Background

Through discussions with the Indiana Arts Commission, TrendyMinds sought to gain a better understanding of communications best practices and challenges specific to the nonprofit world. We recognized that many nonprofit organizations are asking: “What best practices can we utilize to create a strategic marketing plan which effectively communicates with, educates, and engages members, volunteers, and the community at-large?” To gain insights into answering this question, we decided to gather various nonprofit organizations for roundtable discussions.

Two discussion sessions were held in late March. Participants were chosen to get a mix of varying types of nonprofit organizations with different missions, sizes, structures, and more. Sessions were structured to allow participants to share their experiences, successes, and areas of improvement.

The goal of these sessions was to learn how nonprofits were using different communications tools and piece together best practices based on where nonprofits were having success. Notes from the two roundtables have been summarized in this document, in addition to best practices recommended by TrendyMinds.

Summary and Recommendations

Organizational Challenges

Lack of Resources
As participants discussed their challenges, a common theme was the need for more resources. Lack of time, budget, and human resources all affected our participants’ marketing plans. While these are not areas for which this document aims to provide recommendations, the recommendations regarding communications aim to make the most of the resources available and may lead to increased efficiencies which can lead to greater availability of time, budget, and human resources.

Institutional Knowledge and Processes
Another organizational challenge our nonprofits faced was institutional knowledge and a lack of documented decision making. The operations of nonprofits are so dependent on the people running them, that when someone leaves, all of their historical knowledge leaves with them. This can create unique challenges for communications, including presenting an inconsistent image and coming across as unorganized to constituents.
There are hundreds, if not thousands, of project management tools which can help remedy this and fit the unique needs of any organization. Online software as a service companies such as Basecamp, Trello, and Wrike all allow multiple users to assign and discuss tasks, set deadlines, and streamline workflows in an online workspace that documents progress and discussion, and allows projects to be archived and viewed later. Pricing varies based on desired features and number of users or projects, however many offer free plans.

Nonprofits also ran into challenges due to a lack of documented processes. For some of our participants, a simple social post could require signed release forms from photographed individuals, review from a proofreader, and approval from board members, among other things. Without processes like this on record, it can be difficult for anyone to get things done. Documenting these processes and workflows allows anyone in the organization to easily tell what different projects entail and what their role is. This also helps get new team members up to speed and minimizes the amount of institutional knowledge lost when a team member leaves.

**Target Audiences**

Defining and clearly understanding your target audience is a crucial part of planning communications. While larger nonprofits seemed to have well defined target audiences, smaller nonprofits struggled with this and had a less defined understanding of their audiences. Many nonprofits seemed to have a mix of the following audiences:

- Clients, or the people that are benefiting from the nonprofit
- Volunteers
- Donors
- Sponsors
- Supporters, who may sign up for news and attend events, but don’t volunteer or donate
- The general public

It important to understand each of these audiences and gain as much demographic and psychographic information about them as possible. Most smaller nonprofits had some deeper understanding of who their organizations served or benefited, but were less sure who donors, volunteers, and other audiences were. A good way to gain a better understanding of who your target audiences are is to have them answer questions as part of an onboarding process. If someone wants to volunteer, donate, or sign up for a newsletter, have them give you some information about themselves, so you can build a profile of what this target audience looks like. Another good way to collect this
information is to send quick surveys to constituents who you are able to contact via
direct mail, email, or social media.

It is also important to have an understanding of how each of these target audiences plays
a role in your nonprofit. Since they all serve different purposes, they all need to hear and
see different messaging to keep them engaged. For example, keeping the general public
informed of what your nonprofit is doing in the community is a different message and
goal than informing volunteers of an opportunity and motivating them to get involved.

Similarly, reaching these different audiences means using different channels. While
most of our participants didn't have specific breakdowns of which audiences responded
better to which channels, many did agree that when it came to generating donations,
direct mail was highly effective. There are many possible reasons for this — and it can
differ based on the organization — but one potential explanation is that older
demographics are more likely to donate to charitable causes but dislike donating over the
internet. Understanding correlations such as this is beneficial to developing
communications that reach specific target audiences with the right messaging through
the right channels.

