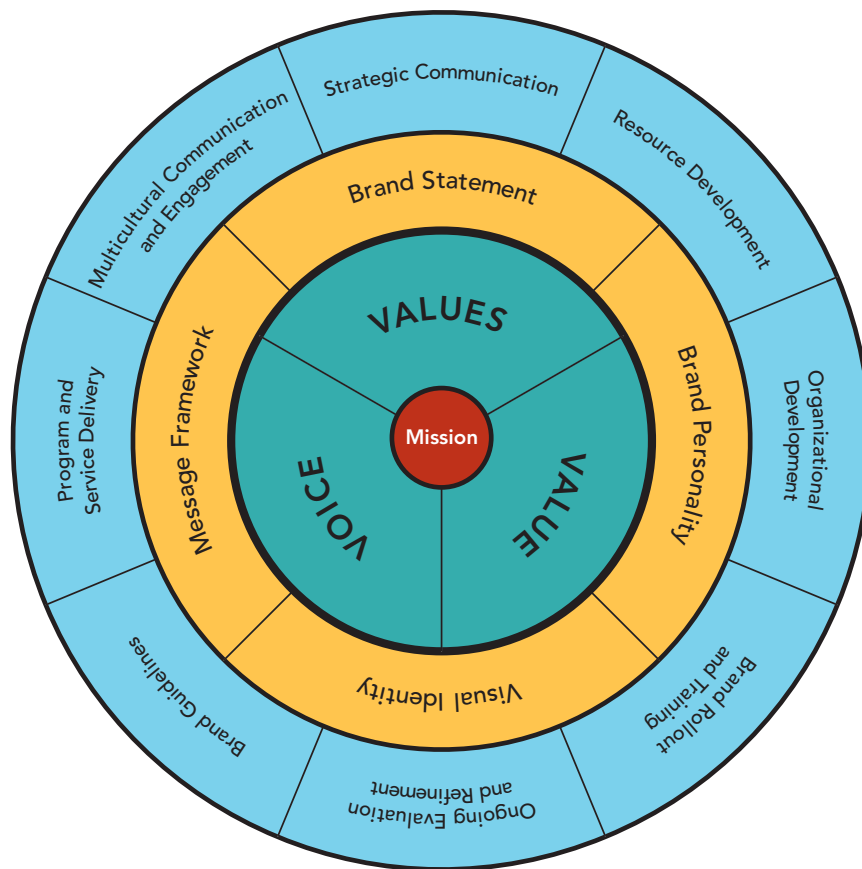


Values. Value. Voice.

The 3V's of Social Purpose Branding



Metropolitan Group

the power of voice

www.metgroup.com

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We are grateful to our clients for their incredible work in leveraging the power of their brands to create a just and sustainable world. We'd especially like to thank the organizations mentioned in this article, including Child Welfare Information Gateway, DC Public Library, Education Northwest, New Seasons Market, National Trust for Historic Preservation, National Youth Advocacy Coalition (NYAC), Openlands, Oregon Environmental Council, Oregon Tobacco Prevention and Education Program, Women Employed and World Agroforestry Centre. We appreciate the opportunity to collaborate in their work and share their stories.

Values. Value. Voice.

The 3V's of Social Purpose Branding

A woman receives a letter in the mail asking for a donation to support the building of a new wing for a children's hospital in her town. A man calls his local library looking for help in identifying Spanish-language resources to help start a small business. A public health nurse visits the home of new parents after the birth of their child to see how they're doing and answer any questions they might have about taking care of their baby. The director of a small nonprofit organization calls a local family foundation to inquire about funding sources for a new program the organization is developing. A young couple decides to install a sustainable bamboo flooring product supplied by a company whose commitment to the environment they respect. A teacher asks a museum docent to explain a new exhibit to a group of schoolchildren on a field trip.

All of the people described above have been touched by a social purpose brand.

And while the experiences described are fairly commonplace, they barely hint at the complexity of branding in today's social purpose landscape.

If the woman described above opening her mail is like most people, the letter asking her to pledge financial support to the children's hospital in her town is likely to be one of dozens of such solicitations she'll receive that year.

And since several companies supply bamboo flooring, the young couple's decision is likely informed as much by their perceptions of the company's sustainability commitment as it is by product styling, availability or price.

What is a social purpose organization?

A social purpose organization is a nonprofit, public sector or for-profit entity that exists to advance a social good. In the case of a double bottom line social purpose organization, success is defined by advancing a social good and achieving financial sustainability—or in the case of a socially responsible business, creating sustainable profits. A triple bottom line organization has the additional objective of being environmentally responsible.

The growth in social purpose organizations has been explosive in recent decades, and the lines between nonprofit, public sector and for-profit social purpose organizations have become increasingly blurred. Today, social purpose organizations are more likely to compete with other social purpose organizations with similar missions that promote their own solution to address similar or overlapping issues. These organizations also are likely to compete for the same customers, audiences, constituencies, volunteers, donors and allies. If you want to help combat breast cancer, for example, you could direct your money to the American Cancer Society, the Breast Cancer Fund, Susan B. Komen for the Cure, the National Breast Cancer Foundation or any of dozens of other national and local groups committed to supporting people with, preventing the causes of and finding a cure for breast cancer. You might also choose to patronize any number of for-profit enterprises such as Macy's, Boston Market or Bank of America, all of whom have participated in fundraising efforts for cancer prevention and research.

Which of these best reflects your own values? Which organization do you most trust? Which organization have you actually experienced in some way? And what was that experience like? Which organization inspires you to action?

All of these questions are central to the awareness or equity a brand seeks to build.

Too often, however, social purpose organizations equate brand with logo, not realizing that a logo is only the creative depiction of a brand. The brand itself is the aggregate of feelings, associations and experiences jointly created between the organization and those with whom it interacts.*

Here are a few examples of what we mean...

In the case of the young parents who opened their home to a visiting nurse, did the visit meet their expectations? How did the visit make them feel? Were they relieved and comforted to find a friendly and supportive person who wanted to help them be the best possible parents, or were they left embarrassed and frustrated, feeling that nothing they do is good enough? Did they feel the visit taught them something new they can put into practice in raising their child, or did they feel it was a waste of time?

How responsive was the reference librarian to the man's request for help identifying Spanish-language materials to help start his own small business? Did he feel respected or patronized? Did he feel the library welcomed his inquiry and would help facilitate his research, or did he feel like he was imposing and ultimately would be disappointed by the resources available to him? If he went to the library, did he find what he was looking for? Did the quality of the help he received reinforce or challenge his experiences with other library programs or services?

* For a glossary of common branding terms, please refer to Appendix A

If the answers to these questions lean in a positive direction, then the social purpose organization stands a reasonable chance of creating a constructive brand identity. Of course, the reverse is also true.

Creating a social purpose brand is a two-way relationship. While the social purpose organization might be very clear about how it wants to be perceived, understood, valued and experienced by those it serves, its brand exists only as an intention until it is received, experienced and processed by its audience. Then it becomes a reality.

