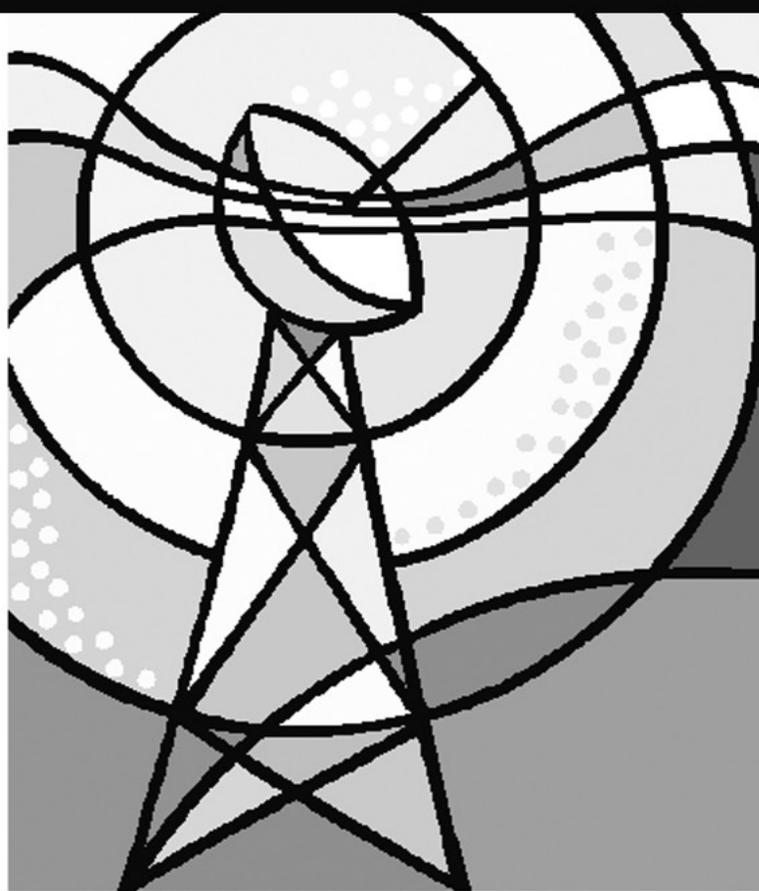


# MARKETING

## for the Recruitment of Mentors



a workbook for finding and attracting volunteers



Office of Juvenile Justice  
and Delinquency Prevention

# **Marketing for the Recruitment of Mentors:**

A Workbook for Finding  
and Attracting Volunteers

by Linda Ballasy

November 2004



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# OVERVIEW

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## Introduction

The commitment to become a mentor isn't one that is made lightly. Mentors are asked to make a significant donation of their time and energy, undergo considerable scrutiny, and then work directly with young people who may have a number of challenges and difficulties in their life. As such, finding enough suitable and committed mentors for the numbers of youth your program wishes to serve can be an ongoing challenge. Mentoring program staff, board members, and other committed individuals must often spend considerable time and effort finding, attracting, and enlisting prospective mentors.

Stating the obvious, mentoring programs can't operate without mentors; by definition, they are an essential and non-negotiable element of all programs. Yet, at some point, almost every youth mentoring program faces the challenge of not having enough mentors. This problem is usually most acute at start-up. And, as programs grow, it is also quite common for them to have long waiting lists of youth hoping to be matched with mentors. This can be especially true for male, older, and minority youth, as well as other targeted demographics that may be part of a particular program's design and objectives. A limited staff can exacerbate the challenges of effective recruitment, as their time gets divided between recruitment and the full array of other functions that are necessary to develop and sustain a successful mentoring program.

Recently, the competition for mentors has increased as new mentoring programs continue to sprout up in growing numbers in nearly every community across the nation. Public awareness of mentoring as a successful intervention for youth continues to increase, suggesting its growth will continue into the foreseeable future. It is also important to consider the greater context of a large and expanding nonprofit sector with an array of organizations that vie for the time and energy of volunteers. Volunteer recruitment has become a well-developed profession and many larger nonprofit organizations have trained, paid staff members dedicated to this endeavor. Adding to the difficulty is the fact that the requirement to become a mentor is a relatively time-consuming (typically four-to-10 hours per month) and a longer-term commitment (typically one year) than many types of volunteer work.

Mentors are where *you* find them. There is no one "right" method that works for all programs. The call is for mentoring program managers to become increasingly creative and resourceful in their recruitment efforts. This generally means being methodical and persistent in your efforts. As a start, clarifying the following for your program is well worth the time and effort:

- ◆ What types of individuals would make good mentors for the program?
- ◆ Where are the best places to find these types of prospects?
- ◆ What motivates individuals to volunteer and, specifically, to become a mentor?
- ◆ What are good ways to communicate with, and recruit, mentors?

Volumes have been written on volunteer recruitment, and even more written about marketing, including a growing number of publications focused on marketing for the nonprofit sector. This workbook joins the concepts of volunteer recruitment with the effective principles and practices of marketing, and applies them specifically to the *recruitment of mentors*.

People do not always associate a for-profit concept like marketing with nonprofit programs and organizations. However, the premise of this book is that there is no other area of activity in managing a mentoring program that requires as much use of the basic and systematic principles of marketing as does the activity called “mentor recruitment.” As you read through this workbook, you will see that anyone who has actively recruited volunteer mentors has also undoubtedly used some aspect of marketing principles and practices. The following table draws comparison between universal marketing terminology and the language of mentor recruitment.

### Comparison of Mentor Recruitment and Marketing Concepts

Marketing Concept	Mentor Recruitment Activity
Marketing planning	Recruitment planning
Goals and objectives	Target number and types of mentors
Environmental analysis	Evaluating local political, economic, competitive surroundings
Customers	Prospective mentors/volunteers
Target audience	Customer group: age, gender, ethnicity, profession, lifestyle
Marketing mix	Brochures, flyers, press releases, PSAs, events
Advertising campaign	Program slogan and core messages
Brand	Program image and reputation
Reach and frequency	Ongoing communication efforts
Relationship marketing	Building personal relationships and community connections
Sales analysis	Evaluating recruitment and promotional activities

As you can see, marketing, like most disciplines, has its own “language.” Many of these common marketing concepts are covered in more depth in the following chapters. However, an overriding goal of this workbook is to distill marketing into straightforward concepts, principles, and language that can be effectively applied to the task of mentor recruitment. Our hope is to share the principles and practices of marketing without the need for you to master the jargon, review textbook theory, or write a marketing thesis. The underlying concepts and processes are important to understand and remember, not so much what you ultimately call them.

Undertaking successful marketing efforts will keep your organization alive, strong, and vital for the long term. *Marketing for the Recruitment of Mentors* attempts to show that successful marketing is a matter of following sound, proven processes. This workbook can help you pinpoint specific areas of difficulty and improve your program’s effectiveness in recruiting volunteers. Ultimately, you can extend these marketing concepts and processes to other program objectives such as building community awareness and developing sustainable levels of funding for your program. The principles of marketing are universal, and whatever your program’s objectives, structure, size, or stage of development, this workbook is intended to be as versatile as your program needs.

## Using This Workbook

*“When improving the quality of life of individuals is at the core of an organization, rather than the manufacturing of products, the type of marketing activity that organization engages in is called social marketing.”*

—Philip Kotler

*Marketing for the Recruitment of Mentors* is intended as an instruction guide for anyone who is interested in learning a spectrum of marketing practices and principles, wants to delve into specific marketing issues, or desires to expand their learning by utilizing the additional resources listed at the end of Parts I and II. Intended for any type of mentoring program (from start-up to seasoned, from small to large) the numerous topics covered here will prove useful to a wide range of mentoring program staff members and levels of expertise:

- ◆ Mentoring program managers/coordinators
- ◆ Volunteer managers
- ◆ Staff members who are new to mentoring
- ◆ Staff members who are new to marketing
- ◆ Seasoned program managers and directors
- ◆ Those with marketing experience

## Uses and Benefits of Marketing

You may ask what marketing has to do with social services, nonprofit operations, and specifically mentoring. Once the nearly exclusive domain of the private for-profit sector, marketing has become entrenched within the daily scope of nonprofit activities. Many nonprofit organizations have become savvy marketers. In the nonprofit sector marketing takes on a different flavor and is called *social marketing*.

According to Philip Kotler, one of the world’s leading strategic marketers, “social marketing is the design, implementation, and control of programs seeking to increase the acceptability of a social idea, cause, or practice in a target group(s). It utilizes market segmentation, consumer research, concept development, communications, facilitation, incentives and the exchange theory to maximize target group response” (Kotler, 1975). Stated more simply:

### **K E Y   C O N C E P T :**

**“Social marketing” is used to improve the lives of a target group of individuals in some specific way.**

Successful marketing means more than simply developing an effective brochure or writing a decent press release for your local news media. It also involves thoughtful analysis as you go deeper in understanding your program, clients, volunteers, and the environment you operate within. Using this workbook offers a number of benefits to your organization and program, including:

- ◆ Rallying “the troops” and getting others on board
- ◆ Developing a mission statement
- ◆ Clarifying program goals and objectives
- ◆ Creating a focused, strategic plan of action
- ◆ Undertaking creative problem solving and brainstorming
- ◆ Defining and understanding a target audience
- ◆ Becoming more persistent
- ◆ Conducting a market and/or competitive analysis
- ◆ Better project planning and implementation
- ◆ Establishing new processes for organizational effectiveness
- ◆ Developing persuasive communications
- ◆ Developing effective media strategies
- ◆ Building community and media relations
- ◆ Instilling a customer-service focus

### **How This Workbook Is Organized**

Following the Overview section, this workbook is divided into two major parts—Marketing Planning and Marketing Communications. Together, these two topics provide a full course of marketing tools, processes, and practices. The Appendices provide additional details and numerous worksheets to aid you in applying the marketing concepts and processes illustrated throughout this guide.

#### OVERVIEW

This section provides a roadmap for how to use this book, as well as several foundational concepts that are critical across all marketing efforts. Both a practical definition of marketing and framework for conceptualizing marketing activities are provided.

#### PART I. MARKETING PLANNING

Developing a solid plan is fundamental to all marketing efforts. Part I clarifies how to set your mission and objectives (including pre- and post-planning essentials) and create a plan that can lead you to your goals. In this single section you will learn the basics of marketing planning by utilizing a number of simple worksheets that

allow you to transfer the concepts to your own program. A simple format allows you to draft a basic marketing plan in a few pages, or to add more detail and dig as deep into the process as you wish.

## PART II. MARKETING COMMUNICATIONS

The final section of this workbook discusses the realm of marketing communications in two chapters: “Creating Recruitment Messages That Appeal” and “Delivering Your Recruitment Message.” Nearly all marketing plans involve communicating to a specific target audience of people that you want, and need, to help achieve your program’s mission and objectives. Part II explores a basic process for the development of effective communication messages and, in addition, discusses effective and efficient methods of delivering these messages to your target audience.

## APPENDICES

The Appendices of this workbook provide practical, hands-on worksheets to assist you in developing an effective marketing plan and creating powerful marketing communications. This array of worksheets takes you through step-by-step processes, including such components as developing mission and positioning statements, determining and evaluating potential target audiences, and projecting your overall marketing budget.

## Marketing Defined

So what exactly do we mean by the term “marketing?” This single, seemingly simple, term conjures up many, often disparate, definitions, feelings, thoughts, and ideas. Endless definitions of marketing could be presented that vary by industry, purpose, author, and publication. There are also many varieties of marketing, such as product marketing, services marketing, relationship marketing, and now, social marketing.

Still, for a variety of reasons, marketing remains a widely misunderstood, underutilized, and daunting concept to many nonprofit organizations. For the purposes of this publication, marketing is simply defined as a process and set of tools used to *get things done*—either to achieve a goal, solve a problem, or take advantage of an opportunity.

### **K E Y   C O N C E P T :**

**Marketing is a process and set of tools used to get things done—either to achieve a goal, solve a problem, or take advantage of an opportunity.**

While this definition helps to conceptualize the end result of what marketing can do, it is also useful to see *how* marketing works. Thus, it is important to understand marketing as an “exchange process.” This provides an important context for marketing which can be helpful before delving into the “nuts and bolts” of *doing* marketing and recruitment for your program.

### **An Exchange Process**

A more traditional description of marketing than the one above is that of “satisfying needs and wants through an exchange process.” The premise is to think of the marketing “exchange” as being two-way. An individual or organization gets something it desires in exchange for something else that is desired by other individuals or organizations.

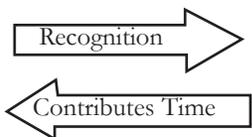
This “exchange” process becomes easy to visualize when you think of a for-profit product such as a box of cereal. In this case, a person buys a box of cereal in exchange for money. There may be a number of factors that influence the selection of a particular brand and type of cereal, and another set of factors that influence its price. At a core level, for example, people must eat, most people eat breakfast, and cereal is a common breakfast food. Beyond that, however, there are a number of other factors why a person picks a certain product including perceived quality, taste, ingredients, nutrition, brand image, competitive selection, offers on the box, and price. The manufacturer, on the other hand, sets a price based on factors such as consumer demand, competitive pricing, and the costs of making the product, advertising and promoting it, and getting it to market.

Thinking through the exchange process involved in recruiting mentors becomes important when developing a marketing plan and communication messages. You can start by asking why mentors want to get involved and what they expect to get from the exchange. Generally, no money is exchanged and it may appear they are giving a lot more than they are getting. Although the reasons to volunteer and make a commitment to become a mentor are much less tangible, they are no less real. Common reasons for becoming a mentor are listed below, and as you may note, all represent emotional or social benefits:

- ◆ Sense of joy from giving
- ◆ Passion to help youth
- ◆ Desire to “give back” to community in some meaningful way
- ◆ Fulfill a sense of social responsibility
- ◆ Wish to be recognized in the community, by family, peers, or employers
- ◆ Enjoy spending time with kids
- ◆ Inspired to mentor because of benefits received from being mentored
- ◆ Seeing and experiencing the “results” of mentoring

Additionally, a prospective volunteer may be looking for specific program attributes that will fulfill his need to volunteer—whether they apply to your program, a different mentoring program in your community, or an entirely different type of community service program altogether. Some of these attributes may include volunteer time required, duration of service, type of youth being served, agency affiliations, location, compatibility with program values, and impressions of the program staff and the overall agency.

The following table illustrates an example of an exchange process between a mentor and a mentoring program. In this case, the mentoring program provides community recognition and a sense of “giving back” to its volunteers. In exchange, the volunteer contributes time, which allows the mentoring program to achieve its goals in serving its client youth. This is a rather simplistic example, as a volunteer may derive more than one benefit from being a mentor, and the program may receive more than just the contribution of time.

Youth Mentoring Program	Exchange Process	Volunteer Mentor
Provides opportunity to donate meaningful service to community		Sees value in mentoring and need for working with youth

## Critical Elements of Successful Marketing

*“Whether you think that you can, or that you can’t, you are usually right.”*

—Henry Ford

Few organizational efforts are as far-reaching, or have the potential to bring significant positive results, as does the set of activities called marketing. Marketing involves both evaluative analysis and creative thought. It involves thorough planning and, at other times, constant action; in-depth analysis along with seemingly limitless creativity; and long-range strategic thinking combined with attention to immediate details. Moreover, it is work that is ongoing and rarely finished. In a nutshell, while it can be complicated, marketing also offers vast potential and has few limits as to what it can achieve for your program.

This section discusses some important foundational concepts that are both critical aspects of all successful marketing yet are also common *barriers* to the effective recruitment of mentors. While subsequent pages of this workbook will give you the more pragmatic skill sets, approaches, and processes of marketing, this section will help you understand that marketing is also very much a way of thinking, at times even an attitude. You might even think of the following concepts as providing important *prerequisites* to actually beginning your marketing work.

