Champions
With a Cause
The Nonprofit Board Member’s Role in Marketing


by Gary J. Stern
**Mission**
Our mission is to foster effective risk management practices and the overall development and advancement of nonprofits through unique, creative initiatives.

**Ten Things Series for Nonprofit Boards**
Welcome to this series of short briefing papers for nonprofit board members. Whether a seasoned leader or first-time trustee, there is a continual need to revisit the expectations and demands of the critical board member roles in steering, supporting and safeguarding nonprofit organizations. In this series, First Nonprofit Foundation has identified topics of particular interest to board members and will provide digests of time-tested wisdom, emerging thought, and the insights of highly experienced practitioners. We trust these papers will succeed in helping nonprofits to develop and advance. As always, we welcome your comments and suggestions.

**Booklets in this series**
*Advancing Together: The Role of the Nonprofit Board in Successful Strategic Alliances*
*A Winning Board: Steps That Bring Out the Best*
*Champions with a Cause: The Nonprofit Board Member’s Role in Marketing*
*Strong Partners: Building an Excellent Working Relationship between the Nonprofit Board and its Chief Executive*
*Evaluating the Executive Director: Your Role as a Board Member*
*Finding the Opportunity in Economic Chaos*
*Fundraising: A Partnership between Board and Staff*
*Essential Keys to Nonprofit Finance*
*Risk Management: Your Role as a Board Member*
*Shaping the Future: The Board Member’s Role in Nonprofit Strategic Planning*
*Sustaining Great Leadership: Succession Planning for Nonprofit Organizations*
In the vast majority of nonprofit boardrooms, the debate over whether marketing is important and appropriate for mission-based nonprofit organizations is over. There is now widespread understanding that every nonprofit organization, from soup kitchen to symphony to synagogue, must employ effective marketing practices to reach ever-changing target audiences, build relationships, and gain the response, resources and support necessary to sustain the cause.

Marketing is an age-old practice which has evolved as a proven modern discipline that produces measurable results. Its purpose is to create mutual exchanges of value and, while there are specialized roles, marketing is everyone’s job in organizations seeking to grow and succeed. In a 1991 Harvard Review of Business article titled “Marketing is Everything,” Regis McKenna wrote, “Marketing today is not a function; it is a way of doing business. Marketing is not a new ad campaign or this month’s promotion. Marketing has to be all-pervasive, part of everyone’s job description, from the receptionists to the board of directors. Its job is neither to fool the customer nor to falsify an image. It is to integrate the customer into the design of the product and to design a systematic process for interaction that will create substance in the relationship.”

Nonprofit leadership produces visions that often run ahead of what others believe is possible. A protected planet. An end to hunger. Loving care for all children. Education, art, and faith that enoble the spirit. As curators of such visions, the nonprofit marketing task is great.”
Board members have distinct governance and support roles in nonprofit marketing. Working together with staff, board members should:

- Root all marketing decisions in the mission and the best interests of the organization’s “primary customer”: those whose lives are changed through your work.
- Develop governance policies that encourage and guide marketing.
- Strive to understand and balance the needs, wants, and aspirations of the organization’s multiple target audiences.
- Exercise care in developing and protecting the organization’s “brand.”
- Require and monitor marketing goals as part of annual operating plans.
- Develop clear expectations and accountability for board members’ individual marketing roles:
  - Setting a leadership example through financial, in-kind, and volunteer support.
  - Making connections and gaining pro bono (donated) marketing services in the community.
  - Providing marketing guidance and support through committees and task forces.
  - Being active champions of the cause as “marketing representatives” for the organization.

Nonprofits have adapted much in the way of proven marketing practices from the business sector and infused them with the ethics and values of nonprofit organizations. “Social marketing” is a distinctive hybrid that has developed out of the nonprofit and government sectors and is a specialization within the larger arena of nonprofit marketing. Dr. Alan Andreasen, Professor of Marketing at Georgetown University and a leading voice in nonprofit marketing, explains, “The goal of social marketing is to change behavior, particularly problem behaviors. Social marketing is a powerful tool for persuading people to stop polluting, adopt healthier diets, engage in family planning... It is essentially a method for achieving social change.”

