizing on social media

## PROJECT REPORT

The Executive Director of the Alabama Folklife Association (AFA) researched and outlined the steps and tools to complete the communication strategies.

AFA took all of the information, strategies, and ideas provided by Red Sage Communications, Inc. and organized into three products:

1. A Communications Strategy for Development Operations
2. A Communications Plan to Enhance Fundraising
3. An Annual Development Strategy

With all of these tools in place, AFA decided there still needed to be visual ideas to go with the new messaging to provide a guide for presenting the organization in a new way that could be carried out in print, social media, and the web site.

AFA contacted Kelton Design, Inc., an exhibit design firm currently working for the AFA, who is very familiar with the organization, in particular the value of the research and collections. He provided fresh ideas for presenting the organization and eliminating the struggle to find a tag line. Professional recommendations on tag lines encourage the use of action verbs and the AFA has too many actions.

Instead he provided ideas that display the ways that traditional artists tell stories through their creations. The proposed clauses to accompany the images identify the connection of the general public to the many traditions of our state and our heritage.

Ideas presented were discussed and evaluated during a conference call that included input from the institutional partners and members of the AFA Board of Directors. Suggestions were made on ways to revise the slogans to meet likes and dislikes while other comments focused on the design ideas. Final analysis and decision-making will be carried out by a new communications committee and presented to the AFA Board of Directors for final approval.

## Conclusion

While current challenges prompted this project of gaining insight and new ideas from consultants to breakthrough challenges facing the Alabama Folklife Association, organizations should consider addressing their communications using a review or audit format and inventing new ideas and strategies on a periodic basis. In addition, having organizational communications and annual plans directed towards grant funding sources is vital and important, but today's environment warrants efforts to make changes in order to capitalize on other sources of income.

## PROJECT REPORT

**Professional Standards** *\*all lists are taken directly from the web site mentioned.*

### Nonprofit

According to the Alabama Association of Nonprofits, plans for raising money by a nonprofit organization should follow a set of standards.

#### **Core Operating Standards for Fund Development:**

1. Understands sources of revenue for nonprofit agencies.
2. Has a preliminary plan to raise funds for the organization from a variety of sources.
3. Has a board that is willing and able to raise funds.
4. Has a preliminary plan to sustain the organization and build its future.

**The Utah Association of Nonprofits** presents on their web site many ethical standards including sections directed towards fundraising and relationships with donors. While AFA has a development plan completed in conjunction with this project, we were mainly concerned with the sections on communications.

### **Fundraising Communications**

#### Truthful Communications

1. An ethical nonprofit uses solicitation and promotional materials that
  - Are accurate and truthful
  - Identify the organization
  - Reflect its IRS status
  - Reflect its mission
  - State its intended use of solicited funds
2. Non-coercive tactics; An ethical nonprofit organization does not engage in solicitation tactics that are coercive, intimidating, or deceptive.
3. Non-exploitive publicity; An ethical nonprofit shall respect the integrity and privacy of its clients or patrons. Specifically, it does not use clients, their pictures or their case histories in any publicity or fundraising activities without prior written consent.

## PROJECT REPORT

### COMMUNICATIONS

#### Stakeholder Communication

- Ethical nonprofits are responsive to community needs and solicit input from a broad range of views and constituents in the process of planning priorities and activities.
- Ethical nonprofits provide information to the public that describes their decisions and processes, and their stakeholders have regular opportunities to interact with the board and management regarding its decisions and practices.
- Information is readily available to the public about a nonprofit's operations programs and program effectiveness, activities, and governance. Posted information is truthful, complete, and not misleading.
- An ethical nonprofit has a variety of ways to be reached by the general public and stakeholders. This includes website, phone, fax, social media, and a physical street address. This contact information is provided on the website of the nonprofit, and requests for information receive a prompt and complete response.
- The ethical nonprofit communicates quickly and accurately in times of crisis. It avoids deception and only communicates with information that is relevant to the issues at hand.

#### Marketing

Information on best practices in marketing and communications can come from a variety of professional organizations and sources including the Public Relations Society of America, the Council of Public Relations Firms, and the American Marketing Association. Some of the best information is found on web sites of businesses that provide services and these are presented as papers and can be downloaded. See the sources section (p.8) for links to web sites.