### Persistence Pays

The quality of being persistent is imperative to successful marketing and the recruitment of mentors. While it is not the *only* important quality, this one characteristic can make or break the success of your entire effort. Being persistent is applicable to mentor recruitment in numerous situations, but especially when approaching groups, organizations, and businesses. Often, groups and organizations may need to be approached from several directions over time until you find a “champion” who can help from the inside or a window of time that works better for them. This means not taking “no” for an answer, at least the first (and maybe second or third) time around.

### **K E Y   C O N C E P T :**

**Persistence involves the desire to achieve a goal or solve a problem despite obstacles impeding your success. It involves the willingness to evaluate and apply a different approach or solution to the situation until you attain the results you want.**

*Persistence* is a set of behaviors for approaching problems in order to achieve a goal.

As put in one marketing textbook:

Efficacious people stick to a task until it is completed. They don't give up easily. They are able to analyze a problem, and they develop a system, structure, or strategy to attack it. They have a repertoire of alternative strategies for problem solving, and they employ a whole range of these strategies. They collect evidence to indicate their problem-solving strategy is working, and if one strategy doesn't work, they know how to back up and try another. They recognize when a theory or idea must be rejected and another employed.... (Costa & Kallick, 2000).

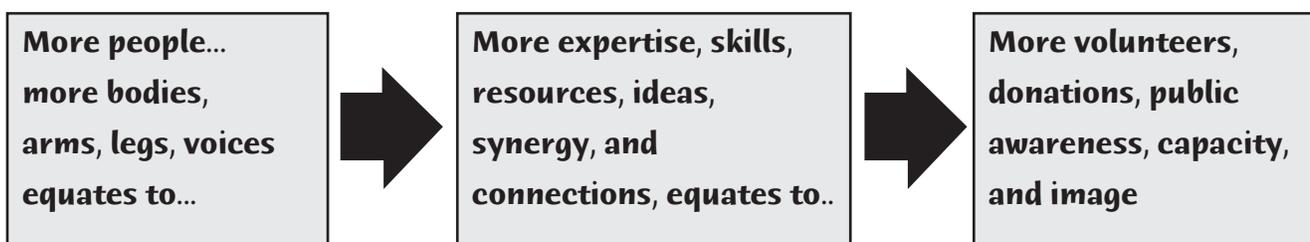
Additionally, persistence and optimism are strongly interwoven. Optimism fuels persistence. Feeling optimistic encourages you to be persistent in continuing to find a successful solution. Attempting to keep both of these in mind will give you a leg up in your mentor recruitment activities or any marketing effort.

### **Involve Others: More Is Better**

A common challenge for all programs is having one or a few staff members trying to do *everything* required to run a mentoring program. It often seems that time spent doing any one task well comes at the expense of another. Recruitment is a significant and never-ending activity; doing this one task well is not optional for the success of your program.

Thus, getting help is essential! Getting appropriate help with marketing activities can be one of the most effective and efficient strategies in managing your program, freeing up valuable time for the many other tasks you must perform in keeping your program up and running. Not only can it make your life a bit easier, it can also lead to improved outcomes for your marketing:

### **K E Y   C O N C E P T :**



Your program likely has access to at least a few natural groups of people that can help you with recruitment. The following table summarizes some of these groups that you might tap into as you build your circle of help. When asking others for help, be sure to give them specific ideas on how to recruit prospective mentors as well as provide them with any tools (scripts, brochures, presentations, etc.) they will need to be successful.

## Groups To Tap Into for Help

Groups	How They Can Help
Mentors (current and prospective), other volunteers	<ul style="list-style-type: none"> <li>• Current mentors are often the single greatest source of new mentors because they are committed, are walking testimonials, and have like-minded friends, acquaintances, and family members</li> <li>• Many prospective mentors drop out before being matched; ask them to help out in other ways</li> </ul>
Board of directors	<ul style="list-style-type: none"> <li>• If you don't have access to a board of directors, create an advisory board for your program</li> </ul>
Advisory board Organization staff	<ul style="list-style-type: none"> <li>• Have them set recruitment goals and help devise a recruitment plan</li> <li>• Give positive updates and keep your program fresh in the minds of other organization/agency staff members</li> <li>• Ask your organization's management to help publicize your program</li> <li>• Network with other staff about your program, what it does, how it works, its benefits, and what issues you are facing</li> </ul>

## Creative Problem Solving

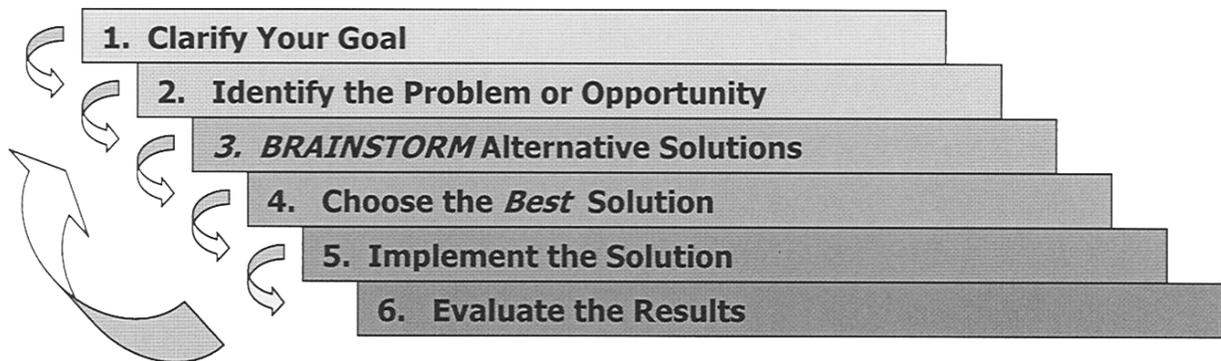
*“I have not failed. I’ve just found 10,000 ways that won’t work.”*  
—Thomas Alva Edison

In marketing there isn't any one “right” or single “best” answer to a given problem or objective. Some ideas and answers may be better than others, but even then, success or failure is affected by the nature of what the organization does, its local environment, how well an idea is planned out and implemented, and even the personalities and level of enthusiasm of those managing the details. And, we live in a world of constant change where what seems like a perfect idea today may not be such a great idea tomorrow.

Many people become mentally blocked when the word “creativity” is mentioned, immediately thinking they don't know how to be creative or feeling excessive pressure to come up with “good” ideas. Following a clearly laid out and logical, creative problem-solving process will help alleviate these challenges. To be most effective you need to involve other people in this process including program staff, board members, and other stakeholders—especially in the brainstorming stage.

The diagram below illustrates a step-by-step approach to creative problem solving. While many creative thinking or problem-solving models exist, this generic process provides a good starting point for developing sound marketing strategies. Appendix A provides a detailed description of the creative problem-solving process. After completing these steps a few times, you'll begin to see how the process can facilitate the generation of new and creative ideas.

### Problem-Solving Process



Developing marketing solutions from a creative problem-solving approach includes regularly evaluating your efforts and going through the steps again as needed. It is not uncommon to experience flaws at any point, the first few times through the process. Creative problem solving is an iterative process of improving upon what works, and moving away from ideas that don't work so well and then going on to create new ideas, improving upon work already done in the past.

### Being “Customer” Focused

*“Do, or do not. There is no ‘try.’”  
—Yoda (*The Empire Strikes Back*)*

Mentors are important customers for all mentoring programs. The quote above isn't about persistent doing or the unwillingness to fail. It is included here simply to imply that it is imperative and non-negotiable for you to provide excellent customer service to your mentors. This applies not just to your current or prospective mentors, but also past mentors as well as those that were not accepted by your program. Where customer service intersects with marketing...

## **K E Y   C O N C E P T :**

**...Everyone in your organization is responsible for marketing.**

Recruiting mentors is a bit of a two-edged sword when looked at from a customer service perspective. On one hand, they are your valued customers. On the other, you must scrutinize, screen, and evaluate their appropriateness and viability to become a mentor in your program. You must juggle both roles. Being friendly and courteous at all times is a must. Being clear with prospective mentors early in the process about the depth of the screening process, including any parts that may get personal, the length of time it will take before they can be matched, how they will be told if they are accepted and, if accepted, how they will be matched, is a good place to start building trust and positive relationships with your mentors.

So what can you do to evaluate and maximize your customer service efforts? One place to start is by examining your prospective mentors' points of entry into your organization, with the idea that first impressions are often lasting ones. For example, if someone less familiar with your program greets (or is the first to talk to) your prospective mentors, do they know the basics of your program, what is involved in participating, and the details of your volunteer intake protocol? If not, they may need some training if they are to deliver good customer service.

Another good idea is to conduct some type of customer service audit. This means finding out what your customers really think and what their experience with your organization was really like. Were they served well? Did they enjoy their experience with your organization, whether in person, over the phone, on the Web, or via e-mail? Or, were they treated indifferently, becoming so frustrated they just went away (or worse yet, left with a horror story to tell their friends, colleagues, and family)? These data could provide important information for how your prospective mentors perceive your organization, and where you need to make improvements.

You may serve your community diligently and provide the highest-quality services to youth, but if someone feels they weren't treated well by you or the staff of your organization, it will reflect on your mentoring program and overall organization. People talk to each other. Word spreads, whether good or bad. You never know who someone knows or if that unknown someone *might* have been your next mentor, donor, media interviewer, or the member of an organization you've targeted as a possible funding source.

# **PART I: MARKETING PLANNING**

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*All good marketing starts with developing a plan. Part I covers the core principles of how to develop an effective marketing plan for the recruitment of mentors.*

## **Chapter and Sections in Part I:**

### Chapter 1: Building an Effective Marketing Plan

- ◆ Pre-Planning
- ◆ Environmental Analysis
- ◆ Marketing Plan Components
- ◆ Post-Planning
- ◆ Sample Marketing Plan

## **This Part:**

- ◆ Breaks down marketing planning into several key stages including pre-planning, planning, and post-planning activities
- ◆ Emphasizes that managing the process of planning is crucial to its success
- ◆ Introduces a versatile tool for managing marketing planning and plan implementation
- ◆ Illustrates how to conduct a SWOT analysis or common type of environmental analysis
- ◆ Details what key components to include in your marketing plan
- ◆ Discusses important considerations for implementing the strategies of your plan
- ◆ Explains the “4 Ps” of marketing: product, place, price, promotion
- ◆ Introduces project management as a means for enhancing effectiveness
- ◆ Encourages doing ongoing evaluation of your plan’s effectiveness and making any needed adjustments throughout the plan year
- ◆ Provides a simplified example of a marketing plan that includes the key elements described in this part

## **Activities You Will Do:**

- ◆ Determine your planning team
- ◆ Develop a project schedule for building your marketing plan
- ◆ Conduct a SWOT Analysis

- ◆ Write a mission statement for your program
- ◆ Determine your mentor recruitment goals
- ◆ Define your target audience for mentor recruitment
- ◆ Create a positioning statement
- ◆ Develop marketing plan strategies and tactics
- ◆ Build a marketing plan timeline
- ◆ Draft a marketing plan budget summary
- ◆ Develop a tracking form to evaluate your marketing results

**Expected Outcomes:**

- ◆ Eleven completed worksheets ready for formalizing into a tailored marketing plan for your program

## Chapter 1: Building an Effective Marketing Plan

*“Before anything else, preparation is the key to success.”*

—Alexander Graham Bell

Planning is about making decisions today that will have a positive impact on the effectiveness of your services, program, and organization tomorrow. Successful planning involves going through evaluative, strategic, and creative processes, in partnership with other program stakeholders, in a step-by-step fashion. This chapter describes how to build an effective marketing plan for the purposes of mentor recruitment. Carefully planning what you are going to do is the logical first step in all marketing efforts.

Having a formal written marketing plan in place supports your program in a number of significant ways, including:

- ◆ Furnishing a “shared” vision for your staff, board members, and other stakeholders. It is important for you and your staff to be unified in your actions and what you want to accomplish.
- ◆ Allowing you to formally solicit the input, ideas, time, and resources of others. This can result in greater commitment, synergies, and visibility for your program.
- ◆ Enhancing the chances of your ideas being carried out and implemented effectively in a timely fashion.
- ◆ Providing greater clarity for those responsible for implementing the plan—“a picture is worth a thousand words” holds true with planning. Including graphic timelines creates a broader perspective and encourages continuity of efforts.
- ◆ Rendering documentation for evaluating your efforts and making continuous improvements. Without a written plan in place, it is difficult to know how to determine if your program achieved all it set out to do.

Developing an effective plan does not mean you must work tediously on it for months on end. It is possible to develop a well-laid plan in just a few pages. Of course, you can also go as in-depth as need dictates or time and resources allow. If you are new to planning, it will take more effort your first time through. Even if you are an experienced planner, your planning process will benefit by reviewing the process, suggestions, and tools that follow.

While this chapter covers the basic nuts and bolts of marketing plan development, some of the material covered in Part II (on communications projects) also covers planning concepts, which will eventually help you in creating your marketing plan. For example, while this chapter covers the concept of choosing a target audience, Chapter 2 on “Creating Recruitment Messages That Appeal” discusses how to use specific information *about* a target audience in choosing how to communicate with them, which in turn, impacts your planning. Chapter 3 on “Delivering Your Recruitment Message” speaks to choosing

the right mix of media vehicles for your program; these media choices and communication strategies will eventually be documented *within* the marketing plan discussed in this chapter. So keep in mind that Parts I and II of this guide will work in tandem toward your marketing goals.

## **Pre-planning**

Managing the planning process actually starts *before* developing the contents of a plan. At this stage you know you need a marketing plan but haven't formally started the process of developing one. Pre-planning involves getting the help and commitment you need from others, determining the timeframe of your plan, and developing a project schedule to manage the planning process. This section discusses a number of key issues to consider when first embarking on the development of a marketing plan.

### **Managing the Planning Process**

Planning is one of the areas where it is crucial to solicit the involvement of others, as it is difficult to write a good marketing plan in isolation. Having input from others can add to the depth of planning ideas and make the project of planning much more manageable. Even the greatest plan can, if developed without considering the buy-in and input of other key stakeholders, be thwarted by lack of enthusiasm and commitment when it comes time to implement it later on.

Thus, a first step is to create a planning team that may include other program staff, senior organization staff, community partners, and board members. You may also want to include some of your mentors and/or mentees in the planning process to solicit their perspective and ideas. This planning team will be tasked with the overall development and completion of a plan. They should be active in developing the content and in providing input to the overall planning process. Worksheet 1 in Appendix B allows you to assign your Planning Team members and their roles. You will want to consider the current resources, priorities, and schedules of these key individuals—both for writing now and implementing the plan later on.

Additionally, getting “buy in” from the top is critical to the success of your plan. If top organization staff and board members are not committed to the development of a marketing plan, it may not take hold. You may need to “sell” them on the value of this project. Without top commitment and support, your plan's strategies will not be a high priority for staff time, dollars, and other resources. Better yet, get these decisionmakers involved in the planning process itself; their involvement will enhance their commitment.

It is important to think through the coordination and management of the planning process—otherwise, developing a marketing plan can quickly become unwieldy, chaotic, and even unproductive. Managing the planning process requires sound project management, which is discussed in more detail later in this chapter. During the first team meeting, you will want

to facilitate the development of a marketing project schedule, which identifies key milestones and sets a doable completion date for the overall plan and important date markers along the way.

Worksheet 2 is a Generic Marketing Project Schedule to aid you in managing individual projects. The following simplified marketing project schedule provides an example of typical milestones for the project of writing a marketing plan.

