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Toolkit

Research Rules

**Why nonprofits should do their homework before communicating
with the public.**

By R. Christine Hershey & Andrew Posey

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Stanford Social Innovation Review
518 Memorial Way, Stanford, CA 94305-5015
Ph: 650-725-5399. Fax: 650-723-0516
Email: info@ssireview.com, www.ssireview.com

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Research Rules

Why nonprofits should do their homework before communicating with the public

BY R. CHRISTINE HERSHEY & ANDREW POSEY

When Dr. Susan Love, a renowned breast cancer doctor and author, first approached our nonprofit marketing firm in 2003, her foundation was at a crossroads. Small, little-known, and Santa Barbara, Calif.-based, it was not designed to raise the \$25,000,000 it would take to eradicate breast cancer – the foundation’s goal.

But what Love did have was a unique approach to the fight against breast cancer. A researcher herself, she was searching for ways to prevent the disease from taking root in the first place, rather than for a cure. Love was also a best-selling author who was often referred to as the “mother of the breast cancer movement,” and so had good name recognition.

Yet branding the Dr. Susan Love Research Foundation presented a daunting challenge. The world of breast cancer research has grown into a sprawling universe of more than 2,000 organizations, with everyone “thinking pink.” How could we attract donors to the Dr. Susan Love Research Foundation without undercutting other organizations’ work – work that many of its

donors were likely also to support?

This challenge illustrates a reality that nonprofits don’t like to talk about: While many work toward a common good, and share many goals, they also compete for money and attention. Nonprofits not only don’t talk about the competition, they also don’t do much to address it. In our recent nationwide study of nonprofits, for example, only 20 percent indicated that they know what their peers are doing to raise funds and awareness. And an overwhelming 90 percent said that they don’t conduct communications research at all.

These numbers reveal missed opportunities. We believe, and our work shows, that strong communications are in the best interest of both organizations and the people they serve. And yet most nonprofits skip the crucial first step of crafting effective communications: research. Research establishes how an organization is perceived. What is its niche, and how is it different from other, similar organizations? Are its publications highly valued? Does anyone actually read them? Is its Web site easy to navigate? Who are its donors? Do its direct-mail appeals touch their emo-

tions? By conducting basic, relatively inexpensive research, organizations do not have to guess about how best to communicate with donors, media, and beneficiaries. Instead, they can make informed decisions.

Surveying the Field of Donors

While the nonprofit world will probably never have a squash-the-competition, bottom-line mentality, it can still take valuable lessons from corporate America. For both, not being visible means going out of business. Visibility is hard to come by, since consumers are bombarded with more than 3,000 messages each day. And so businesses have to know exactly whom they’re trying to reach and how to grab their attention. For example, Procter & Gamble doesn’t market a particular product to “women” but to “married, second-generation Latinas between the ages of 35 and 40 with a household income of \$75,000.”

When we started working with Dr. Susan Love, we already had a sense of her core audience – women who had battled breast cancer, the people close to them, and people interested in women’s health issues. Many were readers of her best-selling “Dr. Susan Love’s Breast Book,” which is now in its fourth edition. But we needed not only to confirm these impressions; we also needed to learn how to attract and retain this audience as donors.

We first used surveys and informal focus groups to find out who the foundation’s donors were and what aspects of the foundation most interested them. Because bad research is worse than no research at all, we carefully targeted respondents whose opinions most mattered to the foundation, including donors, the foundation’s Web site visitors, and even the scientific research community.

R. CHRISTINE HERSHEY is president of Cause Communications, a nonprofit firm that helps other nonprofits develop successful brands and communication strategies. She may be reached at rchershey@causecommunications.org.

ANDREW POSEY is vice president of Cause Communications. He may be reached at aposey@causecommunications.org.

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In a preliminary online survey, we gathered simple demographic information like age and sex, while also posing deeper questions about interests and preferences. (Surveys can also be conducted via phone or snail mail.) We asked how often people visited the Web site, what they thought about Dr. Love's work in the breast cancer movement, and how they liked to be contacted. We also asked questions about giving patterns, such as "Do you support other breast cancer organizations?" Picking the right – or wrong – questions is a sensitive business and central to a survey's success, and we avoided specifics about giving amounts so as not to be too intrusive. (See sidebar for tips on survey research.)

We supplemented these surveys with informal focus groups – small numbers of carefully selected individuals who share their opinions in a moderated roundtable discussion. Our focus groups were asked about their thoughts and feelings about Dr. Love, her foundation, and breast cancer organizations in general. (See sidebar at far right for tips on focus groups.)

As expected, we found that Dr. Love appealed to people – especially women – on a deeply personal level. They considered her a bold pioneer, and therefore trusted, admired, and believed in her. In communications lingo, Love had a strong brand image.

Yet Love's foundation was not fully capitalizing on her brand image – not just her popularity, but her credibility. And so we began to feature Love's voice and personal touch in all communications. Because Love is a national figure, we also suggested that the foundation move to Los Angeles, where it could more easily command a national (instead of a regional) presence.

Survey Tips

Surveys are effective ways to collect quantitative data, which are numerical indexes of what people think. Quantitative surveys can provide statistical accuracy and often confirm hunches or expectations.

Question formats for surveys include multiple-choice, yes/no items, and rating scales, as well as brief, open-ended items.