Many nonprofits pursue social marketing goals and all—whether formally or informally—engage in marketing their organizations, which is the focus of this booklet.

Nonprofits that integrate marketing in a comprehensive manner:

- Determine and support clear roles for board members and staff.
- Integrate marketing planning with program development, fundraising, volunteer management, and all other areas in which the organization might seek exchange relationships.
- Define the organization’s target audience audiences and learn directly from customers about their needs, wants, and aspirations.
- Shape what the organization offers to provide benefits that are valued by its audiences.
- Reach out consistently over time with media and messages that convey “the brand” and motivate target audience members to respond.
• Use marketing research at every step.
• Evaluate and learn from their marketing efforts.

The major reasons people join nonprofit boards are belief in the mission, a desire to give back, and an interest in sharing and developing their knowledge or skills. As champions with a cause, board members’ roles in marketing can, in themselves, provide a deeply satisfying exchange of value. The following ten roles will help you fulfill your duty as a champion for your organization:

1. Understand your mission and “primary customer”
2. Make marketing policy
3. Tread carefully with “the brand”
4. Require and monitor marketing goals as part of annual operating plans
5. Have clear expectations for board members’ supportive roles
6. Be an ambassador
7. Open doors
8. Be a cultivator
9. Ask!
10. Be a champion

1. **Understand Your Mission and “Primary Customer”**

The central governance roles of every nonprofit board are to define the mission and to hold themselves and the staff accountable to bring to life the most inspiring vision for the organization and the change it can create in the world. Internationally acclaimed management expert, Peter F. Drucker, embeds marketing with mission in his “Five Most Important Questions” for nonprofit organizations: “What is our mission? Who is our customer? What does the customer value? What are our results? and What is our plan?” Answering these five questions through strategic planning helps boards focus on who must be reached and at what scale in order to advance the mission and make a significant impact in “changed lives and changed conditions.”

Contemporary boards appreciate not only the simplicity of Drucker’s questions, but how complex it is to answer them. Clara Miller, president and CEO of Nonprofit Finance Fund, writes, “One of the primary jobs of many nonprofits is to provide vital services to people who can’t pay for them, or at least can’t pay the full freight. Especially in health and social services, a third party usually pays for the product on behalf of the consumer. Therefore, the lion’s share of nonprofit social service, health care, job training, housing, and similar organizations provide services to one consumer but are paid by another—or, frequently, by a dizzying array of others, including several levels
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2. Make Marketing Policy

“If you build it, they will come” sometimes holds true, but it’s poor policy. With the exception of feasibility studies for major capital projects, few nonprofit boards routinely require sound marketing research and sustainability planning before embarking on new ventures. Nor do most boards make well-thought out marketing plans with appropriate budgets a standard expectation of management. There are certainly unique constraints in the nonprofit world, but boards should recognize the investment = return philosophy that underlies successful commercial marketing and carefully craft policy that encourages nonprofit organizations to realize the benefits of proven marketing disciplines.

A board should also proactively develop policies that set appropriate boundaries on what a nonprofit will and will not do with regard to marketing. Such policies may address:

- Assurances that marketing activities reflect and appeal to diverse audiences, including language access for non-English speaking populations.
- The conditions under which a nonprofit will accept sponsorships or pursue “cause marketing partnerships” in which a business promotes a nonprofit cause or contributes earnings to it in exchange for use of the nonprofit “brand” in the business’s own marketing.
- Requirements for in-depth market analysis and transparent multi-year business plans before embarking on a “social enterprise” that is intended to produce revenue that exceeds expenses.
- Pricing structures to ensure that lower income audiences will be able to afford ticket prices, tuition, and other fees-for-services.
- The conditions under which a nonprofit may share or sell mailing lists or other marketable information about its clients, volunteers, or donors.
• Sensitivities that must be honored when seeking to feature program participants, volunteers, or staff in marketing materials.
• The links or advertising that a nonprofit would disallow on its website.
• Conditions under which a nonprofit will or will not share ownership of its “intellectual property.”