### Example Marketing Project Schedule: Marketing Plan Development

Marketing Activities—Plan Development	Completion Date*	Person Responsible
Form a team and assign responsibilities	June 1	Mary Johnson, Coordinator
Kick-off meeting	June 8	Mary Johnson, Coordinator
Team meeting—updates and progress reports	June 15	Mary Johnson, Coordinator
Complete environmental analysis / SWOT	June 15	Joe Greer, Program Assistant
Clarify goals and objectives	June 15	Steve Walker, ED
Team meeting—updates and progress reports	June 22	Mary Johnson, Coordinator
Identify target audience(s) and their needs	June 22	Sue Stark, Board Member
Discuss program vision and mission	June 22	Cheryl Green, Board President
Team meeting—brainstorm and determine marketing strategies	June 29	Mary Johnson, Coordinator Steve Walker, ED
Compile and write draft of written plan	July 13	Mary Johnson, Coordinator Joe Greer, Program Assistant
Compile final draft of plan	July 27	Form
Plan review and approval by Board	August 15	ED, Board of Directors
Make final edits, finalize plan, and distribute	August 22	Mary Johnson, Coordinator
Solicit team input, write planning process evaluation	August 31	Cheryl Green, Board President
Develop the first quarter's detailed activity list	August 31	Joe Greer, Program Assistant

(\* Assumes Fiscal Year Starting September 1)

## Plan Timeframe

One of the early decisions you must make when developing a marketing plan is the timeframe of the plan itself. Planning is commonly thought of as either short-term or long-term in scope. Your organization's management must determine both the short- and long-term planning needs of your program in relation to current objectives and issues being faced, as well as staff time and other resources available to undertake planning. If you have never developed a formal plan before, you might want to start with a one-year or short-term plan. As you hone your process, you may wish to add longer-term components to your efforts. Obviously, the longer the timeframe of your plan, the more visionary and less certain it will be. The following chart compares general parameters of short-term and long-term planning.

### Parameters of Short- and Long-Term Plans

Planning Parameters	Short-Term Plan	Long-Term Plan
Timeframe of plan	Usually one year	Usually three–five+ years
Frequency of planning	Annually with interim reviews	One+ year
Depth of plan	Strategic and tactical	Strategic and visionary
Budget and resources	Known budget, limited	Projected budget, less limited
Environmental analysis	More known	Less known

Short-term planning is commonly considered to be a one-year timeframe. The purpose of a short-term plan is to determine the best strategies and priority of resources that will move the organization ahead to achieve its mission and objectives. It is both strategic but also tactical in nature, meaning it is focused both on what will be done to achieve current objectives but also drills down into the finer details of how you will achieve those objectives. It provides a clear roadmap for everyone to follow in meeting key program goals set forth for the next year. And, it helps ensure you have enough people and financial resources to implement it and, conversely, ensures you fully utilize the resources available in the most effective and focused manner. For the purposes of this workbook, the focus will strictly be on developing a short-term or one-year marketing plan.

Many organizations and businesses additionally develop longer-term plans with a three-year, five-year, or even 10-year timeframe. Long-term plans attempt to capture the organization's vision into the more distant future, considering any perceived current and projected trends, client needs, opportunities, and limitations. Due to the longer-term scope, its objectives, strategies, and even budgets are more visionary than statements of accountability, and they are less detailed and tactical. Organizations vary in how often they undertake longer-term planning; some go through this process yearly while others may review their longer-term plans bi-annually or less often.

## Environmental Analysis

Once you have your team in place, have assigned key roles, and have developed a project schedule, it is time to start the planning process. The marketing planning process often begins with an analysis of your program’s environment, defined here as the surroundings, conditions, and climate your program is operating within, both internally and externally. Having a shared understanding of your program’s environment provides a solid foundation upon which to develop successful planning strategies that will achieve your recruitment goals.

Going through a formal environmental analysis will heighten your awareness of your program’s strengths and limitations. It can help you avoid unnecessary surprises and be more proactive in achieving your mission. An environmental analysis generally results in a fairly concise list of positive and negative factors, both internal and external, that have or will have an impact on the success of your program. The factors you identify will influence which strategies you develop to meet your goals and objectives.

The following table illustrates common types of internal and external factors to consider when doing an environmental analysis. The specific environmental factors relevant to your program will either currently exist or be easily projected into the near future. Some of these factors may be less tangible such as identifying potential connections with target community businesses, organizations, and the media. In particular you will want to closely examine other mentoring and nonprofit organizations you may compete with for funding, volunteers, and community awareness as well as identify what they do well, not so well, and why.

### Environmental Analysis Factors

Internal Factors	External Factors
<ul style="list-style-type: none"> <li>• Staff and board competencies</li> <li>• Current ability to meet client needs</li> <li>• Past successes and failures</li> <li>• Budget resources and constraints</li> <li>• Program reputation</li> <li>• Technological issues</li> <li>• Marketing capacity</li> </ul>	<ul style="list-style-type: none"> <li>• Community demographics</li> <li>• Relevant current issues</li> <li>• Community and business attitudes</li> <li>• Strengths, weaknesses, and activities of other nonprofits</li> <li>• Economic trends</li> <li>• Local, state, and national political climate</li> </ul>

## SWOT Analysis

One commonly used environmental analysis tool is called a SWOT analysis. SWOT stands for strengths, weaknesses, opportunities, and threats. A SWOT analysis simply lists the internal and external advantages and disadvantages that may have an impact on the success of your program. Internal environmental factors are listed as strengths and weaknesses, whereas external factors are listed as opportunities and threats.

The following chart provides a simplified example of a SWOT analysis for a mentoring program whose goal is to serve more Latino youth in their community. While not a firm requirement, the program wishes to recruit as many Latino mentors as possible.

### Example SWOT Analysis

	Positive	Negative
Internal	<p><b>Strengths</b></p> <ul style="list-style-type: none"> <li>• Successful youth mentoring program (8 years)</li> <li>• Strong, stable board of directors</li> <li>• Backdrop of solid youth &amp; family center</li> <li>• Fiscal reserves are above goal</li> </ul>	<p><b>Weaknesses</b></p> <ul style="list-style-type: none"> <li>• New executive director &amp; program coordinator</li> <li>• Media relations undeveloped locally</li> <li>• Weak awareness in community</li> <li>• No in-house marketing expertise</li> <li>• No Spanish-speaking staff members</li> </ul>
External	<p><b>Opportunities</b></p> <ul style="list-style-type: none"> <li>• Growing population of Latino families</li> <li>• 35+ large employers (200+ employees)</li> <li>• Community schools interested in partnering for mentoring</li> </ul>	<p><b>Threats</b></p> <ul style="list-style-type: none"> <li>• Several strong mentoring programs locally</li> <li>• Federal funding is unstable and declining</li> <li>• Tension in community around cultural acceptance</li> </ul>

Worksheet 3 provides a template to conduct your own SWOT analysis. A common process for conducting a SWOT analysis is to conduct a meeting using large tear sheets and gather input from other team members. Beforehand, you may want to assign individual team members to research and investigate particular factors such as other mentoring and youth programs in your area, governmental factors and the political environment, or to more closely evaluate the needs of your clients.

## Marketing Plan Components

This core section covers the basic components you need to include in your marketing plan. Your final marketing plan should leave its readers with a solid idea of what your program does and how it plans to go about achieving its marketing objectives.

While you may choose to develop a more complex marketing plan that covers multiple programs within your organization or other objectives beyond mentor recruitment, the following core components should be part of any solid marketing plan. Worksheets to help you develop these core components are included in Appendix B:

- ◆ Program mission statement
- ◆ Recruitment goals
- ◆ Target audience
- ◆ Positioning statement
- ◆ Strategies and tactics
- ◆ Timelines of key strategies
- ◆ Budget summary
- ◆ Appendix (any detailed supporting information)

The contents of your marketing plan serve to delineate your *marketing mix*, or what is also referred to as the four Ps of marketing—product, price, place, promotion. The four Ps is a classic marketing concept that offers a useful framework for thinking about and making marketing decisions and for developing marketing strategies for any product, service, or program. As shown in the following table, some adaptations need to be made when translating this concept to social marketing. For example, “product” is not confined to a physical item and can include social services such as a youth mentoring program or a meaningful volunteer opportunity. “Price” can also be much less tangible than dollars and cents and, for example, can involve the benefit of community recognition with the “price” being volunteer time.

Four Ps	Product Definition	Social Marketing Definition
Product	The product being offered	Service or benefit being offered
Price	The product’s asking “price”	What is being exchanged (i.e., time, donation, commitment, etc.)
Place	Where to get the product	Where service or program takes place
Promotion	Marketing communications and other activities used to motivate customers to “buy” your product	Marketing communications and other activities used to motivate “customers” to make an exchange

The four Ps become most relevant when developing and implementing the strategies and tactics of your plan. For instance, when developing a brochure or press release about your program (promotion) that has the objective of attracting and motivating people to volunteer as mentors, you want to tell them what they must do (price), what benefit they will get in return (product), and where and when the program activities happen (place).

### **Program Mission Statement**

Your marketing plan should begin with the mission statement for your program. If you are part of a larger organization, it is important to have a mission statement specifically for your mentoring program (keeping in mind that it should fit with the mission of the overall organization). All components of your marketing plan should be focused on fulfilling your program's mission and goals. Often within a succinct sentence or two, your mission statement will provide long-range guidance and direction for your program.

When developing a mission statement it is desirable to gain input from all key stakeholders of the organization. With an eye on desired outcomes for your program, what it does, for whom, and why, your mission statement should be a carefully crafted but simple statement of purpose that:

- ◆ Provides a positive “reason for being”
- ◆ Provides focus and direction
- ◆ Is clear and concise
- ◆ Is agreed on by the wider organization

The following sample mission statement is for a program serving grade school and middle school youth needing additional adult role models in their lives. While this statement is fairly generic to many mentoring programs, there is an emphasis on helping youth envision success in their futures:

“The mission of Friends to Central County Youth is to make a positive impact on youth, ages 8–14 in Central County by matching them with an adult friend who will foster a sense of self-competence and a positive outlook for the future.”

A wealth of articles, books, and Web sites exist that delve deeper into the development of an effective mission statement. Worksheet 4 provides questions, tools, and a template for developing or revising your own mission statement.

### **Recruitment Goals**

Your program undoubtedly has a strong purpose. It is imperative, however, that your mission or purpose be translated into clearly definable and achievable goals. These goals may be written in various ways. Specific goals will facilitate both the development of actionable strategies and the measurement of whether you have achieved what you set out to accomplish. The following four goal structures may assist you in clarifying your program's goals across any number of areas, including mentor recruitment (Nickols, 2000):

- ◆ What you want that you don't have? (Achieve)
- ◆ What you want that you already have? (Preserve)
- ◆ What you don't have that you don't want? (Avoid)
- ◆ What you have now that you don't want? (Eliminate)

Mentor recruitment goals are usually stated in terms of what you want to achieve and are quantifiable, making it easy to measure their results. A common example of a recruitment goal is: *To recruit, screen, train, and match 25 adult volunteers within the next year.* While this goal may seem straightforward, you may realistically need to recruit, screen, and train many more than 25 prospective mentors in order to make 25 matches, given some percentage of applicants will either not pass your screening criteria or will self-select out of the process along the way. This more realistic perspective will impact your marketing planning efforts. You may want to alter your recruitment goal to be more specific by incorporating an estimate of total applications you will need to receive to make 25 matches.

Worksheet 5 offers a form for writing your program recruitment (and other) goals as well as specifying the criteria by which you will measure results.

### **Target Audience**

Your marketing plan needs to state who your target audience is. It is important to remember that all good recruitment is targeted. Using a “shotgun” approach to mentor recruitment—trying to reach everyone with a single approach—often leads to watered-down results. This means that the most effective way to recruit mentors is through targeted efforts at specific populations of people. Sometimes you may have more than one target audience, in which case it is common to state a primary audience and one or more secondary audiences.

It is best to strategically determine which populations in your community would best fit the recruitment needs of your program. This includes looking at the specific design of your program, meeting times and locations, and the youth population you are serving, as well as any other special issues about your program. Targeting specific groups in this way will affect the content of your promotional materials, the types of organizations you approach, the days and hours you do face-to-face recruitment, and so forth.

For example, if your program works with middle and high school girls and has a goal of steering them toward achieving a postsecondary education, targeting female students from a nearby college makes sense. It may not be the only group you choose to target, but college students are attractive given they are currently in the college process and may have a closer “peer” appeal to your clients. Prioritizing target audiences is often done based on benefit to your program as well as expected ease of recruiting from a particular group.

Worksheet 6 provides a format to help you determine the best target audience(s) for your program, and includes space to list the pros and cons of each particular group. It then allows

you to prioritize those groups that make the most sense to “target.” Chapter 2 on “Creating Recruitment Messages That Appeal” explores how to better understand target audiences for the purposes of more effectively communicating with them.

### **Positioning Statement**

The concept of a positioning statement is often confusing at first. However, a positioning statement is crucial to the development of your marketing plan, and especially your marketing communications. This section will acquaint you with the concept of positioning statements and will help you write one for the purposes of marketing planning. You will also want to read the section on Positioning and Communications in Chapter 2, which discusses the nuances of how positioning impacts the effectiveness of your marketing communications.

So what is a positioning statement? Simply put ...

## **K E Y   C O N C E P T :**

**... a positioning statement is a concise statement that uniquely positions your program and its services within its external and competitive environments.**

Positioning is about intentionally building your reputation. It defines how you want your program to be viewed and considers the competitive set of other nonprofit organizations and especially other mentoring programs. This means proactively determining the image you want to project to your clients, volunteers, and the general public.

A positioning statement defines what is unique about your program, but also what it is that you do better than anyone else. In essence you are defining your niche and boasting about what you do the best and why. In developing a positioning statement for your program, consider including the following qualities:

- ◆ Convey the *desired* perceptions, image, and reputation of your program
- ◆ Connote a sense of urgency
- ◆ Be short and to the point
- ◆ Use easy-to-understand language

To alleviate confusion, a positioning statement differs from a mission statement in several ways. Mission statements clarify your program’s purpose for being, whereas a positioning statement reflects how you want your program to be viewed by others. While a mission statement is often made available to the public, a positioning statement is often only used internally. The following table provides examples of respective mission and positioning statements for three fictitious nonprofit organizations, the first being a mentoring program. The mission statements

are visionary and govern the overall direction of organizational activities, whereas the positioning statements provide a desired image or reputation the organization wishes to achieve.

### Example Comparisons of Mission and Positioning Statements

Worksheet 7 is designed to help you develop a positioning statement for your program.

Mission Statements	Positioning Statements
<ul style="list-style-type: none"> <li>The Friend Connection strives to provide positive role models and open new windows of opportunity by creating empowering relationships in the lives of youth, ages 7–18.</li> </ul>	<ul style="list-style-type: none"> <li>The Friend Connection positively changes young lives every day in powerful, productive, and supportive ways by providing a special one-on-one adult friend and the caring guidance of the state’s largest and oldest mentoring program.</li> </ul>
<ul style="list-style-type: none"> <li>Central County Volunteer Association works to engage more people more effectively in volunteer service to help solve vital social problems throughout our county.</li> </ul>	<ul style="list-style-type: none"> <li>Central County Volunteer Association is the best source for understanding our community’s crucial social needs and connecting talented volunteers to the needs of high-impact social programs and projects.</li> </ul>
<ul style="list-style-type: none"> <li>The mission of the Grantwriters Resource Center is to affordably develop and deliver leading knowledge expertise to the field of grant writers everywhere.</li> </ul>	<ul style="list-style-type: none"> <li>When I use the Grantwriters Resource Center, I am confident I have the ability to find and develop winning proposals because I have access to the best knowledge base and collection of leading-edge grant information, publications, training, technical assistance, and networking—at the lowest cost available. (Written from target audience perspective.)</li> </ul>

### Strategies and Tactics

Strategies and tactics are the very core of your marketing plan. Marketing is about getting things done and the strategies and tactics you choose will fuel the success of your recruitment efforts. Together, they represent the “action” of your marketing plan. Taking the time to think about your situation strategically means keeping a keen focus on your goals while determining the best actions to meet those goals.

## K E Y C O N C E P T :

**Strategic thinking is about doing the right things to achieve a goal.**

A *strategy* is a course of action created to achieve a future goal and may be multifaceted in design, whereas a *tactic* is a more detailed activity or set of activities that support a given strategy. By definition, you need to develop strategies, or the bigger picture, first. In fact, some details or tactics may evolve later as you begin to implement various strategies throughout the planning year.