Branding is part of every aspect of the organization's work and the experience of those it touches, which is why it is essential to take a more expansive view with regard to social purpose branding. It is all well and good to develop a wonderful new brand platform and logo. But don't forget to consider whether changes in staff and volunteer interactions, stakeholder experiences, program design and product or service delivery might help you better reflect the attributes you've identified as central to your new brand identity. By neglecting these key elements, you risk creating a brand that is only surface deep.

Ultimately, the challenge for social purpose organizations is to do everything in their power to increase the likelihood that the reality of the audience's experience will match the organization's strategic intentions.

In meeting this challenge, Metropolitan Group (MG) draws on more than 20 years of experience in crafting strategic and creative services, and designing powerful brands to help social purpose organizations build a just and sustainable world. We present here our own approach—MG's 3V Social Purpose Branding—in the hope that it builds the capacity of social purpose organizations to more effectively advance their missions.

A good brand:

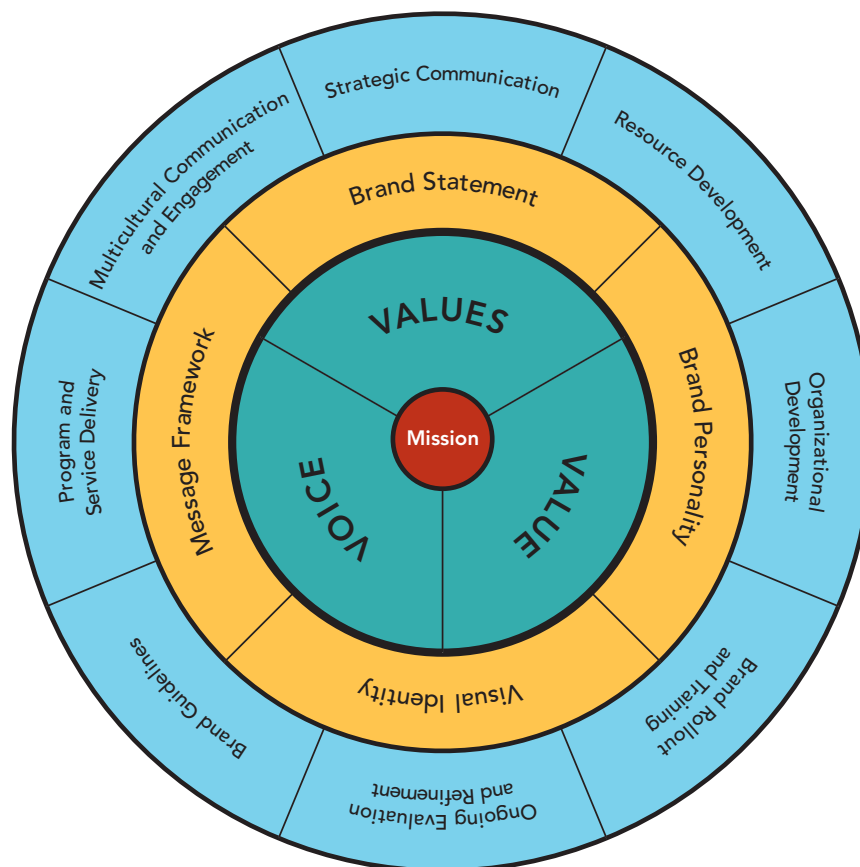
- is a tangible manifestation of the organization's mission for internal and external audiences;
- establishes a connection to shared community values, thereby building a stronger sense of connection with—and loyalty among—its allies, customers, partners, volunteers and donors;
- distinguishes an organization's unique promise or value in a competitive marketplace;
- speaks with a consistent voice that aligns with the value and values proposition of the organization as well as resonates with stakeholders;
- helps break through the "communication clutter" to attract attention to, and understanding of, the organization and its mission;
- both reflects and helps drive choices that are consistent with the organization's vision and strategic direction;
- builds equity for the organization as a trusted and vital resource, which can help the organization weather challenges;
- strengthens the organization's ability to engage customers and stakeholders, increasing philanthropic dollars and earned income; and
- helps attract staff and board members, strategic partners and volunteers who share the organization's vision and values.

MG DEFINES A SOCIAL PURPOSE BRAND AS FOLLOWS:

Grounded in an organization's mission, a social purpose brand is the sum of the aggregate experience of the interaction between the organization and those it seeks to engage and serve, reflecting their shared **values**, the **value** the organization brings to those it serves and the **voice** with which it presents itself and speaks to the world.

Creating and advancing a social purpose brand occurs at three different levels:

- **Define it!**—Identifying the underlying foundation of the brand upon which all tangible manifestations of the brand are built.
- **Express it!**—Creating the visual and linguistic representations of the brand.
- **Live it!**—Manifesting the brand through the organization's products, programs and services, and in every interaction with those it seeks to serve and engage.





Define it!

In seeking to define a social purpose brand, it is helpful to begin with some level of discovery—which is to say, learning as much as you can about how the brand is experienced today, both internally and externally, compared with how you would prefer the brand to be experienced in the future. While a full-scale brand audit might be appropriate in some cases, even an informal process involving conversations with different people representing your key constituencies can yield a wealth of helpful information.

Regardless of the path you follow in defining a social purpose brand, pay close attention to the centrality of the organization's mission. We call this “mission in the middle.” We recommend starting every branding process with a deep immersion in your mission, if only for review and validation. This process invariably involves some pretty intense conversations about what you value as an organization, what difference you want to make in people's lives, and how you want to approach and engage the people you serve.

Hopefully, in the course of such a review, the social purpose organization will validate and reaffirm or refine its underlying mission, finding it still relevant, authentic and compelling. In so doing, you give yourself the opportunity to re-invigorate your work with a renewed sense of purpose, which will help immensely in the branding work to follow.

Tips for Developing a Social Purpose Brand

Here are some steps to consider in the discovery process of defining a social purpose brand:

- Audit your existing brand. What personality describes it? What messages support it? How are you using it? What's working and not working?
- Identify and engage key audiences and constituencies (e.g., executive interviews, focus and discussion groups, and surveys).
- Identify how branding supports your organization's strategic plan, goals, objectives and strategies.
- Perform a peer assessment, using this question as the basis for your assessment: What is your unique position or what are your unique benefits relative to other social purpose organizations with a similar mission?
- Perform an environmental scan. What external trends or developments factor into your brand equation?
- Conduct an internal assessment based on these questions: What systems do you have in place to ensure consistency of brand experience? Are your programs and services a good reflection on your brand?
- Before you finalize your new brand, test elements of it with your key audiences and constituencies both internally and externally.
- Focus on what works rather than on what you like. Developing a brand is a strategic decision guided by intent rather than an aesthetic exercise guided by personal preference.



Of course, you might also find that your mission statement needs some work. Over time, a mission statement can become stale or outdated. Or you may realize it's more a statement about what you do than why.

