



LIPMAN
HEARNE

Welcome

National Conference of Bar Foundations

— 08.2015 —

TOWARDS A BRAND FRAMEWORK

AGENDA

- 1 About Lipman Hearne
- 2 What's in a brand?
- 3 Case study: brand positioning for a Foundation
- 4 Brand messaging

BRANDING OBJECTIVES

1. **Generate greater communications clarity and concision**
2. **Create shared understanding about the organization, leading to strategic clarity**
3. **Build a durable framework for developing future messages**

THE 900-LB. GORILLA

Who, really, loves lawyers?

Like police, there's a fair amount of aversion or disdain until you need their services.

However, there are more jokes about lawyers than about cops.

What does this mean for the Bar Foundation community?

Who are the prospects who are likely to step up and fund Bar Foundation activities?

WHAT IS A BAR FOUNDATION, AND WHY DOES IT MATTER?

Each Bar Foundation exists to support its affiliated Bar

Philanthropic investments in the Bar foundation support the activities of the Bar

But what does the Bar do?

- Professional development
- Advocacy, public affairs and commentary, pro bono, civic good

And each Bar has a different definition of civic good

Chicago: Advocacy, delivery of legal services on behalf of the poor, Justice Entrepreneurs Project.

Monroe County: Telesca Center for Justice

Cleveland: “Civic player” in law-related education, diversity and inclusion programs, pro bono services

Florida: Greater access to justice, IOLTA funds, Innocence Project of Florida.

Ohio State: Improving public understanding of the rule of law and the administration of justice.

**INSTITUTION/ORGANIZATION = MEH.
IMPACT = HEY!**

“Numbers numb. Jargon jars. And nobody every marched on Washington because of a pie chart.” –Andy Goodman

It’s not about need, it’s about benefit.

People give to impacts—but their choice of impact areas is directed by self-interest.

Storytelling sticks.

Understanding your brand, and its value to your stakeholders and prospects, is the first step in developing strong philanthropic messaging.

TYPICAL WORK PLAN



WHAT'S IN A BRAND?

THIS IS A PRODUCT.

a product is not a brand.





THIS IS A LOGO.
a logo is not a brand.



This is a brand.

*it's the **EPITOME** of shared
perception.*

*it's the **PROMISE** of an experience.*

GREAT BRANDS ARE BUILT ON GREAT EXPERIENCES

In a world where brands dominate, products and services are no longer bundles of functional characteristics but rather means to provide and enhance experiences. All stakeholders—members, grantees, policy makers, community leaders, staff—have earned a unique brand perception based on what they expect from you, how they believe they were or are treated by the organization, how they believe the promise you made to them was or was not kept.

Each of your audiences has a set of fundamental beliefs about your organization, based on a complex set of inputs that create an expectation of the experience that the individual will have. Great brands resonate in the mind. They set up an echo chamber in which the brand promise reverberates with the values, needs, and expectations that people hold for the brand. And a well-managed brand combines brand messaging and lived reality that becomes powerfully defining for the individual, the group, and the Foundation itself.

WHY BRAND A FOUNDATION?

The advantages of a strong, focused and valued brand are hard to overstate. A clear and strong brand for your Foundation can:

- Be a “badge” for associated Bar members and grantees
- Provide clarity to prospective donors and grantees
- Establish an expertise platform for leadership
- Give focus for media inquiries
- Provide a framework for facts and stories
- Make the Foundation relevant to peers