As an example, a common recruitment *strategy* is to hold monthly orientation sessions for prospective mentors. Examples of *tactics* for this strategy might be to hold these orientation sessions in fun environments such as at a park or private room at a pizza parlor. Another example recruitment strategy is to utilize current mentors as much as possible in your recruitment efforts. Utilizing current mentors to speak at orientation sessions then becomes a tactic of both strategies. These strategies and tactics may be included in your plan now, but over the course of the year, you may come up with other ideas for making your orientation sessions fun and interesting, as well as finding other ways to have mentors help with recruitment.

Developing creative recruitment strategies is essential. You want to develop inventive ideas that will positively move your program toward achieving its goals. Brainstorming with your planning team around specific strategies and tactics is a good approach. Utilizing the synergy of your entire team for coming up with broad-stroke strategies is highly effective. Additionally, getting them involved now will increase their commitment to putting the ideas into action later on. Once you have generated a good list of ideas, your planning team will need to evaluate and prioritize each strategy based on its potential effectiveness as well as the resources available to implement it.

Choosing the best strategies to fit your mission, objectives, program design, target audience, and resources is crucial. A program should not necessarily pursue every opportunity or address every weakness identified in an environmental analysis. For example, you may choose not to pursue a solid opportunity you've identified because you feel your staff does not have enough experience to implement it well. Conversely, you may wish to work at overcoming a weakness to pursue a compelling opportunity, such as targeting a particular group of prospective mentors that your program has had less success with in the past.

Worksheet 8 provides a template for developing strategies tied to specific recruitment goals, as well as the tactics to support each strategy.

### Marketing Plan Timeline

An important component of your plan is the development of a timeline that visually illustrates your recruitment strategies over the course of the planning year. The old adage that “a picture is worth a thousand words” applies here. Having this visual reference provides a “bigger picture” perspective of your plan’s strategies and how well the entire

planning year is “covered.” Timelines also lend themselves to more on-time project management when implementing the strategies, as staff can easily refer to the plan timelines as a guide.

A simple and effective style for creating a visual timeline is to use spreadsheet software or a word processing table to shade in areas with planned activities across a year. The number of goals included within your plan, the size of your budget, and the number of strategies you are undertaking will all affect the complexity you choose to display visually. Worksheet 9 provides a template for creating a marketing plan timeline.

### **Budget**

Projected costs of your strategies and tactics should be summarized somewhere within your plan. It is common to have a budget summary early in your written plan, as key stakeholders will want to know the financial implications up front. These costs should represent close estimates even though final breakdowns of costs may not be known until strategies are actually implemented throughout the year. The table below provides a simple example of a marketing plan budget summary. The format of your budget summary will likely depend on how your internal accounting system and the detail your organization’s management wishes it to be displayed. If data are available, you may wish to add columns showing historical budget comparisons with prior years to demonstrate where there are changes in activities.

#### **Example Marketing Plan Budget Summary**

<b>Marketing Activity</b>	<b>Fiscal Budget</b>	<b>Percent of Total</b>
Printed materials	\$2,000	44%
Community events	1,000	22%
Orientation sessions	200	4%
Advertising	800	18 %
Miscellaneous	500	12%
<b>Total</b>	<b>\$4,500</b>	<b>100%</b>

The finer details of your budget should be included in the Appendix of your plan. Worksheet 10 provides a sample marketing plan budget summary.

## **Appendix**

Most likely, a program coordinator or manager will be the primary user of your marketing plan once completed. However, you want your marketing plan to be in depth enough so that other stakeholders who wish to read it will have a clear picture of your program's goals and marketing strategies—without getting lost in the details. It is best to keep the finer details in an Appendix in the back of your plan. This may include detailed budget or cost analyses and supporting rationale and analyses of key strategies.

## Post-Planning

*“An idea can turn to dust or magic, depending on the talent that rubs against it.”*  
—William Bernbach, Advertising Executive

### Implementing the Plan

Once your marketing plan is complete, you must effectively implement the strategies and tactics you’ve developed. Having solid strategies and implementing them well is what leads to the greatest success when recruiting mentors.

It is common to think of marketing as a finished product or outcome of one type or another—a marketing plan, brochure, press release, or event. However, in order to reach completion, each was also a project that had to be managed. Applying the principles of good project management will help you tackle the wide diversity of tasks for which you are responsible and help improve results when implementing your marketing plan.

### **K E Y   C O N C E P T :**

**Project management is the effective and simultaneous management of tasks, resources, time, and money to meet a specified goal.**

Project management details what must be done (in what order) what resources and people are needed, where approvals must be obtained, and when project meetings should be held. How you go about managing these details will depend on the size of your organization or program, your financial and human resources, and the complexity of each individual project. Project management essentially involves organizing and orchestrating a number of elements to achieve a desired end result:

- ◆ The overall project **goal** or desired end result. This involves determining the scope or size and depth of a project, as well.
- ◆ The individual **tasks** or **activities** and the **order** in which they need to be completed.
- ◆ The costs of the individual tasks and overall project; the budget.
- ◆ Creating a **team** of individuals needed to complete the project and defining individual responsibility and authority to complete the work.
- ◆ Facilitating **communication** within the team via team meetings, protocols, schedules, and written messages.
- ◆ Developing a **schedule** of tasks, who is responsible for them, and due dates for completing them.
- ◆ Regularly or continuously **monitoring** the progress of the project against the goal, budget, and schedule of the project.
- ◆ Making **adjustments** and undertaking **contingency planning** as necessary to achieve the goal.

- ◆ **Evaluating** the project once completed to determine effectiveness of results and process.

The following table offers an example of a marketing project schedule detailing a mentoring program's marketing activities for an entire calendar quarter. A good example of a marketing project schedule, illustrating the *single* project of writing a marketing plan, was provided earlier in this chapter in the section on preplanning.

Worksheet 2 in the Appendix is a Generic Marketing Project Schedule to use for managing the implementation of your marketing plan.

### Example Marketing Project Schedule: First Quarter Marketing Activities

Marketing Activities—First Quarter, 2004	Date Complete	Person Responsible
<b>Marketing Activities</b>		
Inquiry responses—web, phone, e-mail	Daily	Program Coordinator
Mail out first quarter newsletter	1/1	Officer Manager
Distribute brochures, flyers	Weekly	Program Coordinator, Board members, other staff
Mentor orientation session, 7–9 p.m.	1/11	Program Coordinator
Display table—Central Community College	1/20	Program Coordinator
Contact rotary—request to speak at Q2 meeting	1/31	Program Coordinator
Meeting/presentation—Winwood Hospital	2/5	Board President, Exec Director
Mentor orientation session, 7–9 p.m.	2/11	Program Coordinator
Chamber luncheon speech	2/20	Board member, Program Coord
First quarter review, second quarter planning mtg	2/27	Program Coordinator
Meeting/presentation—United Ministries	3/4	Exec Director, Program Coord
Mentor orientation session, 7–9 p.m.	3/11	Program Coordinator
Senior community center lunch presentation	3/15	Program Coordinator
Board meeting presentation	3/13	Exec Director, Program Coord
Radio interviews—KNEWS	3/2	Program Coordinator
<b>Marketing Materials Development</b>		
Update brochure—new copy, photos	1/31	Program Coordinator
Press release/PSA—new Board President announcement	2/1	Program Coordinator
Web site update—add page for Board w/pictures	2/15	Program Coordinator
Write newsletter—second quarter	3/25	Program Coordinator

## **Plan Evaluation and Review**

While the development of your marketing plan should have definite start and completion dates, planning is, in a sense, an ongoing process. As you complete your written marketing plan and begin implementing its strategies, you must also begin monitoring its effectiveness and make adjustments along the way. If a particular strategy is working well, you may choose to do more of it, and less of something else. Likewise, if a planned strategy is not bringing the results you hoped for, you may want to evaluate why and make any adjustments as necessary. Don't wait until next year's planning process to make needed corrections.

However, a marketing strategy producing lower than expected results may not necessarily be poor strategy. The results of a given strategy can be affected by a number of factors including environmental changes, a difficult to penetrate target audience, timing issues, or how well the plan was implemented. You must be flexible and ready to refine your marketing plan as needed.

As an example, if a key organization you have been approaching for mentor recruitment is not panning out, it may be the person contacted wasn't interested and you need to find another person who can champion the idea within the organization. Or you may need to solicit the help from other stakeholders such as board members to see if they have contacts they can approach in the target organization. It is also possible that your follow-up with the organization may not have been thorough enough, and that simply more persistence is needed. Or, it may be the organization recently decided to support another community effort and you need to try again later.

In other cases, you may need to abandon the strategy altogether. For example, your plan may include a strategy to implement an advertising campaign using small weekly ads in your local newspaper. Ad space costs money and after the first quarter you only received two inquiries from this effort. You may then want to evaluate the impact of the ad itself and whether to continue placement of the ad. It may be the ad itself is fine but placement was poor and you either cannot control this or it costs more to get good placements. You may determine that most of your current mentors applied via word-of-mouth and that the cost effectiveness of your ad strategy is not worth continuing even though you have the budget to do so.

Worksheet 11 is a Mentor Recruitment/Marketing Tracking Form, which can be used to track where prospective mentors heard about your program. This is a simple but effective way to measure which strategies and tactics are working well for you. At their first point of contact, inquire about where a prospective mentor heard about your program while the information is still fresh in their minds.

## **Marketing Plan Review Meetings**

You do not need to undertake marketing planning activities every day, but you should keep a watchful eye on the ongoing effectiveness of your plan. One sound evaluation strategy is to conduct monthly or quarterly marketing plan review meetings. Reconvening your planning team quarterly to review results and brainstorm any adjustments for the next timeframe can be very effective and well worth the effort. These meetings can produce a number of positive outcomes:

- ◆ Objective review of plan results to date
- ◆ Acknowledgment of changes in your internal and external “environment”
- ◆ Brainstorm new strategies and tactics as needed for the next quarter
- ◆ Draft the details of upcoming marketing strategies

Finally, it is a good idea to conduct a thorough review of your entire plan once a year, before developing the next year’s plan. This means stepping back and reviewing the year’s marketing efforts, including any adjustments made along the way.

## **Sample Marketing Plan**

The following two pages illustrate a simplified marketing plan for a fictitious start-up community-based mentoring program named Nearwest Mentoring Program. The program serves disadvantaged youth 14–18 with a focus on career direction, with college placement being highly desirable. Career/life planning, school engagement, and asset building are formal components of the program.

Youth will be matched 1:1 with a professional adult in the Nearwest community. Matches are expected to meet a minimum of 10 hours per month and must engage in career-focused activities and/or discussions at least 25 percent of their time together. Youth must be enrolled in the Nearwest school district and can be referred based upon any number of risk factors present in their lives or need/desire to have an adult friend and role model. Mentors will be recruited, trained, and matched based on compatibility with youths’ interests and willingness to facilitate youth self-evaluation, career exploration, and a sense of community service. All youth and mentors are expected to attend quarterly trainings and other match activities.

The Nearwest Mentoring Program is in start-up mode with one full-time coordinator, one part-time staff person, and limited funding. Marketing strategies were developed across three categories of activities: promotional, personal contact, and public relations. Advertising was not deemed affordable in this start-up year but will be evaluated as strong opportunities present themselves. Marketing/recruitment activities will be continuous throughout the year. Emphasis will be placed on developing personal contacts, delivering presentations, and building media relationships in the community. Board members and mentor volunteers will be engaged in this activity to the extent possible.

## **Nearwest Mentoring Program 2005 Marketing Plan**

### **Mission Statement:**

To instill a strong sense of life and career planning in Nearwest youth, 14–18 years old, by providing them with a career-minded adult friend and role model.

### **Recruitment Goal:**

Attract, screen, train, and match 30 *career-minded* mentors with Nearwest youth in 2005.

### **Target Audience:**

Primary: Professional adults employed by the area's eight largest corporations

Secondary: Recently (fewer than five years) retired professionals

### **Positioning Statement:**

Nearwest Mentoring Program makes a lifelong impact on the lives of youths by developing life/career planning skills and building strong internal and external assets including citizenship, integrity, and responsibility.

### **Marketing/Recruitment Strategies:**

#### Promotional Activities

- ◆ Develop and place program brochures and flyers throughout the community—frequently
- ◆ Distribute newsletter—quarterly
- ◆ Secure display tables at local events—as available
- ◆ Develop program Web site—continuous

#### Personal Contact

- ◆ Hold mentor orientation sessions—monthly
- ◆ Develop and deliver professional program presentations—one to two per month
- ◆ Make targeted contact with various community businesses, professional and service associations, senior and retirement centers—three to four per month
- ◆ Attend chamber meetings, informal gatherings, special lunches—monthly or more often
- ◆ Attend all board meetings; update board and solicit recruitment assistance—monthly
- ◆ Develop and deploy recruitment drives involving board members, mentors—semi-annually

**Public Relations**

- ◆ Develop press kit—program story, brochure, press releases
- ◆ Distribute press release and PSA to local media—quarterly or as needed
- ◆ Build media relationships—minimum two to three contacts per month
- ◆ Develop and distribute success or need stories to the media—semi-annually

**Budget Summary:**

<b>Marketing Activity</b>	<b>Fiscal Budget</b>	<b>Percent of Total</b>
Brochures, flyers, printed materials	\$1,500	38%
Newsletters	1,000	25%
Promotional activities—miscellaneous	500	12%
Press kit	300	8%
Chamber membership	200	5%
Miscellaneous	500	12%
<b>Total</b>	<b>\$4,000</b>	<b>100%</b>

## Marketing Plan Timeline

Marketing	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
<b>Promotional Activities:</b>												
Brochure and flyer distribution												
Program newsletter												
Local events (1/4 quarter TBD)												
Web site/online inquiry form												
<b>Personal Contact:</b>												
Orientation sessions: monthly												
Local presentations: 1-2/month												
Business/organization contacts: 3-4/month												
Chamber meetings: monthly+												
Board meetings: monthly												
Recruitment drives												
<b>Public Relations:</b>												
Press kit												
Press release/PSA distribution												
Media contacts: 2-3/month												
Media news stories												

**KEY**

Marketing Activity

In Development

Specific Dates TBD

## Marketing Planning Resources

### Print:

Allison, M., & Kaye, J. (1997). *Strategic planning for nonprofit organizations: A practical guide and workbook*. New York,: Wiley.

Andreason, A., & Kotler, P. (2002). *Strategic marketing for nonprofit organizations* (6th ed.). Englewood Cliffs, NJ: Prentice-Hall.

Ballasy, L., Fulop, M., & St. Amour, D. (2003). *Generic mentoring program policy and procedure manual*. Portland, OR: Northwest Regional Educational Laboratory, National Mentoring Center.

Barry, B. (1997). *Strategic planning workbook for nonprofit organizations* (Rev. ed.). St. Paul, MN: Amherst H. Wilder Foundation.

Brinckerhoff, P. (2003). *Mission-based marketing: Positioning your not-for-profit in an increasingly competitive world* (2nd ed.). Hoboken, NJ: Wiley.

Garringer, M. (with Fulop, M., & Rennick, V.). (2003). *Foundations of successful youth mentoring: A guidebook for program development*. Portland, OR: Northwest Regional Educational Laboratory, National Mentoring Center.

Jucovy, L. (2001). *Recruiting mentors: A guide to finding volunteers to work with youth*. Portland, OR: Northwest Regional Educational Laboratory, National Mentoring Center.

Smith, Bucklin & Associates. (2003). *Complete guide to nonprofit management* (2nd ed.). Hoboken, NJ: Wiley.

Stern, G., & Centor, E. (2001). *Marketing workbook for nonprofit organizations. Vol. I: Develop the plan* (2nd ed.). St. Paul, MN: Amherst H. Wilder Foundation.

Webster, B. (2000). *Going to market: Marketing concepts for mentoring programs*. Folsom, C: EMT Group. Retrieved June 6, 2004, from <http://emt.org/publications.html>.