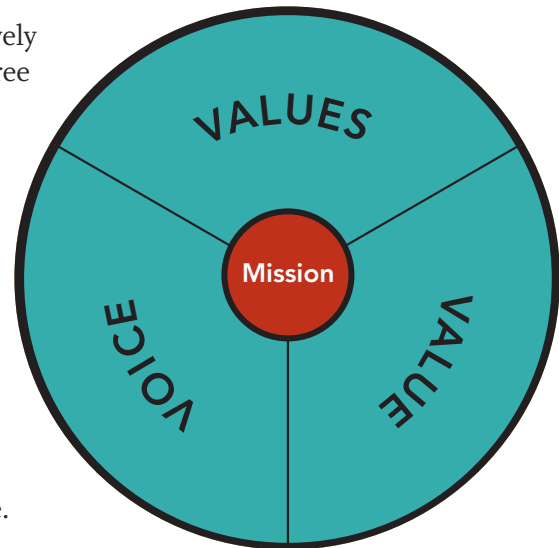
If that's the case, take time to make the necessary adjustments to your mission statement. It's far better to make modifications while you're deeply immersed in the self-examination inherent in a branding process than to lose the moment. After all, a brand that somehow fails to connect with and reflect an organization's mission will never be authentic.

Wrapping around the mission—both figuratively and literally in our model to the right—are three critical aspects of a social purpose brand:

- The core **values** of the organization and those it seeks to engage and serve;
- The **value** it delivers both tangibly and intangibly to its audiences; and
- The **voice** with which it presents itself and speaks to the world.

Values. Value. Voice. These are the 3V's of social purpose branding.

Let's take a look at each of them, one at a time.



VALUES

Here we're talking about the core values that are central to your organization and connect you to the people you're trying to engage and serve. Are you deeply committed to inclusiveness? Do you believe it's essential to reflect integrity in everything you do? Do you believe in shared leadership? If so, these beliefs should probably be among your core values.

In going through the exercise of identifying your core values, it's important to be honest with yourself.* If your organization prefers a stay-the-course approach that relies on proven, tried-and-true strategies, then you probably shouldn't include "innovation" among your core values. Don't window dress your core values list to reflect what you think others would like to see. If it's not a true reflection of who you are, it will never be authentically reflected in your brand.

In our branding work for **Openlands**, a regional land conservation nonprofit in northeastern Illinois, we identified the organization's core values as shared responsibility

* To identify your own 3V's, use the worksheet in Appendix B as your guide.

and environmental stewardship. When we worked with the **Child Welfare Information Gateway**, a service of the U.S. Department of Health and Human Services' Children's Bureau that provides information on child abuse and neglect as well as foster care and adoption, the agency chose compassion and warmth, responsiveness, access and multiculturalism as core values.

It's essential to find some way to get a solid understanding of how your core values align with the audiences you seek to engage and serve. Making assumptions about those value alignments can be a risky proposition. That lesson was central in the development of a campaign brand for the **National Youth Advocacy Coalition (NYAC)** to encourage young African-American men to be tested for HIV/AIDS as well as to retrieve their results. During the discovery process, we found that a key value for the audience was to be treated with respect. Focus groups revealed frustration with other public health messaging that seemed to assume our audience didn't know or care about their own health or the health of others. Given that other campaign messages were ignored or received as patronizing, we created the *You know different* campaign, which recognized and respected the audience as having the information and knowledge to take the desired action. The campaign has experienced incredible success in motivating both testing and results retrieval.

It's important to remember that the statement of your core values can—and should—create a set of expectations both internally and externally. If multiculturalism is important enough to rise to the level of being included among your core values, then you need to make sure your organization is committed to a pluralistic approach in everything you do—from the makeup of your staff and the membership of your board to the cultural context and the languages of the materials you produce.

Clarity about your values can help drive not only branding but also programmatic and operational choices. For example, if openness and accessibility are among your core values, you might want to re-think whether a “press 9 to speak to a live person” phone system or a website whose content is largely “for members only” is right for you.

Your core values should stand the test of time. As such, you shouldn't have to revise them very often, although you should periodically check to see if you are bringing them to life in your work.





VALUE

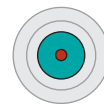
The “exchange theory” is widely accepted in customer marketing settings. It basically says that, all things being equal, no one ever replaces one behavior with another unless they get something in return. And it’s no less relevant to social purpose organizations, whether nonprofit, for-profit or in the public sector. The benefits offered as incentives to engage in a new behavior can be both tangible and intangible. Buying a more energy-efficient automobile, for example, might yield benefits that are both tangible (e.g., savings on the purchase of gas) and intangible (e.g., a feeling of pride for driving a “green” car).

The second “V” in social purpose branding represents a clear articulation of the tangible and intangible benefits that an organization provides to those it serves—the value it delivers. These benefits may—and probably should—change over time, but they most certainly need to reflect what your audience wants and needs. Important questions to ask when developing your *value* list are:

- What difference does your organization create in people’s lives and in their communities?
- In what ways does your organization make people feel better about themselves?
- What tangible benefits are experienced by people and communities who utilize your services and products?
- What return does your organization provide on the investment of your audience’s time and money?

The answers to these questions will illustrate tangible and intangible benefits. For example, a community-based mental health provider might include on its value list the fact that it increases resilience in children and strengthens families while creating long-term community stability.

More often than not, it’s risky to make assumptions internally about the *wants* and *needs* that define the benefits your audience values most. By exploring the decision drivers for customers, funders and stakeholders, you can identify key value propositions that align with the value delivered by your organization. For example, the organic food market in the United States had reached a certain level of penetration by focusing on its core *values* drivers of environmental and social responsibility. But major *value* drivers for food purchasing are flavor and appearance. Once organic producers and retailers added these *value* drivers into the mix by increasing their emphasis on the delicious flavor and natural beauty of their products, they found their market share grew, as did their social impact.



VOICE

Voice refers to the way an organization expresses itself to the world. It is reflected in the words an organization employs, and the tone with which those words are used. It is reflected in the images—and even colors—the organization uses and evokes.

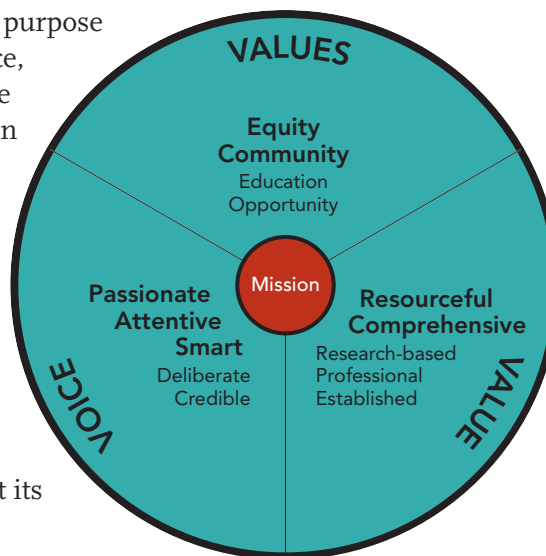
An easy way to hear a brand's voice is to imagine the brand as a person delivering a speech. What adjectives would observers use to describe the person delivering that speech? Credible? Visionary? Reliable?

Openlands, for example, identified the following adjectives to describe the voice of its brand: solid and stable, but progressive; welcoming and inclusive; and balanced and rational.

For **New Seasons Market**, the brand's voice is an authentic reflection of the customer and community experience: neighborly, knowledgeable, down-to-earth and fun.