**The Association of Fundraising Professionals** created "The Donor Bill of Rights" to assist organizations in understanding fundraising responsibilities. When finalizing and implementing the plans established by this project, the volunteers and staff and partners should keep in mind the following:



**PROJECT REPORT**

**The Donor Bill of Rights**

Philanthropy is based on voluntary action for the common good. It is a tradition of giving and sharing that is primary to the quality of life. To ensure that philanthropy merits the respect and trust of the general public, and that donors and prospective donors can have full confidence in the nonprofit organizations and causes they are asked to support, we declare that all donors have these rights:

- I. To be informed of the organization's mission, of the way the organization intends to use donated resources, and of its capacity to use donations effectively for their intended purposes.
- II. To be informed of the identity of those serving on the organization's governing board, and to expect the board to exercise prudent judgment in its stewardship responsibilities.
- III. To have access to the organization's most recent financial statements.
- IV. To be assured their gifts will be used for the purposes for which they were given.
- V. To receive appropriate acknowledgement and recognition.
- VI. To be assured that information about their donation is handled with respect and with confidentiality to the extent provided by law.
- VII. To expect that all relationships with individuals representing organizations of interest to the donor will be professional in nature.
- VIII. To be informed whether those seeking donations are volunteers, employees of the organization or hired solicitors.
- IX. To have the opportunity for their names to be deleted from mailing lists that an organization may intend to share.
- X. To feel free to ask questions when making a donation and to receive prompt, truthful and forthright answers.

**PROJECT REPORT**

**Sources**

Alabama Association of Nonprofits. "Core Operating Standards"  
<http://www.alabamanonprofits.org/core-operating-standards.php>.

American Marketing Association.  
<http://www.marketingpower.com/layouts/Reference/Bestpractices.aspx>

Association of Fundraising Professionals.  
<http://www.afpnet.org/Ethics/content.cfm?ItemNumber=3093&navItemNumber=536>. Note: This web site has numerous sources of information including ethical standards for social media.

FrogDog Business. "The Value of a Strong Brand"  
[http://frog-dog.com/articles/detail/the\\_value\\_of\\_a\\_strong\\_brand/](http://frog-dog.com/articles/detail/the_value_of_a_strong_brand/).  
Note: This is the final article in a series of articles on brand strategy from FrogDog.

Poderis, Tony, et. All. All of the following articles came from the web site by Tony Poderis. <http://www.raise-funds.com/>.

"Developing a Communications Strategy For the Development Operation"  
by Joyce Braun Poderis.

"Designing a Communications Plan to Enhance Your Fund-Raising Campaign"  
by Tony Poderis

"It's a Brave New Digital World But Will This Strengthen Relationship?"  
by David Patterson

Sumac Non-Profit Software. "Writing a Case for Support"  
<http://sumac.com/writing-a-case-for-support>

Sumac Non-Profit Software, "Mastering Social Media" section of the library.  
<http://sumac.com/library>.

Utah Association of Nonprofits. "Standards of Ethics"  
<https://utahnonprofits.org/membership/standards-of-ethics?highlight=Wyjfb21tdW5pY2F0aW9ucyJd>.

## COMMUNICATIONS CONTEXT

### II. Communications Strategic Plan for Operational Development

#### Current Challenges:

- Dependent on arts based government or humanities grants: 90% of income.
- Significant decrease in government grants including amounts and quantity per year resulting in a need for funding diversification.
- Increased competition from other organizations and institutions also in the process of funding diversification.
- Private, family, and corporate foundations are more inclined to give to local programs that meet the needs of their communities or a defined geographic area and Alabama Folklife Association is statewide with no centralized headquarters tied to a specific community or region.
- Competition from agencies and organizations raising funds for projects or programs that also use the term “folk” as popularized, but have missions and activities unrelated to the purposes and services of folklife programs.
- Due to government grants, the Alabama Folklife Association is a 30 year old 501C3 organization that has never had to develop the standard nonprofit case for support with the exception of a special fund created to honor a person. Annual development plans and been structured from grant to grant to grant.
- Changing the development process to include participation from the entire organization including the full staff, AFA Board of Directors, partners, and constituencies.

The AFA is providing an outline of strategies and plans in case other organizations or institutions can use the same steps and tools to assist make changes. Plans will involve more people in an effort to establish a climate for fundraising and funding diversification and require the establishment of new committees. All tasks listed are assigned to staff, partners, and new committees and given deadlines. Like any implementation plans, they should translate into workplans to be visited frequently to make sure everyone is on task.

## COMMUNICATIONS CONTEXT

*"Committees are, by nature, timid. They are based on the premise of safety in numbers; content to survive inconspicuously, rather than take risks and move independently ahead. Without independence, without the freedom for new ideas to be tried, to fail, and to ultimately succeed, the world will not move ahead, but rather live in fear of it's own potential."* – Ferry Porsche

Audit current communications and review to assess strengths and weaknesses.