The Six “Ps” of Marketing

Nonprofit organizations often confuse marketing with communications, fundraising, or email blasts meant to promote upcoming events. That’s understandable, because those promotional activities are the visible face of marketing. But true marketing is at the core of every aspect of the organization. It is built around the idea that there is an exchange of value between the organization and its various constituents. The following framework, “The Six Ps of Marketing” gives a more comprehensive picture of what marketing is all about.

The Six Ps

Product: What does the organization offer to the communities it exists to serve? (A product does not have to be a tangible item; it can be a service or even an idea. Organizations may have many products.)

Publics: What individuals and groups do we make exchanges with?

Price: What do we ask for in the exchange? (This may be money, but it may be other items of value as well—services, goods, reputation, goodwill, and so forth.)

Place: Where do we make the product available, how do we distribute it, and how do our publics have access to it?

Production: By what processes do we create the product, service, or idea? Do we do so in a way that maintains the value of our product?

Promotion: How do we let our publics know about our brand and products and motivate them to respond? (Promotion includes not just mail, email, web, and phone activities but also direct selling.)

Here are six broad questions the board should consider when determining if the stars have aligned for good marketing of the organization as whole (or any of its products).

• Product: Are our products of high quality, delivering what our publics value?
• Publics: Have we clearly identified our various audiences and do we understand how we benefit them—what we do that they value?
• Price: Does the price of our product adequately express the value of the exchange, is it sustainable for us, and is it affordable for the specific audience intended?
• Place: Is our product easily available to the intended audience—is it distributed in a manner that reduces geographic, time, and other logistical barriers?
• Production: Can we meet the demand of our customers and do so in a way that is safe, fits with our organization values, and is economically sustainable for us?
• Promotion: Are we conveying the image we want in all our public faces, and do our actions adequately motivate our audiences to respond to us?
3. **Tread Carefully With “The Brand”**

A “brand” is the meaning and reliable promise that is associated with an organization, program, or product—its reputation. “Brand equity” is the sum of positive associations evoked by the organization, program or product and the number of people who hold—or can easily make—these associations. Because of the importance of brand equity and the fact that it takes many years to build it, any organization should be extremely cautious and strategic when developing or changing the brand.

A nonprofit board should exercise its governance role, in partnership with staff, when the board finds itself engaged in branding. This includes contemplating a name change for the organization or developing a name for the first time, as well as selecting or changing the organization’s logo, official slogan, or tagline. It is always advisable to engage the help of a highly qualified expert—whether paid or volunteer—who can guide the board and staff through a step-by-step process that ensures brand decisions are deliberated with care. A thorough well-structured approach will help to set clear expectations for what branding is intended to accomplish, weigh the costs and benefits of making a change, develop options, gather internal and external response to one or more preferred options, and assess the merits of proposed new names, logos, slogans or taglines against clear pre-established criteria.

Once decisions are made, consistency over time is essential to establish or build brand equity. “Powerful causes deserve powerful brands,” states Cynthia Currence of the American Cancer Society. “Branding should influence the entire organization, prompting staffers and volunteers alike to constantly reinforce and burnish the organization’s essence and identity. Consistency is not boring; it serves a critical orienting function for nonprofit customers and communities.”

4. **Require and Monitor Marketing Goals as Part of Annual Operating Plans**

Nonprofit strategic plans lay out broad goals and objectives for an organization’s long-term direction which often include overall levels of accomplishment in attracting response, resources and support. Marketing goals should be included in annual operating plans as specific time-limited targets for “how much of what by when”: how many people to be engaged in programs or classes, how many volunteers to be
recruited and retained, how many memberships to renew or add, how much money to be raised and earned through different streams, how many season subscriptions to be sold, how many attendees at a special event, and so on.