### Web:

Bplans.com—[www.bplans.com/c/about.cfm](http://www.bplans.com/c/about.cfm)

Learn Marketing —[www.learnmarketing.net/product.htm](http://www.learnmarketing.net/product.htm)

Social Marketing Institute—[www.social-marketing.org/aboutus.html](http://www.social-marketing.org/aboutus.html)

Strategic Marketing Plan Template, Senior Corps Tech Center Marketing Learning Path—[http://seniortechcenter.org/learning\\_paths/marketing/tips\\_tools\\_and\\_templates/strategic\\_marketing\\_plan.php](http://seniortechcenter.org/learning_paths/marketing/tips_tools_and_templates/strategic_marketing_plan.php)

## **PART II: MARKETING COMMUNICATIONS**

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*Doing marketing means you want someone to do something, be it purchase a product or service, make a donation to your organization, or volunteer time and expertise. Divided into two chapters, Part II explores how to create and deliver effective messages to prospective mentors.*

### **Chapters and Sections in Part II:**

#### Chapter 2: Creating Recruitment Messages That Appeal

- ◆ Knowing Your Target Audience
- ◆ Positioning and Communications
- ◆ Developing Your Message
- ◆ Testing Your Message
- ◆ Crafting Consistency Into Your Message

#### Chapter 3: Delivering Your Recruitment Message

- ◆ Impressions Count
- ◆ Choosing Your Media Mix
- ◆ Promotional Materials
- ◆ Personal Contact
- ◆ Public Relations
- ◆ Advertising
- ◆ Design Elements

### **This Part:**

- ◆ Discusses special issues in managing communication projects
- ◆ Explores demographic and psychographic traits of target audiences
- ◆ Examines the importance of positioning in marketing communications
- ◆ Introduces the concept of branding—whether your target audience is familiar with and how they perceive your program
- ◆ Suggests how to build your awareness and knowledge of branding
- ◆ Describes several important elements to consider in creating your messages
- ◆ Explains the high importance of testing your message
- ◆ Promotes consistency in your message across various media options

- ◆ Covers key communications concepts of “reach” and “frequency”
- ◆ Explores four broad media categories for effectively delivering your message
- ◆ Discusses important decision criteria for choosing your media
- ◆ Provides basic tips for effective graphic design

### **Activities You Will Do:**

- ◆ Learn the purpose of and how to use a marketing communication worksheet
- ◆ Uncover key target audience traits as an aid in communicating with them effectively
- ◆ Draft a core message for recruiting mentors
- ◆ Test your message with your selected target audience
- ◆ Develop a detailed budget worksheet for your marketing communication activities

### **Expected Outcomes:**

- ◆ Clear process and enhanced ability to develop effective communication messages
- ◆ Greater repertoire of media options and insight for making sound media decisions

## PART II: MARKETING COMMUNICATIONS

*“Not everything that can be counted counts,  
and not everything that counts can be counted.”*

—Albert Einstein

If you review the strategies and tactics of your marketing plan, you will quickly discover that nearly every marketing activity you have planned requires communicating to someone. A key component of the planning process is to define a target audience, the group you want to “market” to. The specific goals and strategies of your marketing plan undoubtedly involve a desired action from your target audience—in this case to get people to volunteer as mentors. The only way to get them to do that desired action is to find, connect, and persuasively communicate with them.

Unfortunately, marketing communications is an area that involves considerable subjectivity. The messages and graphics you create for your program cannot be graded as simply “right or wrong.” While some people may really like a particular message, it will have little or no appeal to others. Judgment, creativity, and personal preference are at play in how marketing communications are both created and received.

This part of the workbook is composed of two chapters. The first, “Creating Recruitment Messages That Appeal,” discusses how to develop effective messages targeted to a specific audience. The second chapter, “Delivering Your Recruitment Message,” reviews some valuable media concepts, message delivery options for your program, public relations strategies, and the basics of good graphic design. Additional worksheets specific to marketing communications are provided in Appendix B.

While creating messages and delivering them are discussed separately here, the activities are interrelated in action. The message, and who it is targeted to, can influence the vehicles you will choose. And, the vehicle used can greatly affect the exact content of your message. For example, if you are targeting seniors, you may choose to use brochures, senior center newsletter ads, and presentations to recruit them. If you are targeting college students, developing electronic messages such as Web pages and CDs may be more appealing. Likewise, the amount and writing style of the content placed in a brochure will likely be quite different than that placed in an ad or on a Web site.

### **Managing Communications Projects**

While marketing communications are not the only projects you may manage as part of your marketing plan, they will comprise a significant portion of them, and they have a number of special factors. Because marketing communications projects can involve considerable creativity (creativity you want to foster), how you manage them requires special attention. A sound project management process can greatly enhance your communications results.

Worksheet 2, the generic marketing project schedule, can aid you in effectively managing the details of your marketing communication projects. Using the “nuts and bolts” of basic project management, as described in the previous chapter, can also aid the effectiveness of your marketing communications. Similar to managing *any* project, this includes establishing key project milestones along the way, such as meetings, project objectives, revisions, staff/board input and approvals, testing, and completion dates.

Unlike your overall marketing planning, where it can be helpful to have more people involved to add ideas, experiences, and resources, having too many people involved in the process of developing communications projects can actually dilute the end results. In this case, *less is more*. Having too many people involved often means everyone wanting some part of their ideas in the final message, which can result in a message that is a hodge-podge of words rather than a sharp, spirited, and focused message. While it is likely that your agency director and board president will want to be involved, or at minimum provide review and approvals, your creative team may be as small as yourself, one or two other staff persons, a copywriter, and a graphic designer.

It is best to designate a single person as copywriter and/or for graphic design. The copywriter is responsible for drafting initial message concepts, incorporating any feedback provided via testing or program staff, and then developing the final, polished versions of the message. Similarly, a single graphic designer should be involved from start to finish, providing initial concepts through final revisions.

Further, your communications do not have to be expensive to be effective. Many programs, especially those in start-up mode and in grassroots community organizations, must create their own brochures, flyers, and advertising in-house. You may have a current staff person, board member, or volunteer who has experience and background in either writing or graphic design. However, it is preferable to use professional talent both for writing and graphic design, if at all possible. Finding in-kind donations or reduced fees from local professionals can be well worth the effort. Another source of talent is local college students or recent graduates who are seeking opportunities to build their portfolios.

As the individuals responsible for writing your message and designing your graphics are identified, you will want time to help them understand the communication project at hand. Worksheet 12, the Marketing Communications Worksheet, provides a useful format for describing the project, what it hopes to achieve, the target audience, your positioning statement, desired tonality, and key program features and benefits. This is a common tool used for clarifying and communicating the scope and objectives of any communication project, whether doing the writing and design work yourself or using someone else (either internal or external to your organization). The following table provides direction for the contents of a marketing communications worksheet.

## Marketing Communications Worksheet

Worksheet Categories	Description
Project Description	Describe what the project is. Examples include: <ul style="list-style-type: none"> <li>• Create crisp, catchy program slogan that will draw and keep attention of all target audiences</li> <li>• Develop clear, concise message effectively persuading prospective mentors to volunteer</li> <li>• Develop recruitment brochure to be utilized in a variety of mentor recruitment environments</li> </ul>
Project Objective	Desired results. Tie to specific recruitment objective—Worksheet 5.
Target Audience	Define and describe your target audiences for the given objective—Worksheets 6 and 13
Positioning Statement	State your positioning statement, connoting the desired image you wish to evoke—Worksheet 7
Tonality and Graphic Requirements	Convey desired spirit or personality of your program—often emotion-laden words or phrases such as up-beat, sincere, caring, warm, exciting, etc.
Key Features of Program	State program purpose and key elements of how and why it works that are important to the project
Key Benefits to Target Audience	What is in it for mentors? Limit to, and prioritize, top three benefits—Worksheet 13

## Chapter 2: Creating Recruitment Messages That Appeal

*“When ideas fail, words come in very handy.”*

—Goethe

You may have the best advertising placement, speaking opportunity, or graphic design talent, but without a well-developed message, all can be lost. You want your target audience to notice your message, and for it to influence them to respond in the way you are hoping. What you tell them about your program needs to be positive, persuasive, and consistent. All representatives of your program must be able to consistently tell others what your program offers, why, and what you want others to do to help.

Developing effective communication messages begins with an understanding of who your target audience is and ends when your message is tested, and sometimes retested, until it is “approved” by your target audience. This chapter covers a number of key topics about how to create appealing messages.

### Knowing Your Target Audience

*“Teenagers travel in droves, packs, swarms... To the librarian, they’re a gaggle of geese. To the cook, they’re a scourge of locusts. To department stores, they’re a big beautiful exaltation of larks... all lovely and loose and jingly.”*

—Bernice Fitz-Gibbon, Director of Advertising, Macy’s

All marketing communications require having someone to “talk to,” someone you hope will be listening (ideally, someone you hope will really hear and respond in the way you are hoping). As discussed earlier, determining the right target audience for your program is a crucial element of any marketing plan. When developing communication messages, it is imperative to *understand* your target audiences as well as possible.

A target audience is usually defined in terms of *demographics* and/or *psychographics*. Understanding these two concepts can help you uncover a wealth of information about the target audience with which you want to communicate.

#### Demographics

Demographics are used to define a group of people by tangible and measurable traits or conditions such as age, gender, education level, income level, career type, language, and location. Using demographics is the most common way to define or describe a group, often because the information is easier to attain and/or observe. When defining a target audience demographically, you may use one, only a few, or a number of demographic quali-

ties depending on how targeted you wish to be. An example of a tightly defined target audience based on demographics is “bilingual, college educated, professional Latino men, age 35–50, living in specific zip code areas of Chicago, IL.”

## **Psychographics**

Psychographic traits can include attitudes, values, beliefs, opinions, interests, tastes, activities, and general perspectives. Psychographics represent qualitative versus quantitative and objective data, meaning these traits are more difficult to define and measure. While true for an individual, it can be more of a challenge to generalize any of these “softer” traits across an entire group or target audience of people.

### **Demographic and Psychographic Traits and Qualities**

<b>Demographics</b>	<b>Psychographics</b>
<ul style="list-style-type: none"> <li>• Age</li> <li>• Gender</li> <li>• Education level</li> <li>• Income level</li> <li>• Career type</li> <li>• Language</li> <li>• Location</li> </ul>	<ul style="list-style-type: none"> <li>• Attitudes</li> <li>• Values</li> <li>• Beliefs</li> <li>• Opinions</li> <li>• Interests</li> <li>• Tastes</li> <li>• Activities</li> <li>• General perspective</li> </ul>

An obvious example highlights the usefulness of psychographics. It doesn’t take a stretch of the imagination to think about teenagers and some of the differences between them as a group and senior citizens as a group. In this case the demographic difference is obvious as the groups are differentiated based upon age, income, careers, etc. Psychographically, however, the group differences become much more dynamic and quite divergent when you think about variances in styles of dress, speech, diet, histories, experiences, attitudes, interests, level of activity, and values. The quote at the beginning of this section illustrates that once a group becomes a “target” for an organization, understanding them psychographically can change how you view them and strongly influence how you will want to communicate with them.

Psychographic qualities may be gathered in a number of ways including careful observation, secondary research, focus groups, and individual (or small-group) interviews. A good way to find out more about the psychographics of your target audience is to gather examples of messages to which they already respond. This can help you understand the language and context they may be most open to. For example, if you are targeting retired citizens for your mentoring program, go to a senior center and see if there is a newsletter. Find a bulletin board and review the flyers. What kinds of magazines are lying around in community areas?

This principle can be applied to any number of target markets: teenagers, Latinos, African Americans, professional women, police officers, and so forth.

Knowing both demographic and psychographic traits of your target audiences will help you know how to approach them, what is important to them, and how their lifestyles influence decision-making. Using the example of the professional Latino men above, you may find their psychographics include enjoying city life such as the many art and cultural experiences it offers, an interest in reading and education, and spending time among others of their same cultural group. This may influence the types of things you tell them they can do with a youth and how their interests, such as valuing education, can be a great help to the youth they will mentor. Knowing how to talk to them in their everyday language will help them be more open to listening and responding to your message.

Worksheet 13 in Appendix B, *Understanding Your Target Audience*, provides a template for you to examine each of your target audience groups more closely including the demographics, psychographics, and the perceived benefits to your target audience. Set priorities among which benefits you think are most important to your mentors and why. You will want to keep that priority clear in all versions of your message.

## Positioning and Communications

*“Everyone wants to be Cary Grant. Even I want to be Cary Grant.”*

—Cary Grant

As introduced in Chapter 1, positioning refers to how your program or organization chooses to portray itself within its external and competitive environment. Positioning is heavily utilized in marketing to consistently convey your program’s ideal image across all communications. Your positioning statement thus becomes the basis for creating a program slogan, writing core messages, and developing marketing materials such as brochures, Web sites, or advertisements.

The reality is, your program exists to provide quality mentoring services that support the mission of your agency. *Image* becomes important as soon as you need to acquire something, such as participants (youth, school staff, mentors, etc.) or funding to run your program. It is important to actively choose and manage your program’s image among your various target audiences or “customers.” You must present your program in a way that will compel others to buy into it.

A positioning statement is not the same as advertising headlines, slogans, or main communication points. It is a communication platform upon which you create your messages, providing a needed thread of consistency that is conveyed throughout your marketing communications. Your positioning statement sets the standard of what you want your target audience to perceive about your program.

## **Branding**

Branding is similar to positioning. However, branding reflects the degree to which your target audience actually associates your desired positioning or reputation with your program. Branding has to do with familiarity. It refers to the degree to which your target audience is aware of your program, understands its uniqueness, and strongly and favorably attunes to its services and what it stands for.

### **K E Y C O N C E P T :**

**Branding is the intentional process and actions of a program or organization to build recognition and reputation with its customers.**

Creating a brand image is beneficial to an organization in that it creates lasting familiarity and understanding of what it stands for. Examples of strong national nonprofit “brands” include the Red Cross, Goodwill Industries, United Way and, in mentoring, Big Brothers Big Sisters. Each of these organizations has become a household name by establishing clear images in the minds of most Americans. To be sure, each organization has put much effort into making that happen. The concept of branding for nonprofit organizations is no different than for corporations in the for-profit sector that have established strong *brand recognition*.

The process of branding begins by carefully choosing a program name, logo, slogan, communication message, delivery vehicles, and graphics—all based upon your desired positioning. This is not to say branding is just a matter of marketing finesse. How well you deliver your services and conduct your program operations also contribute to the strength of your brand over time.

Establishing a strong brand builds what marketers call “equity” for your program. Brand equity refers to the positive value that comes from having a solid reputation. Having strong brand equity results in people telling others about your program, making referrals and donations, and/or volunteering for your program. In other words, the more your target audience knows, trusts, and likes your program, the more they will speak highly of your program, and repeatedly participate in supporting your program.

## **Building Branding Into Your Marketing Efforts**

One of the best ways to develop a strong positioning statement and begin creating your brand is to look around at other organizations, programs, products, and services. Start with your closest competitive set: other nonprofit organizations. As mentioned previously, your program competes with a wide variety of other nonprofit organizations, not just mentoring programs in your local area.

Start paying attention to the marketing communications that exist all around you. Pick up any free flyers, brochures, business cards, and pamphlets you come across in your community and start keeping them in a file. Especially notice the ones you like and materials for programs similar to your own. Cut out ads in magazines and papers, surf the Internet looking for Web sites of both local programs and national nonprofit brands. Listen to radio and television commercials, even for commercial products and services. Notice the ones you like and the ones that you don't. Think about why.

Begin to evaluate what you think works and doesn't work for each. Which draw you in? Which compel you to take some type of action, and why? For each marketing communication piece that attracts your attention, either positively or negatively, attempt to evaluate its communication strategy and effectiveness by asking the following questions:

- ◆ What is the organization's or program's mission statement?
- ◆ Who is the target audience?
- ◆ What is their positioning statement?
- ◆ Is there a strong headline?
- ◆ Is there a "call to action"?
- ◆ What are the key features of the program, product, or service?
- ◆ What are the expressed benefits to the target audience?
- ◆ How do the graphics complement and accentuate the message?

Worksheet 7 in Appendix B is a template that can help you develop a positioning statement for your program.