1a

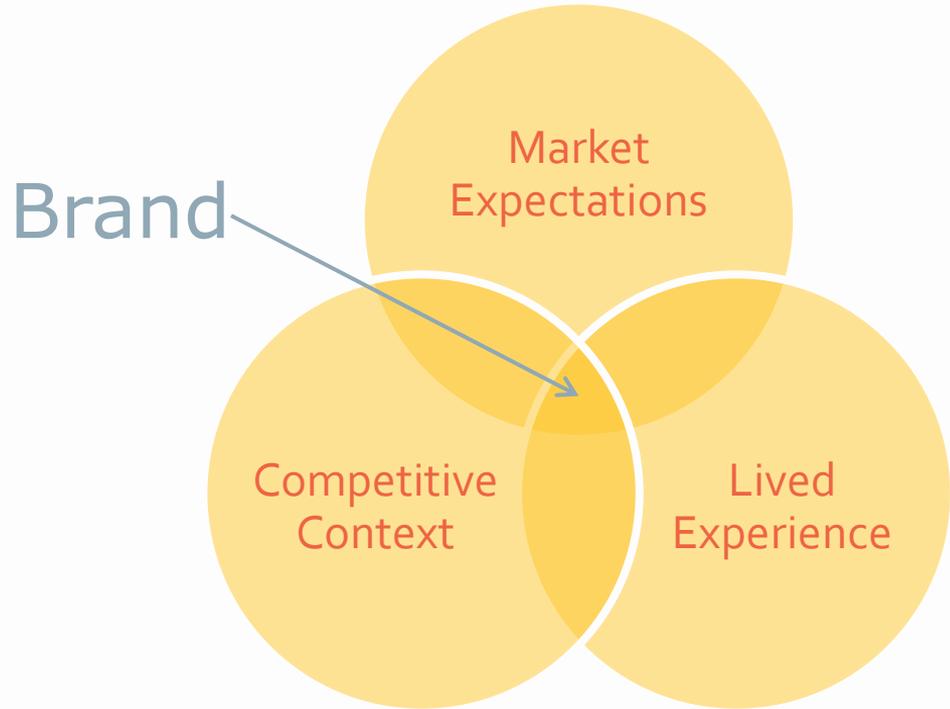
**SO, HOW DO WE
DEFINE YOUR BRAND?**

BRAND VENN

Who else is active in your “civic good” space?

What do you think know of or expect from your Foundation?

How well does your Foundation deliver on the promise it makes?





“Brands are built on what people are saying about you, not what you’re saying about yourself.”

Kawasaki

THE ROLE OF SOCIAL MEDIA

Social media, in general, is less about solicitation and more about cultivation (unless you are ALS...)

- Creating a background “buzz”
- Allowing individuals a means to attach themselves to your activities/impact
- Stimulating robust dialogue
- Listening in

CHANNEL SNAPSHOTS

Which do you use personally? Professionally?

- Facebook: social, sentimental, community-building
- Twitter: 140 characters of info, opinion, outrage, humor
- LinkedIn: job search, professional network, IP circulation
- Instagram: visualization, community, collage
- Vine: six-second vignette
- Snapchat: quick connect, flirt, sexting

What is most relevant to your Foundation?

START BY LISTENING

- **Sentiment, engagement, and response on social media**
 - What are people saying about you?
 - Likes vs. comments or shares; favorites vs. retweets; links vs. personal outreach
- **Direct research**
 - One-on-one interviews
 - Discussion groups
 - Focus groups
- **Internal assessment vs. external perceptions**
 - What distinguishes your Foundation?
 - Who else is seen as active in your space?
 - What are your challenges and opportunities?
- **Develop a brand-based SWOT analysis**

THE BRAND PLATFORM

- Consolidates understanding of the brand
- Connects with core values of the Foundation
- Provides filter/guide by which to evaluate programming and the ongoing presentation and expression of the brand
- Enables constituents and stakeholders to have a shared view of the Foundation brand

BRAND PLATFORM “BUILDING BLOCKS”

1 MISSION: the fundamental focus of the institution

2 POSITIONING: A clear understanding of where we stand relative to other organizations and to our audience’s knowledge and expectations

3 PROOF: the verifiable assets and attributes that enable us to claim that positioning

4 PLEDGE: the sustaining beliefs and values that motivate us

5 PERSONALITY: the face we show the world

6 PAYOFF: the reward that our stakeholders derive from their affiliation

BRAND PLATFORM

- Captures and portrays elements of the brand
- Provides snapshot of how elements of the brand build on each other and interact
- Functional elements
 - Mission
 - Positioning
 - Proofs
- Emotional elements
 - Pledge
 - Payoff
 - Personality
- Strategic driver
 - Big Idea