Because marketing goals are time-limited and numeric, progress and achievement is relatively easy to monitor. What is more complex is how far to “drill down” in developing goals and keeping an eye on performance. For example, a program may have an overall target for the number of people to be served and “drilling down” could mean tracking demographic diversity within that overall number. To keep in front of enrollment trends, an organization may watch the numbers, sources, and appropriateness of referrals; or the volume and geographic distribution of direct applications. A volunteerism goal could emphasize retention rates vs. recruitment—or vice versa. In the dollars raised category, targeted numbers of first-time donors and the migration of existing donors to higher levels may be important to follow.

In each case, marketing goals should support the organization’s strategic direction, reflect its values, appear ambitious yet attainable, have appropriate corresponding plans and budgets, and be visible to everyone. Then the board and management must decide what is worth watching. According to marketing luminary Philip Kotler, “Marketing is a learning game. You make a decision. You watch the results. You learn from the results. Then you make better decisions.”

5. **Have Clear Expectations for Board Members’ Supportive Roles**

Individual board members have a built-in marketing role as representatives of the communities a nonprofit serves and from which the organization derives its support. While no small group of people speaks for a community as a whole, the board’s composition should be a starting point to ensure the “voice of the customer” is present in every decision. Beyond this built-in role, there are a number of additional ways in which individual board members may be expected to support the cause.

**Board members are role models**

A board should have clear expectations of its members and a system of accountability regarding their financial and in-kind support through contributions, purchases, donations of goods or services, and being present at public events. All boards of nonprofit organizations that raise funds from the public should have a policy requiring that 100% of board members will give—each within his or her means. Similarly, there should be explicit and reasonable expectations for the other ways in which...
board members are expected to contribute. For example, an organization may expect board members to make a major annual gift, purchase tickets to performances or events (or simply attend), buy a seat or whole table at an annual fundraising dinner, donate items to an online auction, and so on. It should be clear how participation in one or a number of these ways satisfies board requirements and that members not feel “nickled and dimed” when doing their part.

**Board members have connections to resources**
Many nonprofit organizations depend on pro bono services to attract top talent for short-term projects and, on an ongoing basis, to help keep marketing costs as low as possible. In some cases, board members are recruited because they have certain positions or expertise and they or their firms or departments may directly contribute pro bono work in marketing research, marketing planning, media relations, web site development, copywriting, graphic design, and production of marketing materials and tools. Board members may also be asked to use their personal and professional networks to help connect a nonprofit organization with such resources.

A cautionary word on pro bono work: it is appropriate to look a gift horse in the mouth. When something is being offered free of charge, it’s a little delicate—but still essential—to negotiate deadlines, project roles, intellectual property rights, responsibility for out-of-pocket costs, and how ongoing communication and ultimate approvals will happen. If misunderstandings or problems arise, they should be addressed quickly and honestly.

**Board members provide guidance and support through committees and task forces**
Many nonprofit boards assign a range of marketing research, planning, and implementation roles to marketing or public relations committees or task forces. Examples of their roles include:

- Working closely with staff to set annual marketing goals, develop plans, and track results.
- Identifying what marketing work is best done by the staff, board, and volunteers, what should be outsourced, when pro bono work might be sought and from whom, and when paid consultants should be engaged.
- Doing the bulk of the branding work described earlier with key decisions brought to the full board at appropriate intervals.
- Designing a marketing research initiative, participating in carrying it out, and analyzing and reporting the findings.
- Taking charge of both planning and hands-on work for a special campaign or event.
- Creating or updating plans for a web site.

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5. **Have Clear Expectations for Board Members’ Supportive Roles**
As with all board committees and task forces, a group’s mandate and job description should be delineated. Board members and others from outside the board may be asked to participate, and the partnership roles of committees or task forces and the staff should be clearly spelled out.