## **Developing Your Message**

Up to now, the groundwork has been laid in preparation for developing your message. You have a deeper understanding of who your target audience is and the image you wish to convey. As suggested in the introduction of Part II, completing a marketing communications worksheet will aid you in creating an effective message. This worksheet allows you to clarify your current communications objective, and to describe your target audience, your positioning statement, features of your program, and key benefits to prospective mentors. Once complete, it is time to start writing.

We also suggested checking out what other organizations and programs are doing in their recruitment efforts. This would be a good time to review their brochures, ads, Web pages, and other communication materials and lay them out in front of you (or your copywriter). Discuss any particular elements you want to include in your own message.

The structure of your message development team will likely determine how the writing is done. If your creative team is composed of staff and board members only, you may initially

choose to brainstorm words, key concepts, phrases, and/or program slogans you like. However, this should be used only to get the “juices” flowing and to provide general creative direction. The designated copywriter should then draft the actual message. If a professional copywriter is being used, the actual process may be dictated by what works best for that person. She may wish to meet the entire team and gather input in a group environment, or meet with the project manager and receive information one-on-one before beginning the actual writing project.

In either scenario, it is common practice to develop multiple creative concepts in the initial round of writing. Even though you have developed clear objectives and set some desired guidelines, message development allows creativity to wander in many directions. Any concepts developed should be evaluated against the guidelines you developed within your marketing communications worksheet.

Message development is an iterative process. Once you are comfortable that you have at least a couple of solid concepts, it is time to check them out with your target audience. While discussed separately in the next section, conducting some type of “research” to test your message with your target audience can be valuable and is really the only way you can clearly gauge your message’s real effectiveness. Skipping *any* testing can lead to less-than-effective messages that don’t deliver the results you want, which can cost more in time and resources in the long run.

### **Elements of Effective Messages**

Today, any message meant for public consumption must “break through the clutter” of the overwhelming multitude of competing messages that people are bombarded with every day. Your message needs to capture the attention of your target audience and stand out in the crowd. And once noticed, it must be able to effectively persuade your target audience to take the action you want from them.

It is not always possible to separate the visual, auditory, and other sensory contexts from the message itself. In fact, it is common for the content (words) and graphics to be developed in unison. Still, it is useful to place a singular focus on carefully choosing the best words. Words by themselves have great power and influence, as it is the words that communicate your message. Any graphics or other sensory contexts should support and accentuate the text of your message.

Following are a number of tips (mostly applicable to print media) for creating appealing messages:

### ***Write good headlines***

Headlines are usually presented in larger and bolder type, and often are the only part of your text that will be read. Headlines are critical for drawing your reader's attention and, you hope, will intrigue them enough to look more closely at the smaller print in your message. Headlines work best when they state a benefit, arouse interest, or break news (Goodman, 2002). Your headline should play off and balance any illustrations used.

### ***Include a call to action***

Making a clear and strong call to action within your message helps your target audience know what you want them to do. Clearly state what you want them to do and what is involved in doing it—in this case, becoming a mentor. Also, be sure to invite them to contact you somewhere within your message.

### ***Be inviting and compelling***

Attempt to make your message as strong and interesting as possible. Let your “positioning statement” come to life and be expressed. Be passionate but upbeat. Show what is unique about your program and what you do better than anyone else. Think in terms of building your brand. Consider telling them what will happen if they don't call you—kids that need help will not be served and your waiting list will grow.

### ***Keep it simple***

Use everyday language. Other than your headline and slogan, try to write the way you would talk to someone. Reading your message out loud may help you keep it simple. Simplicity allows your target audience to readily remember the key points and focus on what you want them to do. Be concise and don't reiterate key points unnecessarily.

### ***Highlight program features***

Briefly and positively describe the key features of your program, its mission, and expected benefits to the youth you serve. Clarify what you are trying to accomplish and why it is important.

### ***Emphasize benefits to target audience***

Get to the point: What's in it for them? Keep the number of benefits you communicate to three or less; don't create laundry lists of benefits. If your print space or air time is very limited, keep it to one key benefit. That will maximize the impact and effectiveness of your message. This is another area of marketing communications where less is more.

### ***Use facts and testimonials***

Facts about the effectiveness of mentoring can support your message. However, overusing statistics can hinder your efforts; they can become uninteresting and boring. Personalize facts to your local community if you can. Using testimonials from current mentors, youth, and parents is effective in making the message personal and convincing. Be sure to get permission for any quotes (and photos) you use.

### ***Consistently promote your “brand”***

Your program name, slogan, and logo should be included prominently in your message and layout. Developing these important communication components and treating them consistently across communication contexts will help you build brand equity.

### ***Organize your content well***

The content of your message should flow smoothly and work well with the graphics you choose. Start with your headline and carefully prioritize other content to be included depending on the space you have to work with.

### ***Include your contact information***

You’d be surprised how many times this gets overlooked. Be sure to tell readers how to contact you. Include your program name, street address, phone number, e-mail address, and Web site address. Make sure this information is easy to find, but don’t let it overrun your message, either.

## **Testing Your Message**

*“The most important word in the vocabulary of advertising is TEST. If you pretest your product with consumers, and pretest your advertising [messages], you will do well in the marketplace... Never stop testing, and your advertising [marketing] will never stop improving.”*  
—David Ogilvy, Advertising Executive

Testing is the one clear path to knowing if your marketing communications actually work—whether or not they really say and do what you want them to. Because marketing communications are subjective, they are difficult to evaluate. Once you become personally involved in the development process of creating marketing communications, it is difficult to be objective about your own work. And, if you are not part of the target group, you will likely perceive and respond to a message differently than if you were part of that particular audience. While staff and board members provide valuable input into the development of messages, no one can better tell you about their real effectiveness than your target audience of mentors.

## **K E Y   C O N C E P T :**

**You should test, revise, and retest until you feel your message is conveying what you want it to and it is generating the response you are seeking.**  
**When members of your target audience tell you they like your message and that your message says and does what you want it to, you are done.**

Testing doesn't need to be elaborate and you don't have to recruit a large number of participants; it can be a smaller, more informal process. One of two simple approaches are suggested: one-on-one interviews or small-group discussions. It is ideal to survey prospective mentors not very familiar with your program. However, it is more important that you are reaching the right target audience. To that end, it may be more efficient to use current mentors who may be more easily found and approached. Do what is convenient, but keep in mind that your research needs to be kept as objective as possible. When conducting your research attempt to do so in a quiet and private setting.

To get the greatest benefit from your testing efforts, it is best to mock up a message in its planned context (brochure, advertisement, flyer, etc.) and include your logo, slogan, and any graphics before testing. However, testing can be done on any aspect of message development including the message itself, a complete communication piece such as a brochure, or on the graphics alone. Any feedback received is digested, evaluated, and used to revise and improve your communications before their final delivery. And, it may take multiple iterations of testing to fine-tune your communications.

Worksheet 14 provides sample questions to use in conducting your own testing about your marketing communications. These questions are meant only as a guide. You will likely want to modify and adjust your questions as you go along in order to gather the most useful information for your needs.

## **Crafting Consistency Into Your Message**

*“I didn't have time to write a short letter, so I wrote a long one instead.”*

—Mark Twain

If you are in the start-up phase, your first communication objectives may be to develop a program slogan, headline, and a concise, focused message of appeal about your program on a simple flyer. These then become core messages to be used consistently and/or expanded upon in subsequent, more complex projects, such as a brochure, Web site, or PowerPoint presentation. It is important to make sure your slogan, “core” message, positioning statement, key program components, and participant benefits are communicated consistently across all your marketing materials.

At some point, you will need additional versions of your message for other specific contexts and uses. Thinking ahead, create messages of varying lengths and complexity around the same themes. These will help ensure message integrity no matter how it is being used. These versions will be available when you need them for last-minute purposes such as a publicity opportunity or special advertising placement. Having a number of versions on hand allows for quick responsiveness and flexibility. The following table depicts common types and lengths of messages that you may be asked to provide for various publicity purposes.

## Common Types of Consistent Messages

Types of Messages	Description
Program slogan	<ul style="list-style-type: none"> <li>• Catchy phrase used to build brand recognition across media.</li> <li>• Used consistently across various media and over longer timeframe.</li> </ul>
Headline	<ul style="list-style-type: none"> <li>• Incorporates main point, and is used to get attention and draw readers in.</li> <li>• Used consistently across various media for a period of time.</li> </ul>
Core Messages (various lengths): <ul style="list-style-type: none"> <li>• 25 words</li> <li>• 50 words</li> <li>• 100 words</li> <li>• Program story (1–2 pages)</li> </ul>	<ul style="list-style-type: none"> <li>• Message about your program that conveys why your program is important, how you want readers to feel, and what you want them to do.</li> <li>• Message changes with medium used; core content remains consistent.</li> </ul>

## Chapter 3: Delivering Your Recruitment Message

*“The best recruiters available to you are satisfied volunteers who tell others about their work, encouraging participation and commitment.”*  
—Sue Vineyard

Maximizing personal communications and building personal relationships with targeted youth, mentors, parents, school staff, board members, media professionals, and other community members is critical. However, personal contact is not the entire answer. In order to reach the number of people you need to make your program successful, you must use more efficient means of communicating with *large* numbers of people.

You likely have a limited budget and human resources to implement your marketing plan and deliver your message. You will need to reach your target audience frequently, and will likely use a number of communication vehicles to connect with them. The following sections discuss how and when to effectively and efficiently deliver messages to your prospective mentors.

### Impressions Count

Reaching the right people, at the right time and in sufficient numbers, is at the heart of effectively delivering your message. But just reaching them isn't enough. People do not usually hear what is being said the first time they encounter a new message. It can take at least three “impressions,” or exposures to a message, before a person becomes aware of a program, product, or service. It may then take even more impressions before they take any action, if at all.

Building *awareness*, *trial*, and *repeat* of products and services are key goals for many marketers. Generating “awareness” of a program is self-explanatory. “Trial” generally refers to getting your target audience to try a product or service. For mentoring programs, trial refers to prospective mentors taking action to either inquire about or apply to be a mentor. “Repeat” refers to getting the target audience to take the same action a second, third, or more times. Repeat is less relevant to mentor recruitment as once matched with a youth a mentor generally stays in the program for a period of time, creating little need to reapply or be rematched.

### Reach and Frequency

Desired awareness, trial, and repeat levels are often set and achieved by enhancing two key communications measures: *reach* and *frequency*. Reach refers to the number of people your message makes contact with while frequency has to do with the number of times each person is reached. Reach and frequency are often intentionally managed through well-defined and deliberate marketing efforts.

Together, reach and frequency comprise a simple multiplication formula for building your total number of *impressions*, or the total number of times your message connects with people:

## K E Y   C O N C E P T :

**Reach x Frequency = Total Number of Impressions**

However, it is less important to think in terms of a defined formula than to remember the general mechanics that delivering your message is a *numbers game* of building and maximizing impressions:

- ◆ You must *reach* many more members of your target audience, in this case prospective mentors, than stated in your mentor recruitment goal. Not everyone you reach is interested in becoming a mentor and some that are interested may not be available at a given time—so you must reach many more prospective mentors than you need.
- ◆ You must deliver your message *frequently*. You must reach your target audience a number of times and keep communicating with them. Once they are aware of you and if they become interested, you must continue to communicate with them until they are available to volunteer, which may not be immediately.

Deliver your message frequently to as many target mentors as you can effectively afford to reach. Don't assume because you gave someone a brochure that they read it, or if you posted a flyer that anyone noticed it the first time they saw it. Don't assume because you told one person in an organization, school, or business about your program, that they fully grasped the concept of your program, or what you were asking for, or that they passed the word on to others.

## Choosing Your Media Mix

*“The question confronting the Church today is not any longer whether the man in the street can grasp a religious message, but how to employ the communications media so as to let him have the full impact of the Gospel message.”*

—Pope John Paul II

Choosing from among the many options for communicating with your prospective mentors is both an important part of marketing communications and marketing planning. These message delivery options are called *media* or *vehicles*. This section discusses how to uncover and choose from among the various media options available to you. You will likely use a number of communication vehicles to deliver your message and the particular blend of vehicles you choose to communicate about your program is called a “media mix.”

## **Message Delivery Options**

Following is an extensive, but not exhaustive, list of communication delivery options, marking a place to start in your media planning efforts. There are limitless possibilities in finding new delivery methods or adding more creative flair to existing options.

### **Message Delivery Options**

<b>Media Categories</b>	<b>Message Delivery Options</b>	
Promotional Materials/ Environment	Brochures Flyers/Posters CDs Videos Program newsletters Letterhead Business cards Events/Booths	Web site Office signage T-shirts and other clothing Bumper stickers Lapel pins Annual report Office environment
Personal Contact/Relationship Marketing	Personal networking Presentations	Approaching organizations Orientation sessions
Public Relations	Press releases Media interviews Public Service Announcements Editorials & Op-Ed Published articles	Backgrounders Fact sheets News conference Talk shows
Advertising	Newspapers Newsletters (ads) Magazines Billboards Transit ads	Internet ads Direct mail E-mail Broadcast fax Telemarketing

Each of the four categories in the table above is discussed in subsequent sections of this chapter. While it is beyond the scope of this guide to cover each communication vehicle in specific detail, there are numerous resources both online and in print that can provide you with more information.

## **Choosing Your Media**

Making media decisions starts with uncovering all the options available to you in your local area. This may require brainstorming with your program staff and other stakeholders, such as your board of directors, as well as scanning your local community for opportunities. You

will want to explore delivery options that best fit with your objectives, target audience, program design, and budget. You will likely find there are many more avenues available to you than you first thought.

As you determine and evaluate media options in your local community, thinking in terms of “must haves” and “nice to haves” for your specific recruitment goals is a useful way to begin prioritizing them. Some media will be highly targeted to one particular audience and will generally reach smaller numbers of people. Other media may reach a number of target audiences simultaneously, or cover the general population.

The time to seriously evaluate your delivery options for the coming year is during the development of your marketing plan. You will want to reflect your media choices within your marketing plan. Following are a number of factors to consider when making media choices for your program:

### **Target Audience**

Carefully choosing and thoroughly understanding your target audience will greatly influence the vehicles you choose. If you are targeting special populations such as African American adults, retired citizens, or college students, it will obviously take quite different means to clearly penetrate these audiences. Keeping in mind that personal contact needs to be a key component of your plan, making contact to specific *organizations* that serve these groups is a good starting place. These organizations may have newsletters, bulletin boards, meetings, events, and other means for you to deliver a targeted message to these groups.

When trying to reach a broader group of people, such as men and women aged 29–40, for example, you will want to explore broader communication avenues. Approaching large local employers and community organizations, having booths at community events, or placing advertisements with the local newspaper or radio stations are all options you may want to look at to reach this broader audience.

### **Media Budget**

Many media delivery options require a financial investment and you most likely have a limited budget, making this factor a key one in your media selection. These media costs can comprise a substantial portion of your marketing budget. Marketing communications budgets are often broken into *production* and *insertion* costs. A production budget may include the cost of your time in developing marketing communications, any charges for using a professional writer or graphic designer, and other costs for paper, printing, and distribution. Insertion costs are generally associated with advertising where you purchase space or time to place your message in. You will want to make sure all costs associated with any particular delivery option are fully identified before incorporating them into your marketing plan. Narrowing the selection to what is affordable is a common challenge.

Worksheet 15 in Appendix B is a marketing communications budget worksheet for detailing the costs of developing and delivering various communications options. The totals from this worksheet can then be folded into Worksheet 10, the Marketing Plan Budget Summary.

### **Editorial Environment**

When choosing a particular medium, you will want to consider its overall environment and editorial content. For example, environment can impact choosing which bulletin boards to place flyers on in your community. Some bulletin boards attract politically-oriented messages or particular target audiences, which may or may not work well for your program. Others may be quite popular, but so busy your flyer may get lost in the shuffle. Likewise, ask when and where your advertisement will be placed within a publication, on air, or in the community (billboards, bus benches, or buses). You can often pay extra for a “preferred placement.” And, you may wish to advertise within only certain issues of a publication because they are focusing on a theme that relates to your program’s mission. Ask publications for their editorial calendar during your planning process.