The task of identifying the voice for your brand can and should be fun. If you find it hard to get your arms around a list of adjectives, try asking yourself questions such as: What kind of musical style would capture our brand? What kind of food would we be? You might even try identifying people who embody what you want your brand to represent. One client described their brand persona as “Albert Einstein meets Harrison Ford.” While there was laughter all around at that characterization, it was an insightful observation that clearly resonated with every member of the team.

Once you've articulated the 3V's of your social purpose brand, it is helpful to capture them in one place, as we did for **Education Northwest** during the development of their new brand (see illustration at right). The organization's mission is to improve learning by building capacity in schools, families and communities through applied research and development. We worked collaboratively with **Education Northwest**, its internal constituencies and its external audiences to identify its 3V's. The relative importance of each attribute was determined by looking not just at its relevance for the organization's core audience but also at its distinctiveness in the field.





Express it!

At this layer of social purpose branding, you start to express the brand using words and imagery. The four components of social purpose brand expression are:

- **Brand statement**—The core distillation of a social purpose brand in a powerful paragraph conveying the organization’s 3V’s.
- **Brand personality**—A narrative paragraph that describes the organization, incorporating words and evoking imagery that communicate the personality of the brand as if it were a person.
- **Identity development**—The visual components of the brand, including name, logo and tagline.
- **Message framework**—The overarching, long-term message platform for an organization that communicates its values and value proposition, and that can be customized with calls to action tailored to specific audiences.

BRAND STATEMENT

The expression of a social purpose brand often begins with its brand statement, which is a powerfully written narrative paragraph that articulates the essence and personality of the brand and conveys the organization’s 3V’s. The brand statement should accurately define the brand experience, including the expectations that internal constituencies, external audiences and allies should have of the organization.

Brand statements provide a touchstone in developing the literal representations of the brand, such as its logo, tagline or message framework. As such, it is not uncommon for the brand statement to mirror the boilerplate text used by the organization to define itself publicly. In the example below of the boilerplate we developed for the **Oregon Environmental Council**, the text closely resembles the original brand statement:

The Oregon Environmental Council safeguards what Oregonians love about Oregon—clean air and water, an unpolluted landscape and healthy food produced by local farmers. For more than 40 years we’ve been a champion for solutions to protect the health of every Oregonian and the health of the place we call home. Our vision for Oregon includes solving global warming, protecting kids from toxics, cleaning up our rivers, building sustainable economies, and ensuring healthy food and local farms. Find out more at www.oeconline.org.

A brand statement also tends to closely relate to the “role” message that many organizations include in their message framework, to be discussed in greater detail below.



BRAND PERSONALITY

Identifying a brand's personality can be a critical step because it informs the choices made in the creation of the visual identity and the message framework. Developing a brand personality statement is a bit like writing a testimonial. If your organization was a person for whom you had enormous respect and personal affection, and you were invited to nominate that person for an important award, what would you say about him or her? What would you say about the type of person they are, and what motivates them? In what ways do they live out their core values and positively touch the lives of others? What would you identify as their dominant character traits? What difference do they make in the world?

Unlike a brand statement, which employs language that can be used externally, the brand personality is a tool used to help your internal constituencies better understand how the organization embodies the brand and how the brand reflects the organization.

It's no accident that a description of a brand's personality often reads like a description of the priority audience for a social purpose organization, as in this example from the **DC Public Library**:

DC Public Library is a "Renaissance woman" who is naturally curious and interested in a little bit of everything. She has a stack of materials on her nightstand, including some fiction, a biography, a philosophy book and a variety of magazines and newspapers. She spends a lot of time online, reading blogs, discovering new websites and researching hobbies.

She gets down on the floor to play with the children in her life and delights in introducing them to some of the classic books she read when she was young, as well as new books she discovered at her library.

She loves music and movies and now owns an iPod and an MP3 player so she can access multiple formats. She was one of the first people to buy and use a Kindle. She loves to share it with people she meets on the Metro who ask her what she is reading. She's always expanding her mind and currently is learning Spanish and Korean.

When you walk into a party, she is the first to greet you and to introduce you to someone you might find interesting to talk to. She is easygoing and flexible. She is equally comfortable dressed up for an important business meeting as she is pulling on jeans and a colorful organic cotton T-shirt to meet a friend for coffee. Before leaving her home, she adds a conversation piece to her outfit: a scarf from India, an enamel bracelet from Japan or a woven handbag she picked up at Eastern Market.

DC Public Library is a friend you can count on no matter what. Knock on her door anytime and feel welcome. Friends and family flock to her for ideas, support and lively conversation. On any weeknight you'll find neighbors or guests perched at her kitchen



counter while she prepares a simple meal using a recipe she just downloaded from the Internet. Sometimes the conversation gets as hot as the kitchen, but there is always respect and compassion.

As demonstrated by this example, strong expression of your brand personality should evoke both pride and a bit of modest embarrassment. If it doesn't, then it probably needs some work.

IDENTITY DEVELOPMENT

Building off the organization's 3V's, and guided by the brand personality statement, it's time to express the brand in visual terms. While developing the brand's identity, make sure to align the organization's name, tagline and logo with the 3V's in the brand platform.

Name

In the same way the branding process begins with a review of an organization's mission, the identity development process often starts with consideration of an organization's name. Sometimes a name change is a given or a necessity, but just as often it's "off the table" as part of a brand development process. Still, it's wise to examine your name and determine whether it accurately reflects your core values and effectively communicates who you are, what you do and why. If the name poses challenges, it's best to consider how you might address those challenges before moving on to the development of a logo or tagline.

Consider the example of Mothers Against Drunk Drivers, which rebranded itself as Mothers Against Drunk Driving. The change was easy enough since the MADD acronym was maintained, but it represented a seismic shift away from demonizing the driver and focusing instead on preventing a behavior. In so doing, MADD expanded the relevance of its messaging to a wider audience that might grudgingly relate to driving under the influence, but who would never consider themselves drunk drivers.

The decision by the American Association of Retired Persons to rebrand itself by its acronym, AARP, reflects an obvious shift in marketing strategy to attract members as young as 50 who might very well be at least a decade or more away from retirement.

In our work, we have found similar opportunities to increase both relevance and alignment between an organization's name and its brand platform. One such example can be found in the new name created to reflect the consolidation of the National Clearinghouse on Child Abuse and Neglect Information and the National Adoption Information Clearinghouse, two services of the Children's Bureau, U.S. Department of Health and Human Services, Administration for Children and Families. Combining and expanding these two clearinghouse services aligned with the integration of state systems and addressed the need to provide a more comprehensive approach to providing



information and resources across the child welfare topical scope. The existing names did not reflect the evolution in service provision and delivery or the needs and wants of their constituencies. The word “clearinghouse” in both names suggested the *pushing out* of information that didn’t really reflect the proactive and interactive services provided. The new name, **Child Welfare Information Gateway**, better suggests the *value* provided by the integration of service as a portal *into* a wealth of resources and information while simultaneously elevating the core *values* driver of child welfare through much more explicit expression.