2018 Goals

While all participating organizations were able to discuss, in-depth, their overall mission,
there was a significant drop in those who were able to articulate specific
communications goals for 2018. Finding the time to step back and formalize a marketing
strategy proved to be difficult for participants who were often juggling multiple roles and
keeping their organizations running.

Without clear, purposeful communications goals and objectives, communication from
participants didn't always project a consistent message, or tie back to organizational
goals. This becomes evident through sporadic posts on social media, not sending direct
mail or emails at optimal times, and organizations not being engaged at times when the
public would like to hear from them.

Organizations who do find time to create formalized, strategic marketing plans
experienced many efficiencies and benefits. This document is accompanied by a
template that can be used to create a strategic marketing plan. Below are some best
practices to help you fill out the template:

- Engage internal stakeholders in a marketing communications planning meeting.
  By involving all stakeholders, nonprofits can ensure a plan is in place that serves
  all areas of their organization as efficiently as possible. This also helps to
determine if a communications tactic’s purpose makes sense in the context of the marketing plan.

- Create a formal strategic marketing plan document. Putting a plan down on paper ensures that everyone in the organization is able to refer to it and understand their role in it.
- Make communications goals that are S.M.A.R.T (specific, measurable, achievable, relevant, time-bound). Creating measurable goals involves picking which metrics for success will be tracked, and how often. This makes it much easier to tell when progress is being made toward goals and when strategy may need to be adjusted to have a better chance to meet goals.
- Tie communications goals back to larger organizational goals. This ensures that communications goals are deliberate and not arbitrary. For example, if a larger organizational goal for the year is to increase awareness of what your nonprofit does, it might make sense to set a goal to increase social media following by a specific number.

**Current Channels, Usage, and Frequency**

While our participants used a variety of different channels for their communications, most of them did not utilize these different channels to reach different target audiences. As described earlier in this document, the communications preferences of different audiences can vary, and it is important to understand and craft your communications around your audience’s preferences. While some general audience guidelines are included below, your specific audiences on each channel may differ. Surveys and analytics tools will help you gain insights into your audiences and their communications preferences.

Most participants were missing out on a key opportunity to adjust their marketing communications strategy and messaging based on results and analytics. Many organizations looked at analytics, and in some cases reported results back to board members, however, the impact this had on adjusting communications strategy was often limited to posting more of what got the most likes on social media.

As our participating organizations discussed the communications channels they used, a common theme was and the limited ability to use paid advertising such as billboards, newspaper ads, radio, paid social media ads, and online display ads. While these channels ensure messaging reaches a large audience, for nonprofits, the ability to use these channels are severely limited by budget. When our participants did use these channels, it was usually through in-kind donations. Because of this, we will be focusing on more commonly used channels in this document.
Social Media
Our participating nonprofit organizations all viewed social media as an important part of their communications strategies. Social media provides nonprofits free tools to share their messaging and interact with their constituents. As a digital tool, it also provides the opportunity to collect data and analytics to help evaluate communications effectiveness and make adjustments.

For the channels listed later in this section, there are general best practices for frequency and timing of posts. These are generalizations based on the amount of impressions and engagement posts see based on what time they are posted. We have included some of these best practices in this document. However, it’s important to note that these will differ based on your specific audiences. Use these as suggestions and experiment with your posts to figure out what works best for your specific audiences.

It is also important to keep up with the latest design specifications for each social media network. Each social network is designed to allow users to submit images of specific sizes optimized for the layout of their site. Profile pictures, cover photos, and post images should all be cropped to fit the unique specifications of each social channel. Failure to do this can result in pixelated images and images not fitting in their allotted space on the page, which comes across poorly to followers.

Social Media Scheduling
One easy way to be more efficient with social media planning is to schedule posts in advance. Most of our participants scheduled posts anywhere from a couple of days to a month ahead of time. Live and same day posting will still be necessary, however, planning what you can in advance is a great way to see your overall social push and ensure your social posts have a variety of content. There are a number of different tools available to schedule content ahead of time. Some options are included in the “Tools” section of this document.