BRAND POSITIONING FOR NORTHWEST AREA FOUNDATION

INTRODUCTION

- **NWAF focused on eight-state region**
- **1990s and onward focused on alleviating poverty**
- **2008 strategic plan clarified/expanded range of grant-making programs**
 - Increase assets/wealth among low-income people
 - Increase capacity and leadership to reduce poverty
 - Develop policy solutions to reduce poverty
- **Strategic refocus requires brand redefinition**

MISSION

Fundamental to all aspects of the brand is the Foundation's mission. Marketing that does not advance the mission is irrelevant and wrong. The mission is a visible presence that will reassure marketing skeptics that your branding initiative is focused on achieving goals that they endorse, and it will act as a visible reminder to all involved in the effort that, in the end, it's not all about ads or taglines; it's about fulfilling Northwest Area Foundation's mission. Condensed, the NWAFF mission statement is:

The mission of the Northwest Area Foundation is to support efforts by the people, organizations and communities of our eight-state region to reduce poverty and achieve sustainable prosperity.

POSITIONING

The role of positioning is to articulate what differentiates the Foundation from similar organizations and where it fits within the category of grant-making foundations similar to NAAF. Through a comparable brand and messaging audit of selected foundations and based on learnings from interviews and focus groups, NAAF can stake a claim to be:

An organization driven by data, dialogue, and the belief that people and communities can prosper through knowledge, effort, and stubborn determination.

PROOF

Proofs are the validating points—the evidence that the positioning statement is supportable. Proofs are definitive and verifiable; they are demonstrable assets of the brand inherent in the institution.

- Nearly eight decades focusing on issues of poverty and prosperity in a region that encompasses urban, rural, suburban, and tribal communities
- Authentic personal and professional engagement/experience with poverty issues
- Willingness to learn, adapt, and build relationships

PLEDGE

The pledge is the promise we make to the stakeholders, constituents, and publics with whom we interact. This is particularly important in experiential brands—brands that are lived every day by people interacting with one another through the brand.

We will work alongside our partner communities as they build prosperity on their own terms.

PAYOFF

The payoff is the benefit of belonging, what the individual derives from involvement with the brand—a benefit that, property nurtured, can evolve and accrete new dimensions to last a lifetime.

Isolating this payoff is central to the development of constituent communications, whether you're addressing prospective or current grantees, internal staff, Bar members, or the media. The emotional impact is great; it represents the primary motivation that interests prospects and policy makers in you, motivates them as they experience your institution, and fires their passion as they build a relationship with you.

“I stand up for people and their dreams.”

PERSONALITY

Understanding brand personality as an emotional expression of the brand is crucial to the creative process. Brand personality captures how the brand comes across, how it sounds, feels, tastes, and acts. Institutional personalities affect our perception of the institutions. And institutional personality influences both the nature of the people who want to be involved with them and the satisfaction they will derive from that involvement.

The champion of effective solutions.

THE BIG IDEA

The Big Idea offers a short-hand to the question: What is your brand all about? It is a succinct sound bite that resonates throughout the brand structure, striking a chord with the mission, positioning, proofs, pledge, personality, and payoff. IT IS NOT A TAGLINE, but the core understanding on which activities and communications are based. It acts a strategic driver, a fundamental understanding by which the organization makes decisions critical to its future. The Big Idea doesn't change from season to season, but it stands as a touchstone for all brand communications.

[Prosperity is possible for all.]



BRAND PLATFORM



KEY MESSAGING

HOW TO USE KEY MESSAGES

Key messages are the fundamental building blocks of a communications program. Not necessarily “go-to-market” language, they provide a framework for communications planning, selection of exemplar stories, incorporation into leadership speeches and presentations, and consideration of communications priorities.