We also worked with the Northwest Regional Educational Laboratory on another social purpose branding project. The organization, originally chartered in 1966 as a regional federal program, now works with schools, districts and communities throughout the country on comprehensive, research-based solutions to education needs. In an increasingly crowded marketplace, the organization needed to build its brand, but audience research revealed, among other things, confusion about the name. Insider audiences knew and loved it; external prospects were baffled. The long name was often shortened to NWREL, which was impossible to say and lost meaning. Leading with “Northwest Regional” was limiting and redundant, even though “Northwest” carried cache in education circles. “Laboratory” was a holdover from the original federal designation, but left people thinking of blood samples, not education. It certainly didn’t reflect the organization’s desired brand position of smart, approachable and teacher-focused. The new name, **Education Northwest**, puts the main value front and center, and is simpler and more direct.

Logo

A logo typically consists of a “mark”—the image or icon associated with a brand, such as the = symbol used by the Human Rights Campaign—and the logotype—font type, size and style—used for the treatment of the organization’s name. Some organizations employ only a distinctive logotype without any associated imagery, such as the National Trust for Historic Preservation. The brands of some social purpose organizations are so well known—for example, the American Red Cross—that their mark can stand alone. This is, by far, the exception rather than the rule, and is most often the result of sustained investment in building brand visibility and awareness over time.

NATIONAL
TRUST
FOR
HISTORIC
PRESERVATION



In developing the elements of a new brand identity, remember that all decisions should be driven primarily by strategic intention rather than by aesthetic preference. As a social purpose marketer, you might prefer the color blue. But if your audience tells you that blue makes them feel sad, you’ll need to re-think your color scheme. After all, it’s not only a question of what you like, it’s also a question about what works.



The old logo, shown below, for the **World Agroforestry Centre** featured its legal name (International Council for Research in Agroforestry) and the imagery of a lone tree and crop icon in a circle. In that form, the logo did not accurately reflect the organization's core purpose of connecting science, people and nature to create food security, pathways out of poverty and environmental health. The logo we developed, also shown below, features the new name and imagery that initially appears to be a small grove of trees. Upon closer examination, however, you can discern that the trunks of the trees are actually people holding up the branches.



A domestic organization with a similar focus on connecting people to nature, **Openlands'** old logo, shown below, featured the illustration of a Burr Oak, native to the Midwest region, rising out of a hillside. In addition to looking old-fashioned—something that did not reflect the organization's brand platform as forward-thinking and progressive—many external constituents pointed out that the hill depicted in the illustration was not a typical feature of the region's geography. The new logo, also shown below, retained the centrality of the Burr Oak, but instead employed a black and white photograph, depicting itself as both a classic and progressive organization. The photograph also shows a pathway to the tree, thereby inviting the viewer into the picture and reinforcing the organization's core value of connecting people to nature.



Exploring imagery for incorporation into a brand identity in the form of a logo is a complex process that requires equal focus on strategic objectives and creative vision. A beautiful, artistic image that fails to effectively communicate the values, value or voice of a social purpose organization is unlikely to contribute significantly to the building of authentic brand equity.



As with all aspects of social purpose branding, it is critical to get the input and insights of both internal constituencies and external audiences, preferably before the decision-making process has progressed too far. Since it's hard, and not necessarily desirable, to keep subjective judgment and personal preference from being part of the equation when considering a new visual identity, knowing what works and what doesn't in communicating the brand helps to keep the process grounded in strategy.

Tagline

Taglines are widely used in many different branding contexts. Some social purpose taglines have become indelibly attached to the brand. Consider the United Negro College Fund's longtime tagline, "A mind is a terrible thing to waste."

Whether you need a tagline as part of your brand identity depends on a number of strategic, creative and logistical factors. In general, a tagline should be used to advance understanding of a social purpose brand. If you don't need one, it's probably best not to use one. However, you might need a tagline if your organization's name does not clearly articulate your mission or the focus of your work. Also, you might add a tagline to refresh a brand when other aspects of the visual identity have or will remain unchanged for any number of reasons.

The tagline for the DC Public Library—"Check it out"—communicates something new and exciting is happening at the library.

Shown below, the tagline for **Women Employed**—"It's up to us"—reflects the core values of the organization while subtly reinforcing the brand's mark, which features the organization's acronym "We."



Each word of a tagline deserves careful consideration. In the case of Openlands' tagline, "Conserving nature for life," multiple meanings are communicated in the space of four words. The organization's conservation mission is clearly expressed and the expansive focus of its work is reflected in the word "nature," while the words "for life" signal both the permanence of conserving for the long term and the organization's value of connecting people with nature.



MESSAGE DEVELOPMENT

The messages used by an organization to communicate both internally and externally are core components of a social purpose brand.

A message framework is important because people need to be able to talk about the organization in a wide variety of settings. It can be easy enough to memorize and recite your organization's mission, but that doesn't mean you won't struggle in response to the question, "What does that mean?"

The brand statement offers important insights into how a social purpose organization answers that question, and elements of that answer are important aspects of the organization's message framework. But a strong message framework should also answer another important question that addresses the concerns of external audiences and stakeholders: "What does that mean to *me*?"

A good message framework gives a social purpose organization the tools to empower every staff member and volunteer as compelling storytellers. You need to start with creation of the message framework itself. What is the most important message you want people to hear and believe about your organization? And what supporting points or evidence do you want to communicate to back up your core message?

Ask yourself three questions:

- **What?**—What is the most important information people need to know?
- **So what?**—Why is that information relevant to the people you're trying to reach? And why should they care?
- **Now what?**—What do you want people to do in response to this information?

While the resulting message framework may or may not be organized in this way, it's a useful exercise to help uncover the most important aspects of the message framework.

Often, it is helpful to distill the message framework to a core statement that is easy for all internal and external constituencies to remember and recite. Take, for example, the core message we created for the **National Trust for Historic Preservation**:

The National Trust for Historic Preservation helps people protect, enhance and enjoy the places that matter to them.

Testing of the message framework, once developed, with your internal and external constituencies is an invaluable part of the process. Again, the purpose is to find out whether or not it works.



For example, you might test the framework with board members, staff members, funders and collaborative partners through informal small-group or one-on-one discussions. Testing with external audiences is frequently done through focus groups. Whatever the format, you're looking for answers to questions such as these:

- Upon reviewing this message framework, what can you tell me about what this organization stands for?
- What's memorable?
- What works?
- What doesn't?
- What, if anything, would hearing this statement motivate you to do?
- Do any words jump out at you, or have positive or negative connotations?
- In cases where alternative message platforms have been developed, which of the platforms best reflects what the audience would need or expect from the organization?

These insights can be amazingly helpful, giving you the chance to modify the message framework before spending time and money translating it into website copy, advertising, direct-mail solicitations, marketing brochures, media outreach materials and grant proposals. Whether you're listening to your colleagues and board members or to your external partners and those you serve, remember to separate what people like or dislike from what works.

Sample Message Framework*

The Oregon Tobacco Prevention and Education Program (TPEP) engaged MG to develop a brand for its campaign to combat tobacco. The message framework for the brand we created—*SmokeFree Oregon*—represented a deliberate strategy to move away from anti-smoking messaging targeting the 17 percent of Oregonians who smoke to engaging and inspiring the 83 percent of Oregonians who don't. While our message frameworks don't always follow the *What?/So what?/Now what?* format, it seemed to work well in this particular instance.