1. Make a list of target audiences and stakeholders
2. List current internal media
  - E-newsletter and distribution frequency
  - Main organizational website
  - Printed brochures and membership forms
  - Annual journal or publications
  - Internal media connected to specific programs such as exhibit materials
  - Additional web site and facebook pages
  - Additional websites for grant funded projects
3. Measure Activities of current social media
  - Facebook group page
    - Number of members – growth rate
    - Engagement
    - Posting statistics per day or week
  - Twitter
    - Number of followers
    - Number and frequency of tweets and engagement

### **E-Newsletter Metrics:**

- Number of subscribers
- Open rates

### **Organized Training Events**

- Number and frequency
- Attendance

### **Organized Non-Training Events**

- Annual meetings or special collaborations

## COMMUNICATIONS CONTEXT

### Current Exposure at Events across the state

- Number of major festivals attended annually as a nonprofit booth/vendor

### Current Speaking Engagements

- Number per year

### External Media

#### Television

- Number of shows or participation in a show as an interviewee

#### Radio

- Number of radio advertising spots
- Number of radio programs
- Frequency of recording collections aired on radio shows

#### Printed Newspapers

- Number of printed advertisements or articles in newspapers and flyers
- Exhibits: number of feature stories in local newspapers and in the newsletters and social media of host institutions.
- Numbers of programs, printed articles, and presentations featuring scholars doing research in the state and funded by the organization.

#### Other

- Number of podcast interviews
- Number of press releases presented per year

## BRANDING AND MESSAGES

### **Strategy: Strengthen Image and Messaging in communications.**

*Brands are the stories that unite us all in a common purpose within an enterprise, and connect us with the people we serve on the outside. These brand stories give meaning to who we are and what we do." – Mark Thomson*

*Organizations that haven't updated their branding and marketing strategies stop reaching younger demographics, meaning that their donor bases will eventually age out. Also, .....potential and past donors may begin to ignore what seems like outdated causes just because the look and feel of the organizations are outdated.*

-FrogDog business web site.

**Objective 1:** Create a new slogan and image that is short and quickly establishes a connection between audiences and the mission of the organization.

**Task 1:** Develop new ideas and visionary representation that provides a brief clear message about the organization and its programs and services.

**Task 2:** Integrate new image and slogan into internal media while developing new printed materials and web site.

*"Any development communications strategy must also be true to the organization's mission. No one should ever construct a development plan or the communications strategy to support it without reviewing the organization's mission statement." -Joyce Braun Poderis*

**Objective 2:** Make messages about purpose and services that fulfill the mission more clear and consistent in order to better demonstrate the value of the organization.

**Task 1:** Review Mission Statement to make sure it continues to accurately reflect the programs, projects, and services that have measurable results.

**Task 2:** Develop new messages consistent with the mission and insert into new or existing internal communications.

**Note:** To meet diverse media, there will be several slightly modified versions of the mission statement, but each should summarize why the organization exists. Have one for social media, one for brochures and printed materials, and other versions for web site and fundraising campaigns, but **make sure the message is consistent.** Expanded versions will include a mission followed up by additional statements about how the organization carries out and completes the mission.

## BRANDING AND MESSAGES

**Objective 3:** Start building a case for support to present for internal communications in order to establish and present a broader awareness of the need.

**Task 1:** Add information on why people should support the organization and how they can help: the first step in building a Case for Support.

**Task 2:** Highlight success stories and provide measurable results of these projects or programs.

**Objective 4:** Maintain the positives of the current web site, but make navigation, organization, and messaging as consistent as possible in order to draw interest and support from a broader audience.

**Task:** Create a new web site with an improved navigation scheme and presentation and incorporate new brand, new messaging, etc. Use the web site to present the case for support to include mission, success stories, programs, research, education, and promotions.

**Objective 5:** Make better use of social media to showcase research and archival collections, drive people to the web sites, increase membership, and/or to purchase.

- **Task 1:** Expand social media efforts to include YouTube. Post videos and provide links to the website and other social media.
- **Task 2:** Expand social media efforts to include other platforms. Create posts that will promote archival resources as they become available for research or other activities to engage audiences.
- **Task 3:** Develop social media campaigns geared at increasing engagement and participation from the public. Take advantage of “apps” to enhance active participation.
- **Task 4:** Post “blurbs” and links to features stories about folklife that have links to essays or liner notes or other sources of information provided through the organizational web sites.

**COMMUNICATIONS FOR FUNDRAISING**

**III. Communications Plan to Enhance Annual Fundraising**

**Tool 1:** Organize recipients of messages into groups consistent with new branding and recommended outline of “what we do.”