### **Continuity**

Be sure to build “frequency” into your communication planning, meaning you want to extend the delivery of your message to your target audience over time. While there may be periods of time where heavier communications are appropriate, you want to have some level of “coverage” throughout the year. For example, if you are a school-based program, you will likely want to start recruiting more heavily in the previous spring and summer so as to have matches made early in the next school year. You will likely need to maintain some level of communication activities throughout the year. Toward the end of the school year, you will want to step up your media activity again in preparation for the next year’s recruitment efforts.

### **Versatility**

Versatility means a medium is able to reach more than one target audience or serve more than one objective simultaneously. For example, a brochure is often considered a foundational marketing piece for mentoring programs and one of the first communication pieces that needs to be developed. It can be used both as a recruitment tool and also as a means for building general awareness of your program, which may contribute to new funding sources down the road. A brochure can also be mailed, left in display holders in various locations, provided as a leave-behind at a presentation and, if done carefully, used to communicate with multiple target audiences. When building versatility into your communications, be sure to prioritize which objectives you want to achieve and keep your content focused.

### **Special Opportunities**

It is practical to retain a small reserve of funds in your marketing plan budget for special communication or publicity opportunities that may come up during the year. Also, it is helpful when building your marketing plan to keep in mind what you might give up if better opportunities arise during the year.

## Promotional Materials

You will most likely utilize a variety of promotional materials as you embark on marketing your mentoring program. Promotional materials cover a broad category of printed and specialty items that can be used to communicate about or publicize your program. Often these items are developed for the simple purpose of creating excitement about a program. They are also an effective means of building awareness and a strong brand image.

Nearly all promotional materials such as flyers, posters, CDs, Web sites, bumper stickers, etc., can be utilized for a variety of purposes. While they may be used in a highly targeted way (such as for mentor recruitment), they are usually quite versatile in their ability to be used for other program objectives or target audiences. For example, letterhead and business cards are suitable for a variety of marketing and other business uses. A Web site can be used to disseminate information to prospective mentors, parents, youth, school staff, and prospective funding sources.

As you are starting your program, make a few selective choices that will give you the most mileage, given your budget. A simple program brochure and flyers are among the most common promotional items to start with. As your program evolves, you may wish to purchase T-shirts, pins, or bumper stickers or create more sophisticated materials such as CDs, videos, newsletters, and annual reports.

Regardless of the type of promotional materials you use and depending on the space you have to work with, you will want to consistently communicate a few key components of your program. Namely, you want to make sure your program name, logo, and slogan are visible and treated uniformly across all items. This means using consistent fonts, colors, and placement wherever possible. Be sure to include contact information for your program, particularly a phone number and e-mail address, so people can easily connect with you. Adding additional information about key features and benefits of your program depends on the overall space and type of media being used.

There are usually a number of businesses in any area that specialize in promotional items, such as pens, pins, bumper stickers, etc. Searching online should provide numerous resources as well. Pricing can vary greatly across items, but you should be able to find some suitable items for your purposes at an affordable cost.

## Personal Contact

*“Advertising is what you do when you can’t go see somebody. That’s all it is.”*

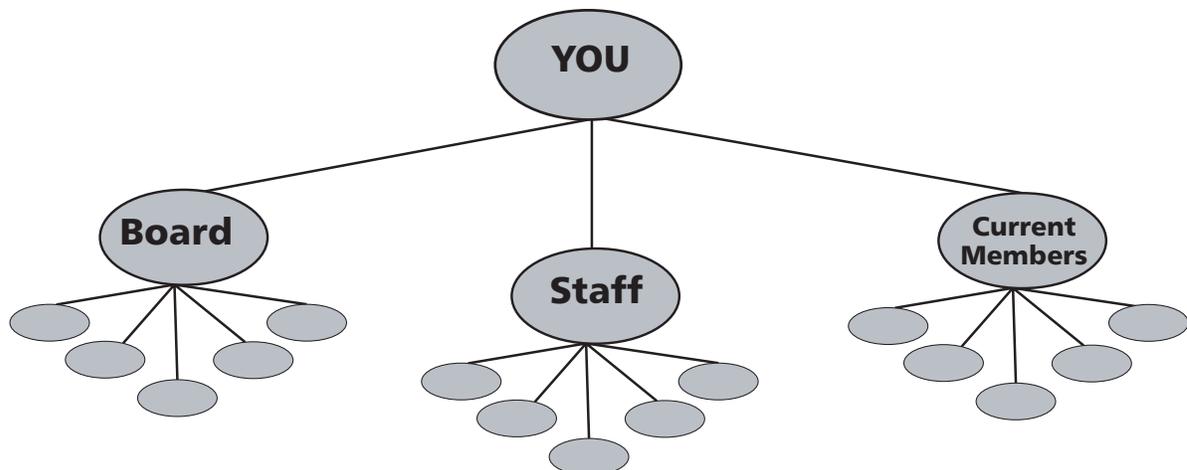
—Fairfax Cone, Advertising Executive

There is great power in face-to-face, personal communication. People respond more positively and engage more enthusiastically from having made personal contact than by looking at a brochure, reading an ad, or viewing your Web site. When communicating, the more personal the process, the easier it is to build rapport and make your audience feel connected to your program. In essence, personal contact allows you to more effectively build the critical relationships you need for your program’s success.

Build word-of-mouth strategies into your marketing plan, either via one-on-one opportunities or by addressing groups. You must get out into your community and talk to people personally. Over the long term, reaching people on a personal level and building relationships has proven its effectiveness. Strong relationships are key to building positive perceptions and a program image.

Many people volunteer in response to a direct request of a friend, co-worker, or acquaintance. Ask others who have a vested commitment to your program—staff, board members, and current mentors—to tell the people in their lives about your program. Leveraging your connections in this way can create a “multiplier effect,” which can greatly benefit your program. To begin building this type of volunteer network, you will need to evaluate your own program and agency to determine the most natural networks available to you.

The following diagram shows three potential groups you can utilize. Others include school and district staff, neighborhood associations, church groups, service organizations, mentor applicants that for some reason couldn’t become mentors, etc. Visualize this diagram with additional levels of circles. Your recruitment network has potential to become quite large. Over time, word spreads by itself from one person to another.



As you get others to help in recruitment efforts, be sure you build “quality control” into the message they are *all* delivering. By keeping your message simple and strong, and clearly communicating and training others to communicate about your program, you will help ensure everyone is “singing the same song.” This will help you create a stronger presence throughout your community and build your brand more effectively.

### **Getting Mentors Involved**

Current mentors are powerful recruiters. Often, as a mentoring program grows and matures, mentors become the single most effective means of recruiting new mentors. Your current mentors are likely to have friends with similar interests and values, and can offer the best testimonials for recruiting new mentors. Happy and successful mentors are proof of the benefits of mentoring, and prospective mentors really want to hear up front that it is a rewarding, enjoyable, and doable experience. Ask them for their help and use them in your recruitment efforts whenever possible.

Build mentor-to-mentor recruitment strategies into your marketing plan. A few ways you can get your mentors involved include:

- ◆ Inviting them to speak at mentor orientation and training sessions for prospective and new mentors
- ◆ Directly asking them to inform and invite their friends and associates to become mentors
- ◆ Training and coaching them on what to say about the program and how to approach others
- ◆ Providing recognition and/or awards to mentors who successfully recruit new mentors
- ◆ Contacting appropriate people at their places of work and other organizations they are affiliated with
- ◆ Getting quotes from them to put in your promotional communications
- ◆ Asking them for ideas as to how they can help with recruitment
- ◆ Inviting them to be involved in your fund-raising events

### **Approaching Organizations**

Another solid recruitment strategy worth pursuing is targeting various organizations in your community. Organizations are often made up of many like-minded individuals and offer an efficient opportunity to recruit mentors by being able to reach many individuals in a single effort. Approaching organizations offers the same great value that comes with any face-to-face contact—personal interaction and the opportunity to build relationships.

Finding the best organizations to approach in your community may take some searching, but can be well worth the effort. Usually, a few conversations with people you know, other staff, and board members can turn up a solid list. Contacting your local chamber of commerce and extension service, and looking in the phone book and online, are all good sources to compile a list of possibilities. Evaluate which organizations best fit with your objectives and desired target audience. The following table gives you some ideas of types of groups that exist in most communities.

Local Organizations	Work-Based Organizations	National Organizations
Community-based nonprofits Civic clubs Advocacy groups Service groups Professional/trade associations Faith-based organizations Neighborhood associations Block clubs Volunteer centers Community centers	Businesses and corporations Utility companies Government departments: <ul style="list-style-type: none"> <li>• Police and fire departments</li> <li>• City, county, state, federal offices</li> <li>• Military</li> </ul> Retailers Restaurants Professional offices	AARP Urban Leagues Fraternal groups Sororities

When approaching organizations, finding a way “in” is a common challenge. Ask key stakeholders of your program, especially board members and current mentors, who they know in each targeted organization. Have them facilitate or assist in making contact with the organization (such as attending a meeting or presentation with you). But don’t be afraid to approach an organization on your own. It may take a few phone calls to get inside an organization and find someone who can assist you. But once you are “in,” you can ask for a face-to-face meeting and make your pitch.

When an organization invites you to meet with them or make a presentation to a group, always be well prepared and present your program professionally. Be clear about what information you want to present and make a clear request for what you would like them to do. Determine what their interests are and when you can talk with them again. Have information with you to leave behind. Be sure to thank them for the meeting and then promptly follow up on any requests they have for additional information.

## Public Relations

*Public relations*, often called “PR,” is a specialized function of marketing and an important means for gaining publicity. PR involves getting the attention and interest of media professionals who work for newspapers, magazines, and radio and TV stations. When doing PR, your messages are developed in particular formats and must go through news reporters, editors, and other media staff, who in turn decide whether they will use your information, how much of it they will use, and in what way. The benefit is that you may receive significant *free* publicity for your program.

Public relations has strong advantages but also some disadvantages. The overarching advantage is that it is possible to get a lead story printed or aired about your program at essentially no cost. Because nonprofit budgets are often very limited, public relations is an important marketing tool. The disadvantages or risks of PR are that there are no guarantees as to amount, timing, or placement of any coverage you receive. Short of creating a tape or video, you have minimal control over how much is printed or aired, if anything at all. Because many organizations—both for-profit and nonprofit—are vying for free publicity, you may prepare and distribute numerous press releases or public service announcements before seeing any results from your efforts. The opportunities and risks of undertaking public relations are illustrated in the table below.

### Advantages and Disadvantages of Public Relations

Advantages	Disadvantages
<ul style="list-style-type: none"> <li>• Opportunity to obtain free publicity, especially a lead story</li> <li>• Few hard costs beyond time, paper, fax machine or postage, and a phone</li> <li>• Well-developed media relationships increase your opportunity for coverage</li> </ul>	<ul style="list-style-type: none"> <li>• Minimal to no control over amount, timing, or placement of any coverage</li> <li>• Takes time and effort to establish and build necessary media relationships</li> </ul>

### Building Media Relationships

Establishing and building strong media relationships is essential to successful public relations. Making personal contact with the media is essential. While you may not have final control over what is printed or aired, having positive relationships with media professionals will enhance your chances of getting good coverage when you want it. Building relationships takes time and requires making regular connections. Get to know them and let them get to know you. Whenever possible, make contact and build relationships with media editors or directors, even if they insist you work through others in their organizations. All these connections must be purposeful, targeted, and ongoing.

Being proactive and frequent in your public relations efforts will help keep others aware of your program. When submitting media messages, always follow up with a personal call—each time—to ensure the targeted person received your piece. Remind them of the importance of your program’s work in the community. This is called “pitching” your message. Otherwise, your message can easily be lost in a large stack of press releases and other news announcements received daily in any busy news center.

Be considerate in understanding the scope and challenges of media professionals. You want to be continuously searching for prime news opportunities, but take care not to be a pest. Making contact too often can become annoying and result in media professionals avoiding you and your program. Media people often work under tight timelines; getting materials to them on time and in easy-to-digest formats is essential. Use clear language, be truthful about your program and organization, and avoid using terminology specific to mentoring or your organization. And, be sure to formally thank them for their time whenever you make contact and especially if they provide *any* coverage for you.

### **Public Relations Options**

As shown in the table on page 57, there are a number of PR options. Regardless of the medium being used, it is imperative that your message be newsworthy, clear, well developed, and able to grab the media’s attention.

The following are brief descriptions of some common public relations vehicles. Use as many of these as possible that fit your program. Programs just starting out may need to be selective in their choices. As programs mature, there is often greater capacity to utilize a wide breadth of public relations activities. Media staff are familiar with these formats and know how to make use of them.

#### ***Press Releases***

Also called news releases, press releases are one of the most common media tools. They can be effectively used to inform your community about your program’s successes and achievements, and to announce upcoming events, fundraisers, and classes. While a press release may be reprinted in its entirety, it is common for only excerpts to be used. You will want to schedule newsworthy releases to be distributed to your local media throughout the year. Usually only one or two pages in length, press releases are written in an inverted pyramid style—meaning it should have a strong lead sentence that draws the reader in with leading information in the top paragraphs, and then transitions down the page into the less important details of your news. Be sure to include a “call to action” in all your releases.

#### ***Public Service Announcements (PSAs)***

A PSA is another commonly used PR tool. PSAs are targeted to local radio and television stations, which are required by law to air messages for nonprofit organizations. Contact local stations to learn how each station complies with this requirement and how you can best work with them to get your message aired. In most cases, you will have less than 60

seconds to get your message across. Choose your message well, strongly considering the medium's delivery and your target audience.

### ***Media Interviews***

While more difficult to garner, attaining a personal interview is a key goal of public relations efforts. An overriding purpose of PR is to garner a newsperson's attention that will lead to a *personal interview* and generate a large feature story, on-air interview, or guest appearance. This is where having a clearly determined core message and effective spokesperson for your program is crucial. These opportunities often come up unexpectedly and at the last moment. You must be ready for them. Prepare by talking to the interviewer in advance to determine what they are interested in and the direction they want to go with the story. Help them ask knowledgeable questions at the time of the actual interview.

### ***Editorial Opportunities***

There are a number of editorial opportunities your program can pursue. Letters to the editor are effective for attracting attention to your program; however, it is best to have non-staff persons, such as board members, mentors, or parents, write them. The page opposite editorials, called "Op-Ed," provides noticeable placement for articles with social-type messages. You may also be able to gain placement on the Op-Ed page or elsewhere for a regular weekly or monthly column or article; this is usually gained by talking with and building relationships with the publication's various editors and finding out what is of current interest to their readers.

### ***Fact Sheets and Backgrounders***

Fact sheets are similar to press releases. Rather than being written in press release style, you present the facts about your program or story in a well-organized manner and let the reporter or writer develop the story themselves. Backgrounders do what the word suggests—provide a more detailed background, either of your program or current news story beyond your press release or PSA.

### ***Success Stories***

These stories allow you to express your program's success in achieving its mission. This might include a profile of a match, an overview showing strong growth in matches or outcome results for the youth in your program, or a review of funding streams your program has been able to increase over time.

### ***Press Events***

Usually scheduled infrequently, you may choose to hold a press event or conference for major news stories. These may include milestones such as significant leadership and visionary changes, program expansions, major funding news, important public events, big anniversary dates, etc. You will want to make sure your event is well organized, and has a clear message, and that the key stakeholders for your organization are present and prepared.

### **Press Kit**

Many organizations create a press kit for their organization or particular programs. A press kit includes the current press release and can include any number of relevant and corresponding information that will present your program in the most positive light: brochure, logos, fact sheet, backgrounder, success stories, program history, relevant pictures of matches, staff, board members or your offices, list of board members and their respective positions, major donors, etc. Press kits are handy to have when introducing yourself to new media contacts or to have at major events. They are also fun to redistribute occasionally when you revamp and update your materials, giving your program a fresh new look.