WHAT?

We can create a smokefree culture that supports healthy people, a cleaner environment and an Oregon where tobacco use is uncommon.

SO WHAT?

When we reduce the use and impact of smoking and tobacco, we can breathe cleaner air, help smokers quit and keep our kids from starting. Nonsmokers, smokers, our families, our communities and our state will all benefit.

NOW WHAT?

Join us to help make it happen. Make smokefree Oregon a priority—in your own life, your home and your community.

* The complete version of this message framework is Appendix C.



Live it!

Having defined and expressed a social purpose brand, the all-important next step is to live it! As we've described above, a social purpose brand does not really exist until it has been expressed *and* experienced by its audience. Living it in everything you do is essential. It's important to look at your organization from the outside. Try to identify any disconnects where your brand's experience might not be everything you need it to be and focus your efforts on those areas first.

Here are some of the most common steps involved in living a social purpose brand:

- **Brand Guidelines:** Graphic standards, such as application guidelines of logo, type hierarchy and colors; internal and external co-branding standards, and environmental and sustainability standards.
- **Brand Rollout and Training:** Development and dissemination of internal and external rollout of the new brand, brand champion, spokesperson and staff training; integration of brand training into ongoing orientation programs, launch events, promotions and partnerships.
- **Strategic Communication:** Development and dissemination of internal and external communication tools, including talking points, boilerplate language, answers to frequently asked questions, new brochures and website.
- **Program and Service Delivery:** Integration of the brand into all programmatic areas of constituent, customer and stakeholder interface. Ensuring the new brand is reflected in how people experience the organization (e.g., how the phone is answered, customers are greeted, the environment of sites, etc.).
- **Organizational Development:** Internal change management and culture change to better deliver the brand experience or to apply core values and key value drivers clarified through the branding process.
- **Multicultural Communication and Engagement:** Outreach, communication and engagement within diverse cultural contexts to ensure relevancy.
- **Resource Development:** Outreach to, and engagement with, volunteer leadership, donors, corporate sponsors and cause marketing partners.
- **Ongoing Evaluation and Refinement:** Audience testing, setting measurement criteria, benchmarking, stakeholder feedback loops and reporting.

Conclusion

In an increasingly competitive marketplace, branding done well is an important asset for social purpose organizations in building their capacity, engaging their audiences, meeting their goals, serving their clients and customers, motivating the social change they seek and ensuring their sustainability.

An effective brand can serve as one of the most important tools used by a social purpose organization in the advancement of its mission. It's no surprise, then, that MG's 3V approach to social purpose branding puts mission at the center, then builds off the organization's **values**, **value** and **voice**.

Ultimately, 3V social purpose branding is a process that empowers your organization by connecting you to the deeply held values of your stakeholders, by embracing your organization's beneficial value, and by communicating in an authentic voice that resonates with your audiences. The clarity and power of a social purpose brand can serve as an effective lever to increase the power of communication, strengthen the culture of your organization, improve stakeholders' experiences and ultimately maximize your impact.



Metropolitan Group

the power of voice

ABOUT THE AUTHORS AND METROPOLITAN GROUP

Principal Author

Kevin T. Kirkpatrick, Executive Vice President



Drawing on more than 25 years of experience in social marketing, public will building, issue framing, messaging and branding, Kevin is the head of MG's Chicago office and a leader in our strategic communication practice. He specializes in helping social purpose organizations and campaigns to define, express and live a brand that more effectively advances their mission. Kevin is also the principal author of "Measuring What Matters: The Challenge of Quantifying Social Change," which was published by MG in 2009.

Co-Authors

Eric Friedenwald-Fishman, Creative Director/President



Eric is widely recognized as one of the nation's most effective experts in developing and implementing brand communication and resource development campaigns. He specializes in creating powerful message frames and major social marketing campaigns that build lasting social change, and has led the company in increasing revenues, including raising more than \$1 billion in support of client projects. Eric is the principal author of MG's *Public Will Framework*, a model that builds public demand for long-term change in a process that connects an issue to existing, closely held values of individuals and groups and leverages grassroots and traditional media strategies. He is co-author of *Marketing That Matters*, a book on marketing practices that benefit businesses and change the world. He is also co-author of the MG articles "Increasing Relevance, Relationships and Results: Principles & Practices for Effective Multicultural Communication" and "Measuring What Matters: The Challenge of Quantifying Social Change."

Laura K. Lee Dellinger, Senior Executive Vice President



Laura is an award-winning professional, leading MG teams throughout the country in the development of brand communication, education, advocacy and public will building campaigns; capacity-building and training programs; strategic plans; and public affairs strategies. She is the principal in charge of MG's Portland office and heads the firm's strategic communication practice. Laura is the primary author of "A Values-Based Approach to Social Purpose Advocacy," a step-by-step guide to crafting advocacy strategies that are based in community values and build upon effective communication approaches. She is co-author of MG's *Public Will Framework*; of "Building Public Will: A five-phase strategy goes beyond marketing to foster ongoing community support for libraries" (*Library Journal*, February 2006); and of "Increasing Relevance, Relationships and Results: Principles & Practices for Effective Multicultural Communication."

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Metropolitan Group is a full-service social change agency that crafts and integrates strategic communication, resource development and creative services that empower social purpose organizations to build a just and sustainable world.

MG has offices in Chicago; Portland, Oregon; San Francisco; and Washington, D.C.

MG works exclusively on behalf of social purpose organizations—nonprofits, socially responsible businesses, foundations and government/public agencies. We work as a team with our clients to create results, including sustainable attitudinal and behavioral change, increased product and program use, and expanded revenues and capacity.

Our four practice areas are:

Strategic Communication
Resource Development
Multicultural Communication
Organizational Development

Branding Services

At Metropolitan Group, we develop brands that advance mission and garner change-the-world results for nonprofits, businesses, foundations and public agencies, as well as their stakeholders, including sub-brands, partners, grantees, donors and communities.

Steps along the way include:

- Conducting research to uncover the essence of an organization, as well as the needs, values and motivators/decision drivers of its key audiences.
- Surfacing and clarifying a recognizable personality for the organization that helps to distinguish it as unique in the marketplace.
- Crafting of a comprehensive brand platform that includes a clear articulation of brand values, value and voice and a set of core brand messages.
- Developing a comprehensive brand positioning plan to support the organization in building brand profile and increasing brand equity for the organization.
- Providing consistent internal communication training and tools to ensure that internal audiences continually reinforce the brand.
- Establishing stakeholder feedback and evaluation methods to ensure that the brand application meets changing business and stakeholder needs.

Metropolitan Group also has an award-winning, full-service design studio that implements brand identities for all media and applications, including Web, advertising, annual reports, collateral, video and film, display and exhibit, and interior and exterior signage.

APPENDIX A

Glossary of Common Social Purpose Branding Terms

Brand: The aggregate experience that stakeholders have of an organization.

Brand ambassadors/champions: People inside and outside an organization who increase brand awareness by articulating a brand's values, value and voice to others.

Brand architecture/brand hierarchy: The structure of brands and how they connect to each other within an organization. For example, often there is a parent organization followed by "sub-brands" that may or may not use the parent organization's name.