Social Media Content
While our participants were great with posting about events and things happening within their organizations, most struggled to find evergreen content to post when there weren’t events or issues driving timely content. This isn’t a challenge unique to nonprofits. Creating content to share can be difficult, expensive, and difficult to source.

In the case of nonprofits, posts that highlight volunteers, tell the story of their organization, and show the difference they make, are all content topics target audiences
want to see. Designing simple infographics and asking followers/constituents to share content are great ways to gather content that is relevant and can be shared year round.

Social Media Best Practices by Channel

- **Facebook**
  - While Facebook remains one of the most popular social media networks to use, it can be difficult to ensure your content makes its way onto followers’ news feeds. Facebook is constantly changing its algorithm that determines what content is served to users. This is a challenge most of our participants experienced. Some best practices for Facebook posting in 2018 are included below, but in general, Facebook’s goal is to show users content that provides value to them. Here are six fundamental best practices for Facebook:

  1. **Take advantage of Facebook video**
     Facebook video sees 135% more reach than an image. Facebook has several tools to make posting video easy, especially when using footage from a smartphone. You should also include subtitles in your videos as some users report that 85% of viewers do not play the sound (Sprout Social).

  2. **Keep posts short and specific**
     Using less than 80 characters in your post copy can see an additional 66% engagement (Sprout Social).

  3. **Know your target audience**
     Understanding your audience base is essential in knowing what content to produce to engage with them.

  4. **Post consistently and timely**
     Long pauses in activity can damage your audience engagement. Deciding to be consistent with activity on Facebook is choosing a realistic number of posts per week and sticking with it. Your audiences should begin to understand when your content is released and start to expect/anticipate viewing it. Also, experiment with the best times to post and be timely on the dates and times you see higher engagement.

  5. **Highlight and engage with customers**
     Facebook is no longer just a megaphone, it is a conversation. A key success with any platform is to focus on community management.
Take time to react and engage with other users on the platform. This community management will show your brand as involved and intentional.

6. **Understand your analytics**
   Analytics give information about what is working and not working about your social efforts and how to succeed with future posts. Facebook has a built-in analytics insight page, however in many cases, third party services offer a deeper level of insights and functionality.
   - Frequency: Every few days.
   - Optimal times for nonprofits: 10AM-5PM on weekdays.

- **Instagram**
  - Instagram is a great platform to share visually compelling content. A picture is worth a thousand words, and on Instagram it is important that your pictures look good and are interesting. For some, when managing a social media plan with limited amounts of time, it makes sense to focus on content for Instagram and then translate that content into posts for other platforms. No matter how you use Instagram, there are some best practices to follow to ensure your content is as effective as possible.

  1. **Carry over your overall brand guidelines to social.**
     Instagram is heavily focused on sharing beautiful content and staying consistent in visual aesthetic. When users see your Instagram content, it should be on-brand with the rest of your content.

  2. **Be involved in trends**
     Social is all about what is happening in the moment. When building your content calendars, leave room for one-off posts to stay relevant with current news/events.

  3. **Stay active in community management**
     Similar to Facebook, it is essential that your brand interacts with other users and brands to be a part of the conversation.

  4. **Encourage user-generated content**
     User-generated content is a great way to engage with followers and generate content for your organization. Encouraging users to create content and share it on their channel does three things: it expands
your reach, gives credibility, and provides free creative for your brand to re-post.

5. **Keep brand and personal presence separate**
   Even if your brand consists of a very small team, it is important to keep your nonprofit's page free of personal presence. This helps the brand stay true to its messaging.
   - Frequency: When necessary and beneficial to your audience.
   - Optimal times for nonprofits: 1PM-6PM on weekdays.

- **Twitter**
  - While some social networks use algorithms to place greater importance on the relevance of content over when it was posted, Twitter mixes relevant content in with a chronological news feed. This can be great for users who check for updates and news regularly, however it also means posts are bumped off of users' feeds much quicker than other channels. Because of this, certain industries and types of organizations tend to fare well on Twitter while others may not find it as beneficial. If your organization doesn't have frequent updates or content to post and repost, your message may get lost amongst the noise. Here are some tips to keep your posts on Twitter relevant and visible.