## **Advertising**

Advertising is a widespread marketing tool for most for-profit and many nonprofit organizations. Advertising varies from public relations in some significant ways, namely that all advertising comes with a price tag. However, advertising also has some significant advantages that make it cost effective for the many organizations that utilize this powerful medium, mostly due to the large number of people that can be reached in a single effort.

Essentially, advertising involves paying for space or air time that you can then place your message into such as newspapers, newsletters, magazines, Web sites, television, or radio. The cost of that space can vary greatly, and can often be quite expensive. In general, print advertising and local coverage are less expensive on a cost-per-person-reached basis than that of radio, television, and national delivery vehicles. While it may be expensive, once you have purchased your space, you have almost *complete control* of the message you place there.

### **Advantages and Disadvantages of Advertising**

<b>Advantages</b>	<b>Disadvantages</b>
<ul style="list-style-type: none"><li>• Guaranteed delivery of your message when and where contracted for</li><li>• Can reach large numbers of people</li><li>• Considerable control over quality of the message delivered</li><li>• Highly targeted vehicles are available to reach specific groups of people</li></ul>	<ul style="list-style-type: none"><li>• Purchasing space or air time can be expensive</li><li>• There may be additional costs for specific placement or timing</li><li>• Limited budgets often limit the ability to effectively build “frequency” in message delivery</li></ul>

## Making Advertising Choices

Generally, when undertaking any advertising efforts, two key factors will influence your choices: cost and target audience coverage. Most widely circulated publications and radio or television stations should be able to provide you with a *rate sheet* including demographic information about their readers or viewers. You will want to gather this information from as many sources as are available to you before making any decisions to buy media.

Developing a simple spreadsheet of media options can help you compare costs.

Still, looking at costs is only one factor in making good media choices. Considering how well a vehicle's demographics fit with your own target audience demographics is equally critical. There is no point if you aren't reaching the right people. Also, consider the editorial content of the vehicle itself. Does it fit well with your program's mission and youth outcome objectives? What is the reputation of the publication in your community; does it fit with the desired positioning of your program? Will it help you build a positive image by being associated with it? And, will it get the results you desire?

When making a media buy, use rate cards as a guide but always attempt to negotiate a better rate. Buying multiple insertions in a given timeframe such as a year is less expensive per insertion. Often publications are hungry for business and will offer a better deal than originally stated to sell you space. Keeping in touch with media sales representatives will help them remember to tell you about specials they may have at particular times throughout the year. Of course, it may be possible to obtain nonprofit rates or even in-kind donations of ad space. This may come from the equity built into your media relationships or from other connections your board members and other program stakeholders may have.

## Post-Buy Considerations

Make sure you are aware of all deadlines and technical requirements for placing your ad. Publications often work on tight timelines and will not allow late materials; you can be charged for the space regardless of getting your materials in on time. A common cause of difficulty in providing materials is delivering the right technical format. There are several commonly used software programs for developing ads that are incompatible with each other. Also, many creative publications departments use Macintosh computers while others use PCs. Determine what their technical needs are and how to accommodate their technical specifications. If not, the publisher may lay your ad out *for you*—at an additional cost.

## **Design Elements**

The messages you choose about your program are fundamental to its success. Where and how you deliver those messages can elicit zeal or indifference from your target audience. The visual context of your message can work with or against your purposes. We've all seen brochures and advertisements that, by their accompanying visual presentation, have swept us deeper into the message, repelled us, or thrown us into a reality quite different from

the intended message. Often, we are not even conscious of this process. The message is key; your delivery vehicles and design elements need to support your message's effectiveness. The goal is to make them work together to enhance the effectiveness of your message.

### **Design Basics**

Laying out a basic brochure of information about your program may seem a simple task. However, those attempting to embark on the design and layout of such a project may quickly find themselves in a quagmire of questions about how much information to include, where things should go, what sizes and fonts to use, and where to add pictures or graphics (and how many), and in what order everything should be placed. It is at this stage that you realize how handy it is to have your message already developed! Trying to create your message and design at the same time can lead to confusion.

The following basic elements can help you create more effective design environments for your marketing communications. There are a number of design models and many more design elements that you can study and become familiar with. Terms you may come across include color, line, mass, movement, space, texture, type, value, contrast, repetition, alignment, proximity, simplicity, balance, consistency, contrast, and white space. The following list is certainly not exhaustive, but it offers some simple yet universal concepts for developing or evaluating a design's effectiveness. As mentioned earlier in Chapter 2, testing your design with your target audience is the best way to know what works. When in doubt about any element, keep it simple. Always think in terms of your positioning statement and what you want to portray.

#### ***Headline***

Depending on what is being developed—a brochure, flyer, or advertisement—you will want to make sure it has a headline. Headlines are used to draw attention, should be in bold type, and at the top or beginning of your communication piece. Having a call to action in your headline is a good way to make a direct invitation to prospective mentors.

#### ***Organization of Information***

Be clear about who the piece being developed is meant to *talk to* and make sure that this is the audience you are talking to throughout the production. Categorize the information, if possible, under subheadings and prioritize your message points. For example, you may want to talk about the mission of the program in one area, the benefits to client youth in another section, the benefits of being a mentor in another section, and eligibility criteria and how to contact your program in yet another.

#### ***Organization of Space***

Consider where information should be placed. You may have to make trade-offs between how much information you can include and allow for breathing room or what is called white space. Often, more attention is obtained by the space around a piece of information rather than by filling a page with more information.

### ***Pictures***

Pictures and other illustrations can effectively say a thousand words. Having pictures of youth or match pairs can draw people in to find out more about your program. Pictures are also effective in creating the tonality you desire, be it friendly, fun, sincere, or whatever. Be sure your pictures are representative of your target audience and that you have acquired necessary permissions to print them.

### ***Graphics***

As with pictures, graphics can support or detract immensely from your project. Choose them with care, making sure they complement but don't distract or detract from your message. If you are unable to solicit the aid of a design professional, lean toward keeping graphics simple.

### ***Color***

If color is an option, be sure not to overdo it. Too bright, too many colors, too much contrast, too many shades, can all be distracting or just plain repelling to viewers. Pick a well-contrasted and simple color scheme and stick to it. If you are using only black type but colored paper, pick light to medium shades that keep the focus on your information and aren't glaring, distracting, or difficult to read.

### ***Fonts***

Use easily readable fonts, in a large enough type size to make reading comfortable and easy. Don't use more than two or three fonts in any one brochure, flyer, or advertisement. And use consistent fonts across the various marketing pieces you produce including type on your logo and/or slogan.

### ***Contact and Program Identification***

Provide a clear area for your program name, address, and other contact information. For multiple-page brochures, you may include this information in more than one place. Also, be sure to include your program logo and/or slogan if you have them in all marketing communications; placement of these should be kept as consistent as possible across your marketing communications as they strongly contribute to the branding of your program. However, repeating this information on every page or every panel can be distracting and is not a wise use of space.

## Marketing Communications Resources

### Print:

Ellis, S. (2002). *The volunteer recruitment and membership development book* (3rd ed.). Philadelphia, PA: Energize, Inc.

Garringer, M. (2002). Web development for mentor programs. *National Mentoring Center Bulletin*, No. 9. Retrieved June 6th, 2004, from [www.nwrel.org/mentoring/pdf/bull9.pdf](http://www.nwrel.org/mentoring/pdf/bull9.pdf)

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Stern, G. (2001). *Marketing workbook for nonprofit organizations. Vol. II: Mobilize people for marketing success*. St. Paul, MN: Amherst H. Wilder Foundation.

**Web:**

*Creating Effective Newsletters, Flyers, and More*, Senior Corps Tech Center

[http://seniortechcenter.org/learning\\_paths/marketing/start\\_lesson/creating\\_effect\\_news.php](http://seniortechcenter.org/learning_paths/marketing/start_lesson/creating_effect_news.php)

Publicity Articles, Pertinent Information Web site

[www.pertinent.com/articles/publicity/index.asp](http://www.pertinent.com/articles/publicity/index.asp)

*Writing Press Releases*, Senior Corps Tech Center

[http://seniortechcenter.org/learning\\_paths/marketing/tips\\_tools\\_and\\_templates/writing\\_press\\_releases.php](http://seniortechcenter.org/learning_paths/marketing/tips_tools_and_templates/writing_press_releases.php)

## References

Costa, A., & Kallick, B. (2000). *Describing sixteen habits of mind* [On-line article]. Retrieved June 24, 2004, from [www.habits-of-mind.net/pdf/16HOM2.pdf](http://www.habits-of-mind.net/pdf/16HOM2.pdf)

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## **APPENDICES**

## APPENDIX A

### Creative Problem-Solving Steps

	Step	Description	Example
1	<b>Clarify Your Goal</b>	A clear goal defines what success will look like. It is important when working with a team that everyone shares the same goal.	Recruit, screen, and match 25 adult mentors with program youth in the first year.
2	<b>Identify the Problems or Opportunity</b>	Specify constraints that may stand in the way or things that could facilitate your success.	Problems may include not knowing where to begin looking for volunteers, not having an application developed, not having decided on how to screen them, etc. Opportunities may include: the president of the local chamber of commerce is on your board of directors, you have a neighbor who works at a large local corporation, or your agency has already developed a strong relationship with the local media.
3	<b>Brainstorm Alternative Solutions</b>	Let ideas flow freely. Someone facilitates the flow of ideas and the ideas, which are written down. Do not start evaluating the ideas yet and set a ground rule that there are no bad ideas.	Brainstorming sessions may be used to develop your mission statement, various recruitment strategies such as publicity events, or for developing communications such as slogans and campaigns, etc.
4	<b>Choose the Best Solution</b>	Evaluate which ideas have the greatest potential using some method of measurement that will help you thoughtfully narrow your choices — keeping in mind your goals, resources, problems, and opportunities.	Board members, the executive director, and/or mentoring staff choose among strategies such as targeting local community organizations, private corporations, and/or colleges and how they will go about approaching them.
5	<b>Implement the Solution</b>	Utilizes project principles when delivering each strategy, including a detailed list of actions, dates, costs, and persons responsible.	Staff, board members, and current mentors may help staff a recruitment booth at a local street fair with staff members being responsible for the overall planning and coordination of the event.
6	<b>Evaluate the Results</b>	Determine and implement methods of measurement to evaluate a given solution's effectiveness in achieving a goal. Also, understanding why a solution works or not allows for continuous improvement.	Devising a process and forms to track each inquiry from prospective mentors to determine where they heard about your program and what influenced them to volunteer informs you which marketing efforts are bringing the greatest results.

**APPENDIX B**  
**MARKETING WORKSHEETS**





**Worksheet 3 – SWOT Analysis**

List the internal strengths and weaknesses of your program and the external opportunities and threats. It is useful to draw from staff, board members, and other stakeholders for this. A sample SWOT analysis is shown on Page 22.

<p><b>WEAKNESSES</b></p>	<p><b>THREATS</b></p>
<p><b>STRENGTHS</b></p>	<p><b>OPPORTUNITIES</b></p>

## Worksheet 4 – Mission Statement

### Part I

With other program stakeholders, generate words and phrases for the following questions that reflect the purpose of your program.

WHO – Who is involved and who benefits?

WHAT – What does your program do?

WHEN – Are there any time considerations?

WHERE – What geographical area do you cover?

WHY – What do you hope to achieve?

### Part II

Using the words and phrases you have listed above, either draft a mission statement using your own format, or use the template provided below as a starting point. Sample missions statements are shown on Pages 24, 27, and 35.

The mission of \_\_\_\_\_ (your program name) is to  
\_\_\_\_\_ (what your program does)  
for \_\_\_\_\_ (clients your program serves) in  
\_\_\_\_\_ (geographical area) in an effort to  
\_\_\_\_\_ (what you wish to achieve).

## Worksheet 5 – Recruitment Goals

Use the following table to list your goals. An example recruitment goal is provided. Break primary and secondary audiences into separate goals. Goals should be as specific as possible.

<b>Goals</b>	<b>Success Measures</b>
Example: <ul style="list-style-type: none"><li>Recruit, screen, and train 40 mentors to make 30 matches in first six months</li></ul>	<ul style="list-style-type: none"><li>30 matches are made in first six months</li></ul>

## Worksheet 6 – Target Audience

Given your program design, which population groups would make the most appropriate mentors for your program? Think through any special issues about your program such as youth objectives, match meeting times, and place of meetings. List the target audiences that best fit for your program and the pros and cons of each. Then, prioritize the audiences you will target first.

Priority	Target Audience	Pros / Good Fit With Program	Cons / Poor Fit With Program
	<p>Example:</p> <ul style="list-style-type: none"> <li>▪ College students enrolled in cultural and social service programs</li> </ul>	<ul style="list-style-type: none"> <li>▪ Local college is within one mile of school-based program</li> <li>▪ Diverse mentee population: 10 languages spoken in homes of target school</li> </ul>	<ul style="list-style-type: none"> <li>▪ Unstable population; have changing schedules and priorities</li> </ul>



## Worksheet 8 – Strategies and Tactics

List the specific goal for which you wish to develop strategies and tactics. Then brainstorm and list individual strategies to achieve the goal in the left column. Flesh out specific tactics in the right column that support each strategy. You may need to use multiple pages for additional goals or strategies.

Goal	
Example: Recruit and match 40 mentors in the next year.	
Strategy	Tactics
<ul style="list-style-type: none"> <li>Recruit senior citizens from local community and retirement centers to mentor youth in school-based program</li> </ul>	<ul style="list-style-type: none"> <li>Attend and present at monthly senior center luncheons</li> <li>Advertise in retirement center newsletters</li> <li>Develop brochure targeted to seniors</li> </ul>







## Worksheet 12 – Marketing Communications Worksheet

This worksheet can be used for any marketing communications project. It is useful for describing and clarifying the elements of each project and what you hope it will achieve. Guidelines for completing the marketing communications worksheet begin on Page 43.

<b>Marketing Communications Worksheet</b>
Project Description:
Project Objective:
Target Audience:
Positioning Statement:
Tonality and Graphic Requirements:
Key Features of Program:
Key Benefits (limit to and prioritize top three benefits):

## Worksheet 13 – Understanding Your Target Audience

Determine and list both the demographic and psychographic traits as well as perceived benefits to your target audience.

Target Audience	Demographic Traits	Psychographic Traits	Perceived Benefits
<p>Example: Retired Citizens (Primary target for middle school–based program with emphasis on career exploration)</p>	<ul style="list-style-type: none"> <li>• Over 60 years of age</li> <li>• Retired professionals</li> <li>• Some college education +</li> <li>• Live within five miles of ABC middle school</li> </ul>	<ul style="list-style-type: none"> <li>• Desires safe environment</li> <li>• Desires limited driving</li> <li>• Values education</li> <li>• Values volunteering</li> <li>• Has available time</li> <li>• Comfortable in school setting</li> </ul>	<ul style="list-style-type: none"> <li>• Desire to give back to the community</li> <li>• Recognition with peers &amp; community</li> <li>• Fulfill need in community</li> <li>• Stay productive</li> </ul>
<p>Primary:</p>			
<p>Secondary:</p>			
<p>Tertiary:</p>			

## Worksheet 14 – Marketing Communications Questionnaire

Be sure to provide a private and quiet place to conduct your research. Before beginning the interview or focus group, introduce what the project is about and let them know their answers will help your program succeed. Encourage them to answer openly and honestly, as there are no wrong answers. Provide interviewees or focus group participants with one message at a time. Let them take a few minutes to read it and look it over. Then ask them the questions listed below.

1. Reading the (message, brochure, flyer, etc.) in front of you, what is your first impression or the first thing you notice or that stands out about it?
2. What is the main message being conveyed?
3. (If not answered in the previous question) What do you think it is asking people to do?
4. What other messages are being conveyed to people? (Probe if necessary)
5. Describe to me what you think the program is about.
6. What do you like about it?
7. What don't you like about it?
8. Would this (message, brochure, flyer, etc.) increase your interest in being a mentor for this program? Why or why not?
9. Is there other information you would like to know that isn't included here?
10. Is there anything else you would add or change about it?





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