Brand equity: A brand's ability to generate greater value compared with another brand, or the increase in value a brand generates for an organization compared with similar efforts made without a clearly defined brand.

Brand guidelines/brand standards: An internal set of tools available in an organization to educate, reinforce and motivate stakeholders to build and maintain a strong brand.

Brand identity: The visual representation of the brand, including logo, mark, color palette, fonts and other graphic elements employed.

Brand loyalty: The decision to choose a brand again, based on positive past experience.

Brand personality: A description of the brand as if it were a person.

Brand platform: A document for use by internal stakeholders that captures the core elements of the brand—values, value and voice, or the 3 V's—as well as the brand statement, personality, visual identity and message framework.

Brand position: A unique, sustainable and valued place a brand seeks to establish with its audience.

Brand promise: A brand's guarantee to fulfill specific needs or desires.

Brand recognition: A brand's ability to be recognized and understood, and viewed as an option.

Brand statement: The distillation of a social purpose brand in a powerful paragraph conveying the organization's core elements: values, value and voice, or the 3V's.

Brand vision: A clear articulation of the goals an organization has set for its brand to achieve.

Font: A specific size and style of type within a type family. An example of a font is 12-point Helvetica Bold.

Graphic standards and guidelines: Protocols and processes to ensure that consistent application of an identity preserves the integrity of the brand and its mission. While the guidelines may vary in complexity based on an organization's needs and applications, they usually include use of specific logo, typeface and color, and file formats to be applied to both print and screen. Guidelines also should address sustainability choices in terms of printing, distribution, purchasing policy and other factors.

Logo: The visual identity that generally consists of a "mark" (e.g., the = symbol used by the Human Rights Campaign), logotype (e.g., font type, size, style, etc.), and a tagline (e.g., "A mind is a terrible thing to waste") combined into a particular composition. Some logos eliminate the use of a mark and rely primarily on the logotype treatment of the organization's name (e.g., the National Trust for Historic Preservation).

Logotype: A specific font type, size and style applied to the name of an organization.

Mark: A symbol or graphic design used to distinguish a particular brand (see example in logo).

Message framework: The overarching, long-term message platform for an organization that communicates its values and value proposition and that can be customized with calls to action tailored for specific audiences.

Parent brand: The leading brand within an organization, under which sub-brands may fall (see also: umbrella brand).

Stationery/collateral system: Letterhead, envelopes, business cards, labels and other core business materials.

Sub-brands/sub-branding: Separately branded programs, products or initiatives that fit under a parent brand.

Tagline: A simple, poignant word or phrase paired with an organization's name that defines the organization, connects stakeholders to its mission, offers a call to action or some combination of these three functions.

Umbrella brand: The leading brand within an organization, under which sub-brands may fall (see also: parent brand).

Value: The tangible and intangible benefits provided by an organization.

Values: The core values of a social purpose organization as well as the values of those the organization seeks to engage and serve.

Voice: How the brand sounds when presented and spoken to the world.

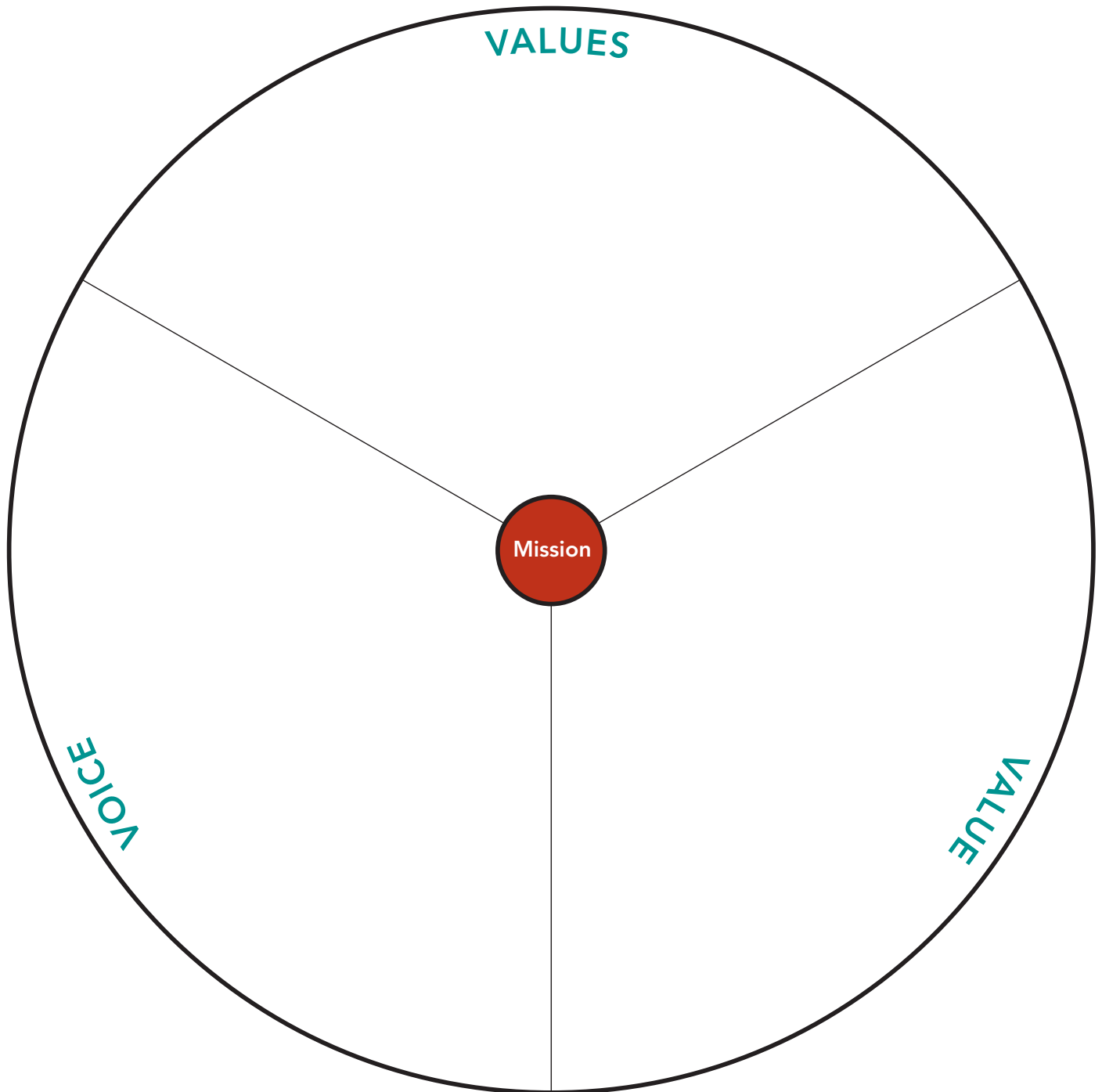
APPENDIX B

Worksheet

VALUES—What core values are central to your organization and connect you to the people you’re trying to engage and serve?

VALUE—What tangible and intangible benefits do you provide to your audiences?

VOICE—What adjectives would you use to describe your organization?