1. **Resize images for Twitter**
   This is true for all social networks, but for Twitter especially, where users are quickly scrolling through updates, it is important to size your images to each social networks image specifications. This ensures your image fits in the space allowed for it and can be seen in its entirety at a quick glance. A list of image specifications for different social networks can be found later in this document.

2. **Use hashtags**
   Hashtags are native and appropriate to use on Twitter. Adding hashtags to posts is an easy way to add your tweets to a bigger conversation. Similarly, search hashtags to find discussions relevant to your organization and reply to, favorite, or retweet posts to engage with users. It is useful to gather a list of hashtags that are relevant to your brand and keep them in a doc so you can easily access them for your Twitter copy.

3. **Retweet**
Similar to user-generated content on Instagram, you can stay active on Twitter by finding content that is relevant to your brand and retweeting it. Retweeting shows involvement in the community and is also a great way to gain followers.

○ Frequency: When necessary and beneficial to your audience, however when there is something you post, it should be re-posted multiple times throughout the day.
○ Optimal times for nonprofits: 11AM-5PM on weekdays.

- Snapchat
  ○ Snapchat can be a difficult platform to leverage effectively. The app itself is suffering from a shrinking user base and decreased usage due to design and functionality updates. The population who continues to use the app skews heavily toward a younger audience. Other limitations with Snapchat include its one-to-one, personal communication method, and the fact that the platform itself is built on the idea that content disappears after a set period of time. It is also difficult to get any metrics to gauge effectiveness aside from seeing how many people have opened an image or viewed a “story”. Paid Snapchat advertising works differently, however, there are questions about the effectiveness of that as well.

- LinkedIn
  ○ LinkedIn is a great platform for reaching professionals. For nonprofits, LinkedIn can be a useful platform to post updates and network with other nonprofits, business, and professionals who may support your cause. LinkedIn likely won’t be a channel where nonprofits spend the bulk of their time. However, staying semi-active on the platform and sharing major news is recommended.

- YouTube
  ○ YouTube has grown at an incredible rate and is no longer just the home for video hobbyists and home movies. There are many opportunities for your brand to succeed on the platform. However, success on YouTube is very reliant on cross promotion with other social media sites such as Facebook, Instagram, and Twitter. Your YouTube account will most likely not bring the most traffic to your site. However, it is good to be proactive and also post your videos on YouTube.

Direct Mail
Direct mail was used by almost all of our participating organizations. Purpose of the direct mail tended to be newsletters or fundraising. As a fundraising tool, direct mail was very successful for our participants. Aside from having a clear call-to-action and a metric to gauge success (donations), our participants believed direct mail was reaching an older audience, which, in some cases, made up a large amount of the nonprofit's donor base.

Direct mail also appears to be an area where nonprofits can benefit from outsourcing or hiring a company to handle direct mail campaigns. For some nonprofits, direct mail donations can make up a large percentage of their donations each year. Companies with a focus on direct mail have years of experience, large amounts of previous projects to pull best practices from, and efficiencies that aren't available to those handling this in-house. Direct mail is a labor intensive channel as well, meaning it takes time away from other important areas where nonprofits could be spending time. The cost to hire a firm to handle this can be high. However, in the case of one of our participating organizations, bringing direct mail in-house resulted in a steep decrease in donations.

Email
Email was another channel most of our participating organizations were using heavily. Paying for an email marketing service to manage email lists, send messages, and track open rate and other metrics was well worth the cost for most of our participants. A list of email tools is included at the end of this document, some of which have free plans or discounts for nonprofit organizations.

Our participants used email for regular newsletters and updates, campaigns, and targeted communications with specific audiences. With email, it is important to manage subscribe lists and be sure not to flood your subscribers’ inboxes with messages. Frequency should be enough to keep your audience engaged and informed but not so much that they unsubscribe or start ignoring your messages.