**Board members are “marketing representatives”**

With good training, follow-up, and support, every member of every nonprofit board can champion the cause by reaching out and building exchange relationships as an ambassador, door-opener, cultivator, and solicitor. Following are role descriptions and tips-to-remember for nonprofit “marketing representatives,” all adapted from *Marketing Workbook for Nonprofit Organizations Volume II: Mobilize People for Marketing Success.*

6. **Be an Ambassador**

The nonprofit ambassador has the seed-scattering role. This job can be taken on by everyone associated with a nonprofit and simply requires willingness to represent the organization in the community—from the supermarket check-out line to the governor’s receiving line. Ambassadors are asked to be alert as scouts, identify prospects, learn about their interests, and pass contacts along for follow-up. And the more people who know the organization’s marketing goals and are on the lookout for potential participants and supporters, the better. Champions make the most of networking, often exchange business cards, and leave an informative and engaging impression whenever the subject of your organization or cause pops up.

7. **Be a Door-opener**

The nonprofit door-opener plays an in-the-wings role. Most doors will open when the right people ask. This role requires willingness to provide names and contact information for people the organization wishes to reach. Door-openers are asked to allow use of their names in making contacts, to send emails, sign introductory letters, make initial phone calls, and otherwise smooth the way. Which board members may be asked to open doors at particular times depends on the number and nature of the doors the organization needs opened. Champions make the most of their address books and prove the rule “it’s all about who you know.”
8. **Be a Cultivator**

The cultivator has the warm-up role. How many cultivators a nonprofit may need and when it may need them depends on the number and type of cultivation events called for in an organization's marketing plans. This role is generally taken on by a limited number of people and requires willingness to make personal invitations. Asked to host anything from visits to your organization to elegant dinner parties to breakfast at the local greasy spoon, champions make the most of their social and business circles and are happy to expand them on the organization's behalf.

9. **Ask!**

The solicitor is the person who makes the ask for funds. This is the critical bring-it-home role. Bi-annual studies by Independent Sector consistently show that people are far more likely to give or volunteer when asked. While initially uncomfortable for some, this role gains appeal in a can-do culture marked by motivational training, ongoing encouragement, and the necessary hand-holding and support. It requires interest in what others value and willingness to ask for commitments. The number of solicitors needed depends on the number of people to be reached one-to-one and how many “prospects” can be assigned to each solicitor—sometimes many, sometimes just one or two. Solicitors are asked to make direct contacts, take the lead in a request, and participate in follow-up as needed. The best among them are persistent and play the role with sincerity.

10. **Be a Champion (and Remember These Five Things)**

*It’s the mission*

In moments of shyness, discouragement, or if you’re just plain tired, think of the mission and imagine its positive impact in just one setting with just one person. Say to yourself, “Whether or not this happens depends on me.” Then take a deep breath and forge ahead.
**Make an impression that would impress you**
Learn everything you can about your organization. Read, ask questions, go on tours, observe programs or classes, attend performances and events, talk with your primary customers, volunteers, and donors whenever there is an opportunity, and get to know others who are involved. Reflect on what most deeply touches or impresses you. When you express that, your message will come through loud and clear.

**Think the most of people**
Marketing lore is rich with tales of prospects outperforming initial expectations. Avoid getting snagged by the “I’m-sure-they-can’t” syndrome. The last thing you want to learn is that someone would have said yes, or done more, if only they had been asked.

**Take “no” for an answer**
There are times when “no” means “not that much” or “not this time” or “never mind about the party, please come to the point.” Don’t be afraid to ask a follow-up question, but if the answer really really is “no,” then graciously accept it.

**Say “thank you”**
Early and often. Thank people for their opinions, for taking the time to talk with you, for coming to an event, for their consideration, for helping you along the way, for saying yes. Thank those who come through in big and small ways with equal enthusiasm. Thank yourself for all that you do for the cause.


**Endnotes**


7. Adapted from Stern, Marketing Volume I, (pp. 9–10).


10. Stern, Gary J., Marketing Workbook for Nonprofit Organizations Volume II: Mobilize People for Marketing Success (p. 50–51, 127–128), Fieldstone Alliance (Formerly a part of the Amherst H. Wilder Foundation), 1997

**Additional Resources**


About the Author

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