- To maximize effectiveness, notify respondents by phone or postcard that a survey is coming. If the survey is about a particular publication, send a copy of the publication along with the survey, or include a photo of the cover in the survey as a reminder.
- Put the time into thinking up the right questions. Test questions on a small group to learn of potential problems before polling the whole audience. Avoid jargon that will make people feel put off or uncomfortable with their lack of technical understanding. For example, "Web site usability," "501(c)(3)," and "stakeholder" are not lay terms!
- On rating scales, use even numbers of response options. If a scale goes from 1 to 5 (where 3 is a midpoint), many people will use the neutral "3." But if the scale goes from 1 to 4, people will more clearly report their opinions.

Finding Focus With Focus Groups

Our findings further showed that women were confused about the differences between breast cancer organizations and didn't have a clear sense of where their money was going. They were very devoted to the groups they supported, though, and they often supported more than one. These findings told us that the Dr. Susan Love Research Foundation needed to be effective at differentiating itself from other breast cancer research organizations.

We once again used focus groups to help the foundation define its distinct niche: a small, nimble foundation that funds research on the healthy breast that would otherwise be neglected. We also used focus groups' feedback to articulate messages about the foundation's emphasis on prevention rather than on cures – messages that would simultaneously distinguish the foundation from other organizations and not undermine their work.

Having identified both Love's brand appeal and the foundation's focus, we

Focus Group Tips

Focus groups are a good way to collect qualitative data – open-ended reports about how people think or feel about an issue or organization.

- Pick a good moderator, preferably someone trained. The moderator's skills are crucial to a focus group's success.
- Questions should be open-ended.
- The ideal size of a focus group is 6 to 12 people.
- As a general rule, members of a particular focus group should be homogeneous or similar to encourage free exchange of ideas. It may be best to have separate focus groups for donors, volunteers, staff, and populations served.
- Consider the new trend of online focus groups, which eliminate one of the problems with traditional groups: having one member dominate.

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Research on a Shoestring Budget

- For less than \$50 in stamps and stationery, a survey can be sent to 100 people, asking for their feedback on a particular publication or direct-mail piece.
- Gather a dozen important constituents for an informal focus group on a new logo. Entice them with coffee, drinks, and snacks.
- Invest a few hours of staff time to call a targeted group of audience members to answer a phone survey.
- Create a chat room on the organization's Web site for constituents to exchange feedback.
- Convince a donor to underwrite a major quantitative research survey.

ing e-mail appeals to donors, and some on our team were sure that of the three e-mail appeals tested, a timely one about Valentine's Day would do better than one in which Dr. Love invokes a sentimental story about her young daughter. In fact,

then developed the foundation's visual identity – its logo, business cards, stationery, Web site, press kit, brochure, and newsletter. The Web site, for instance, features a picture of Dr. Love with quotes from her that explain the science of breast cancer and the need for the foundation's research. The logo is bold and edgy, an abstract rendering of a breast, and the site gives detailed information about Love's approach, speaking of how new technology enables an unprecedented look at healthy breasts.

Informal focus groups with some of Love's key audiences were again used to test the look and feel of the visual identity. Focus groups are particularly good at testing slogans and donor appeals, because they provide in-depth, open-ended information and do not require any complicated sampling techniques. They also save organizations from spending a lot of money on direct-mail campaigns or other expensive efforts without any sense of how people will respond.

Sold on Research

Without communications research, nonprofits' messages sometimes come across as garbled and needlessly verbose. As our friend and author Andy Goodman spoofed: If Nike were a nonprofit, its "Just do it" campaign would be "While an occasional disinclination to exercise is exhibited by all

age cohorts, the likelihood of positive health outcomes makes even mildly strenuous physical activity all the more imperative." Similarly, without research Dr. Love's foundation could have gotten lost in the clutter of breast cancer organizations and missed out on a chance to inform

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women about its unique approach to preventing breast cancer.

Instead, the foundation now employs the unique and venerated voice of Dr. Susan Love in all its communications. It also has a clear position as an innovative organization that funds research areas that are often overlooked. And it has tripled the amount of funds it raises in a single year, transforming itself from a regional breast cancer institute to a national research foundation.

A few times, communications research saved the foundation from missteps. For example, we were test-

ing e-mail appeals to donors, and some on our team were sure that of the three e-mail appeals tested, a timely one about Valentine's Day would do better than one in which Dr. Love invokes a sentimental story about her young daughter. In fact,

Love's story – in which her daughter tells her how important it is to end breast cancer before she grows up – drew significantly more funds. At the same time, research findings can sometimes displease donors. After conducting an informal survey about one of Love's local Santa Barbara fundraising road races, for example, we learned that the foundation's donors were divided: Some cherished the annual event, but others were "run out." The foundation elected to build a donor strategy less reliant on events, which disappointed some.

Overall, though, the Dr. Susan Love Research Foundation's experience demonstrates that an investment in communications research can more than pay for itself. We know how much pressure nonprofits are under to take shortcuts when it comes to producing communications. But to reach the right people with the right message at the right time, while getting the most bang for limited bucks, organizations simply can't skip crucial research steps – especially when good communications research doesn't have to be costly or complicated. (See sidebar above for how to conduct research on a budget.) Indeed, communications research can ultimately add to the bottom line, allowing nonprofits to get to do the work they actually do best. ■