For NAAF, key messages help to:

- Knit together features into narratives

- Create a distinctive frame for stories

- Articulate an institutional personality and world view

- Encourage audiences to “shake hands with the brand”—and continue the conversation

- Contain “common ground” for all audiences

- Provide a context for facts

- Impose the discipline of brevity and vernacular language (no windy “foundation speak”)

DERIVING KEY MESSAGES

Through extensive interviews with stakeholders, we determined a number of distinctive and important NWAf attributes, including:

- 1 Singular Focus
- 2 Collaboration
- 3 Earned Knowledge
- 4 Policy Engagement
- 5 Learning Organization

Key messages were shared with NWAf staff and leadership, refined, and tested to ensure that internal understanding was aligned with external perceptions.

NWAF MESSAGE MAP

We forge connections. NWAF believes that real, sustainable progress is made by people coming together to find common ground. We link organizations across geographies and disciplines in order, recognizing that our grantee partners have invaluable knowledge to share through their on-the-ground work in their communities.

Our resolute commitment to the region anchors us. Our past provides perspective as we move forward, helping us appreciate the strengths, as well as the challenges, within diverse populations. Our decades-long connection to Native American communities is well known, and positions us to engage in continued productive dialogue.

We seek paths to prosperity. Access to opportunity provides the difference between poverty and prosperity. Reducing poverty and building prosperity is what we do—and we do it by tackling the obstacles that keep individuals and communities from building value according to their own terms. We are fully committed to understanding and addressing the interlocking issues that have historically reinforced poverty and impeded prosperity for many in our eight-state region.

We welcome dialogue, channeling experiences and lessons learned toward helping to inform, influence as we advocate for policy changes essential to reducing poverty and building prosperity.

We continue to learn through our service in the region, remaining committed to gaining and sharing knowledge about insightful and effective responses to the underlying causes of poverty. And we approach the communities with an earnest desire to learn from them, hoping to apply that knowledge internally and share it externally—all in the interest of doing the most good.

Break-out Session

UNDERSTANDING YOUR BRAND

Your Foundation's brand is intricately linked to your Association brand.

For philanthropic support purposes, you must be able to distinguish between Foundation and Association activities which are essentially for the personal/professional development of members, and activities that have a broader public/civic purpose.

Breakout assignment

- › Divide into pairs
- › Individually, identify the primary “civic good” activity of your organization—either directly sponsored or implemented through the Association
 - › Write 2-3 sentences about the issue that your civic good activity addresses
 - › Write 1-2 sentences about your organization's approach to that issue
 - › Write 2-3 sentences based on the personal story of an individual your work has assisted

Read your sentences to your partner, who will be prepared to comment on:

- › Clarity of issue
- › Connection between issue and organizational response
- › Alignment and impact of personal story

Switch roles and repeat

BRAND STORIES

“Numbers numb. Jargon jars. And nobody every marched on Washington because of a pie chart.” –Andy Goodman

How well were you able to express your Foundation’s distinction/purpose through this exercise?

How did your partner respond to your brand story?

What will it take for you to be able to more fully “flesh out” your brand? What stories would you like to be able to tell? How can you get access to those stories?.

How will those stories affect your philanthropic messaging?

BECOMING A BRANDED ORGANIZATION

Through use of branding process and the tools it provides, your Foundation can reinforce understanding both internally and externally of its brand.

The brand will evolve and gain power as people take it to heart and allow it to inform and guide their actions. And as it's absorbed and endorsed internally, external stakeholders will come to know and trust the Foundation as being true to itself and to its multiple audiences.

Brand clarity will allow them to align their interests with the Foundation's concerns and programs. And when they wear your badge proudly, and animate your brand with their ideas and enthusiasm, the Foundation brand can truly be said to have inhabited the "sweet spot" between mission and markets—the spot where a robust brand can live up to its fullest potential.

A blurred background image showing several people in a meeting or office setting. The people are out of focus, and the overall color palette is a soft, muted blue and purple. The word "DISCUSSION" is overlaid in the center in a large, bold, black font.

DISCUSSION

A blurred background image showing several people in white lab coats, likely in a medical or laboratory setting. The focus is on the text in the foreground.

THANK YOU