**Tool 2:** Develop a “Case for Support” to use in drives and campaigns.

*The Case for Support is the statement of your cause explaining what your nonprofit does, why it's important and, most importantly, why people should support you. This statement serves to inform all communication pertinent to raising funds. It appears in applications for grants, appeals for support, on your website, and wherever you need to explain why a potential donor should support your organization. –Sumac Nonprofit Software*

**Task 1:** *The What;* Determine financial needs for the year and organize into a list with amounts, but keep simple and straightforward.

**Task 2:** *The Why;* Write up summary and messaging for recipients using new messages and speaking points that clarify why audiences should support the organization and where the money will be going.

**Tool 3:** Schedule, design, and plan the annual campaign into annual plans, programs, and activities.

**Task 1:** *The When;* Establish a date to implement the annual fundraising campaign.

**Task 2:** *The How;* Determine how donors will contribute that is consistent with the “How You Can Help” messaging recommended earlier and now provided on the web site and potentially other locations or fundraising platforms.

**Tool 4:** Develop a list of general speaking points for staff, partners, and members of the Board of Directors

**Task 1:** Review brand and messaging and highlight areas to include in speaking points.

**Tool 5:** Create and implement a plan for publicizing the campaign.



**FUNDRAISING CONTEXT**

**IV. Working Development Strategy with implementation plan**

**Fundraising Context:** Review and highlight opportunities to increase non-government grant income and set measurable goals and objectives. Assign duties and responsibilities as well as deadlines to committees made of volunteers and partners plus organizational staff.

**Membership program:**

- Current number of people in the database
- Current membership annual revenue \$\_\_\_\_\_.

**Bookstore program and revenue:**

- Current bookstore revenue: approximately \$\_\_\_\_\_
- Limitations in audience due to limited product range
- No products featuring the AFA (logo)

**General Non-grant Donations:**

- Office supplies and in-kind office and meeting space

**Corporate Giving:**

- Current income: \$\_\_\_\_\_ per year

**Other Funds raised for special programs:**

- Over \$\_\_\_\_\_ raised from private donations
- Publicity generated and process for requesting outlined

**Previous Event Profit:**

- Events, nature, format and \$\_\_\_\_\_ for AFA and \$\_\_\_\_\_ if applicable.

**Previous Campaigns:** \_\_\_\_\_\$ raised, format, and evaluate how it was carried out and communicated.

**Grant Source Diversification:** *non-government*

## WORKING DEVELOPMENT PLAN

### STRATEGY 1: Increase Membership

**Objective:** Use the list of audiences identified to refine membership levels and ensure there is a level or category for ALL in the membership program.

- **Task 1:** Audit existing membership levels and compare to other state organizations.
- **Task 2:** Define list of membership benefits for different levels, expanding current benefits as needed and create new messages to clearly explain benefits.
- **Task 3:** Collaborate to create a new creative program establishing a benefit of organizational members that also other organizations, institutions, businesses, or artists.
- **Task 4:** Develop and implement plan for marketing and requesting memberships across all materials, at all events, and at all presentations and on internal media during annual campaign.
- **Task 5:** Develop plan and processes to make annual request or invoice for membership renewals in association with the annual campaign.

#### **Results Measurement:**

- Total number of members (statistics broken down by category)
- Total membership revenue annually

**STRATEGY 2:** Hold an annual meeting that is income producing event rather than a free service and use it to raise awareness of the organization. Celebrate efforts and successes across the state.

- **Task 1:** Determine structure of event, where it would be held, and when it would be scheduled and investigate potential collaborations.
- **Task 2:** Develop sponsorship levels and registration fee to cover the cost of the event.
- **Task 3:** Develop plan for local volunteer or partner assistance to plan and conduct the event.
- **Task 4:** Develop plan to market the event to members and non-members.

**WORKING DEVELOPMENT PLAN**

**Results Measurement:**

- Revenue
- Annual attendance

**STRATEGY 3:** Develop an annual outreach program or competition to raise awareness of the organization, celebrate folklife, and engage a diverse group of people from across the state.

- **Task 1:** Define list of potential programs, etc.
- **Task 2:** Develop self-sustaining or income producing budget
- **Task 3:** Develop plan for implementation
- **Task 4:** Assign duties and responsibilities to Board members, staff, and other volunteers
- **Task 5:** Develop plan to market program and participation

**Results Measurement:**

- Revenue from participation fees
- Number of participants

**STRATEGY 4: Increase Product Sales Revenue**

**Objective:** Expand products offered for sale

- **Task 1:** Develop list of potential new products that can be sold through the website or at events and create three new each year.
- **Task 2:** Announce new products in communications and showcase at events.
- **Task 4:** Establish case display of products at other locations.

**Results Measurement:**

- Annual sales revenue
- Number of purchases per product