APPENDIX C

Sample Message Framework—Complete Version

The Oregon Tobacco Prevention and Education Program (TPEP) engaged MG to develop a brand for its campaign to combat tobacco. The message framework for the brand we created—*SmokeFree Oregon*—represented a deliberate strategy to move away from anti-smoking messaging targeting the 17 percent of Oregonians who smoke to engaging and inspiring the 83 percent of Oregonians who don't. While our message frameworks don't always follow the *What?/So what?/Now what?* format, it seemed to work well in this particular instance.

WHAT?

We can create a smokefree culture that supports healthy people, a cleaner environment and an Oregon where tobacco use is uncommon.

SO WHAT?

When we reduce the use and impact of smoking and tobacco, we can breathe cleaner air, help smokers quit and keep our kids from starting. Nonsmokers, smokers, our families, our communities and our state will all benefit.

Supporting messages:

- We will protect Oregonians—and especially children—from secondhand smoke.
- We'll prevent future generations from starting to smoke.
- We will save lives, improve the health of Oregonians and reduce health care costs by addressing the leading cause of preventable illness and death in our state. No other health issue has this much impact or this clear a solution.
- We'll have a cleaner environment, with less litter and better air quality.
- We'll support smokers trying to quit by creating smokefree environments and providing services and support they need to be successful.

NOW WHAT?

Join us to help make it happen. Make smokefree Oregon a priority—in your own life, your home and your community.

Audience-specific calls to action:

Often the *Now what?* brand message is conveyed through calls to action designed for specific constituencies. Some examples relevant to the *SmokeFree Oregon* campaign are as follows:

- Take individual action.
 - Make your home and car smokefree.
 - Ask for and choose smokefree housing, businesses and public places.
- Protect children from secondhand smoke and help them stay tobacco-free.
 - Kids are much less likely to smoke if their parents don't, so if you are a parent, make a plan and quit for good.
 - Support policies that reduce smoking and tobacco use in our communities—particularly in front of children.
 - Make smokefree cars—especially when children are present—the expectation.
 - Make sure our schools have strong tobacco-free policies that are enforced.
- Increase the number of smokefree spaces in our communities, including outdoor spaces such as parks, concerts and community events.
- Support funding for tobacco prevention.
- Respect and support smokers who are trying to quit.
- If you smoke or use tobacco, make a plan and quit for good. Eighty percent of smokers want to quit. It's tough, but it's possible to re-learn how to live without tobacco—and there's help that works.
- Ask smokers to respect designated smokefree spaces.

Additional Resources for You from Metropolitan Group

Trainings & Workshops

Metropolitan Group offers small and large group trainings, customized workshops and planning intensives on a wide range of topics, including:

Advocacy

Marketing Communication

Multicultural Communication

Public Relations/Media Relations

Public Will Building

Resource Development/Fundraising

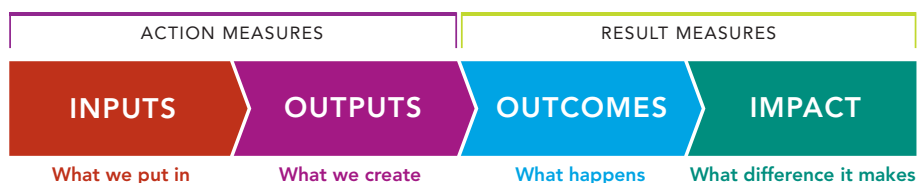
Strategic Planning

Building capacity for the world's change agents.

Measuring *what* Matters

Measuring social change, from the actions we take to the results they generate, allows us to determine what's working and what's not, and to make the modifications required to align our human, financial and political capital in pursuit of that change.

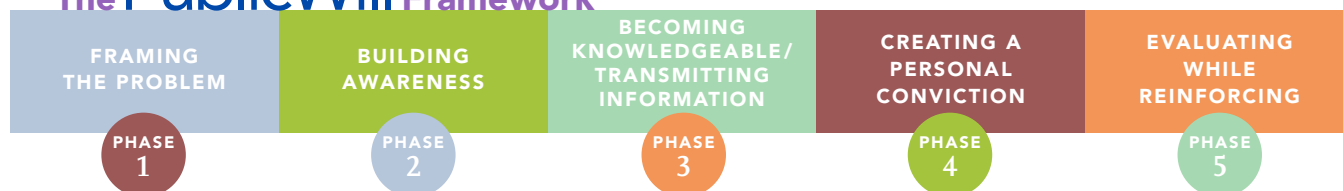
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Download our article on **The Public Will Framework**, a process that creates lasting impact by connecting issues with closely held values and leveraging grassroots and traditional media strategies.

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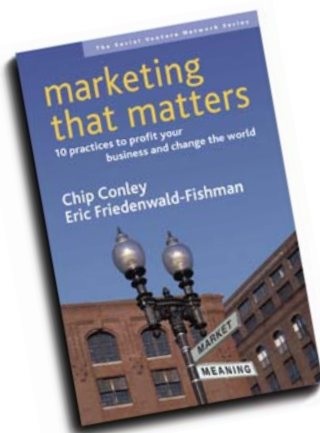
The PublicWill Framework



INCREASING **Relevance** | **Relationships** AND **Results**: PRINCIPLES & PRACTICES FOR EFFECTIVE MULTICULTURAL COMMUNICATION

Effectively engaging diverse audiences unlocks new resources and brings additional perspectives and talents to the table to develop innovative and sustainable solutions to our most challenging social, environmental and economic issues. Visit www.metgroup.com to download our article.

PRINCIPLE 1:	Check Your Assumptions at the Door: <i>Begin with yourself</i>
PRINCIPLE 2:	Understand the Cultural Context(s) of Your Audience: <i>Do your homework</i>
PRINCIPLE 3:	Invest Before You Request: <i>Create community-centered partnerships</i>
PRINCIPLE 4:	Develop Authentic Relationships: <i>Maintain a long-term perspective</i>
PRINCIPLE 5:	Build Shared Ownership: <i>Engage, don't just involve</i>
PRINCIPLE 6:	Walk Your Talk: <i>Lead by example</i>
PRINCIPLE 7:	Relate, Don't Translate: <i>Place communication into cultural context</i>
PRINCIPLE 8:	Anticipate Change: <i>Be prepared to succeed</i>



Marketing That Matters: 10 Practices to Profit Your Business and Change the World

The book on socially responsible marketing.

Metropolitan Group's Creative Director/President, **Eric Friedenwald-Fishman**, co-authored *Marketing That Matters* with Chip Conley, founder and CEO of Joie de Vivre Hospitality (www.jdvhospitality.com). *Marketing That Matters* is a practical guide to strategic marketing that helps large and small organizations improve their bottom line while advancing their values.

Published by Berrett-Koehler and translated into Spanish, Chinese, Japanese, Korean and Portuguese. Available at most local bookstores and at www.svnbooks.com, www.powells.com, and www.amazon.com.

Successful Advocacy

A VALUES-BASED APPROACH

Advocating for the advancement of key issues, for changes in policy and for increased funding of critical social, civic and sustainability initiatives must be based on community values and build upon strategic and creative communication approaches. Visit www.metgroup.com to download our article.





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Metropolitan Group crafts strategic and creative services that
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