Email also offers the opportunity to personalize messages based on audience. Aside from newsletters, sending the same message to your entire subscriber list doesn't cut it anymore. Email marketing tools are making it easier to create email “journeys” which reach subscribers with emails more relevant to them. For example, rather than sending all registered event volunteers the same, generic message, you can send them personalized thank you messages with additional instructions. Email can be as sophisticated or as simple as it needs to be for your organization, however, a little personalization can go a long way.

Website
Websites are one of the first places constituents turn to for information about nonprofits. As online giving increases in popularity (growing 12% in 2017 according to Blackbaud), it
is becoming increasingly important for nonprofits to use their websites to tell their stories in compelling ways and create seamless user experiences. One of the most important factors to consider on a nonprofit website is the number clicks it takes to make a donation. This call-to-action should be easy to find for donors and the donation process should be as simple as possible. Similarly, if your organization’s primary call-to-action is something other than making a donation (volunteer, use resources, etc) it should be easy to figure out how to do so.

It is also important to consider how your website will look and function on mobile devices. With over half of all web traffic now coming from mobile devices, your site needs to look and function on mobile as well as it does on desktop. Further illustrating the importance of mobile-friendly websites is the increase in donations made from a mobile device. Twenty one percent of online donations were made on a mobile device in 2017.

Search engine optimization (SEO) is another important factor to take into account with your website. SEO is structuring website content in a way that optimizes your websites ranking in search results. Effective SEO is crucial in making it as easy as possible for people to find your website and for increasing organic traffic.

**Text Messaging**
SMS or text messages weren’t heavily used by our participating organizations. Those who did utilize text messaging as a communications channel primarily used it to communicate with “clients,” or the people their organization benefited, or as a tool for emergency contact at events.

Using text messaging as a communications channel will largely depend on the preferences of your audience. In the case of our participants, volunteers didn’t respond well to text messages. Since text messaging is a very direct and personal method of communication, overuse, or sending irrelevant messages can lead to your audience blocking your number or asking to be taken off of the text messaging list. Be sure your text message is something the recipient actually needs to know and benefits from receiving in such a direct channel. Sending a reminder to someone who signed up for a volunteer shift is something that may be beneficial to communicate through text message.

**Traditional PR**
Creating stories and announcements to pitch to the media was not something our participants did frequently or had success with. Those who did have success with it typically hired external firms with media connections to do this for them. While hiring an external firm increases the effectiveness of PR, this is something that can be handled in-house to some degree. This can be done for free by reaching out directly to media
contacts, or for some additional costs, software can be purchased to help identify media contacts and manage press releases.

**Tools**

Below is a list of common tools used by our participants, as well as some tools recommended by the TrendyMinds team. This list is intended to give you some tools to look into to find what may work best for your organization.

**Email**
- Salesforce Marketing Cloud
- MailChimp
- myEmma
- Constant Contact
- GovDelivery

**Customer Relationship Management**
- Salesforce
- Blackbaud

**Social Media**
- Buffer
- Hootsuite
- Cyfe
- SumAll
- Sprout Social
- Meltwater
- Social network native platform tools

**Design/Content Creation**
- VSCO
- TouchReTouch
- Canva
- Adobe Spark
- GIMP
- Pixlr
- TinyPNG

**Text Messaging**
- TextMeUp
Event Management
- EventBrite
- SignMeUp
- The Registration System (TRS)

Donation Tools
- Mobile Cause

Website
- Google Analytics
- Squarespace
- Wix
- Wordpress

Content Monitoring
- Google Alerts

Data Collection
- Formstack
- SurveyMonkey

Project Management
- Basecamp
- Trello
- Wrike

Administrative
- Google Drive

Further Reading:
Social Media Demographics
https://www.spredfast.com/social-media-tips/social-media-demographics-current
Best Times to Post
https://sproutsocial.com/insights/best-times-to-post-on-social-media/
How Often to Post
https://coschedule.com/blog/how-often-to-post-on-social-media/
Image Dimensions For Social Media
https://sproutsocial.com/insights/social-media-image-sizes-guide/