



# Brand Evaluator

A Comprehensive Tool For Diagnosing  
Your Nonprofit's Brand and Marketing

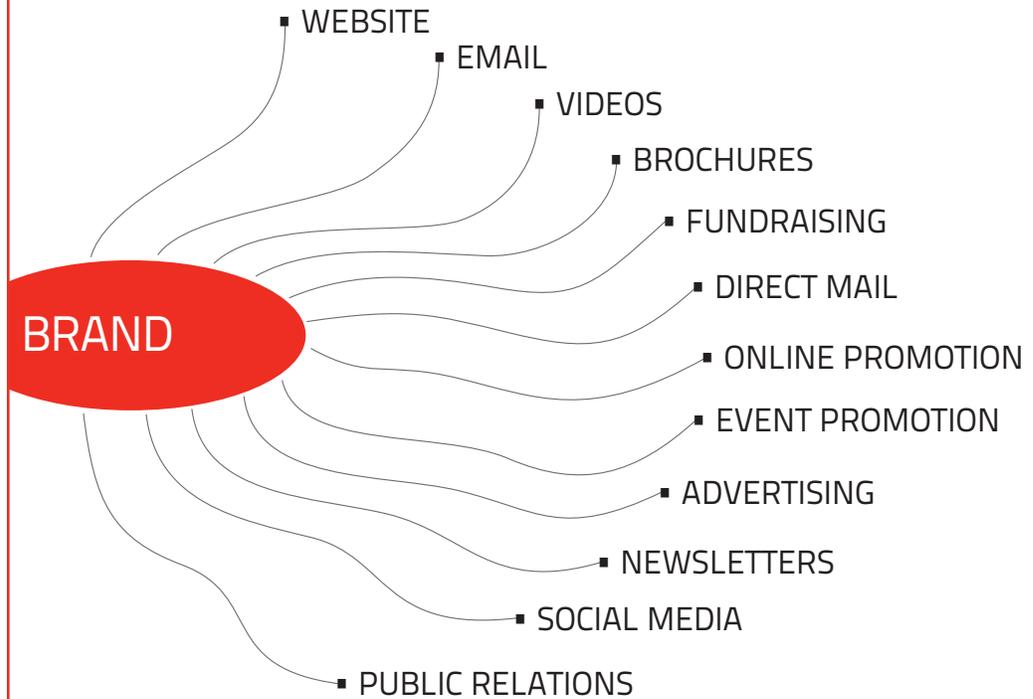
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 **redroostergroup**  
Wake up your brand!

If your organization is like most small and mid-sized nonprofits, you are doing your best when it comes to getting the message out about your organization. But often, you feel your efforts could be a lot better. Over time, your organization produces brochures, email newsletters, invitations for fundraising events, and other promotional materials. But how can you determine which are effective, and how can they be improved? And what if your organization faces more severe brand challenges such as a confusing name, a mission that is no longer relevant, or board members that can't tell your organization's story in a compelling way?



The Brand Evaluator will help you take control of all aspects of your brand.



This Brand Evaluator is intended to help. It can help you conduct a comprehensive assessment of how well your organization is communicating in all areas. With this tool, you can examine your agency's brand and all of its marketing materials to determine how professional, consistent, and accurate your marketing is. You can use these questions to identify your organization's marketing strengths and weaknesses so that you can improve what's working and fix what's not.

## Why Do You Need One?

Nonprofit organizations reach donors and other constituents in many ways, from their website, to email, to print communications. To instill credibility and inspire confidence, it is critical that these materials create a positive, professional impression and tell your organization's story in a compelling way. However, organizations often waste these important opportunities to forge connections with their audience.

### This Brand Evaluator can uncover:

- How to communicate your brand consistently.
- What messages are working.
- How to streamline your production process to save staff time.
- How to save money on printing and development.
- Where to best invest your fundraising budget.



## How To Use This Tool

You can use this tool in a formal way, by answering all the questions to develop a strategic marketing plan for your organization, or you can review the questions to get a idea of what areas you need to focus on. You can also use the Brand Evaluator to foster a discussion with your board, to engage your staff in marketing, or to enlist outside help. However you choose to use this tool, we hope you'll find it helpful. And if you do need help with your marketing, give us call.

# Marketing Checklist

A good place to start is with an understanding of what marketing and fundraising your organization is doing and what materials are produced.

1. Use this as your checklist to determine what materials you have (use ) and what you may need (use ).

2. Use the **Marketing Materials Inventory** on the next page to see what materials you have for each purpose and to assess which provide the greatest return on investment.

3. Assess the strengths and weaknesses of your marketing materials with the **Marketing Materials Assessment** on page 6.

## Strategic Documents

- Strategic Plan
- Marketing Plan
- Brand Manual
- Website User Guide
- Donor System Guide
- Event System Guide

## Written Content

- Mission Statement
- Vision Statement
- Brand Promise
- Brand Values
- Brand Attributes
- Brand Personality
- Boilerplate Language
- Grant Application Language
- Directory Listing Language
- Online Listing Language

## Logos

- Organizational Logo
- Division Logos
- Program Logos
- Sponsor Logos
- Social Media Avatars
- Other Logos
- Online Logo Archive

## Typography

- Typefaces
- Typeface Usage Guidelines

## Colors

- Colors
- Color Usage Guidelines
- Departmental Branding

## Photography

- Photography
- Illustration
- Image Archive

## Organizational Collateral

- Organizational Folder
- Organizational Brochures
- Program Brochures
- Flyers
- Posters
- Postcards / Rack Cards

## Program Collateral

- Program Brochures
- Flyers
- Mailers / Inserts
- Posters

## Business Forms

- Registration Forms
- Invoices, Statements, etc.

## Website

- Organizational Website
- Program Websites

## Stationery Items

- Email Signature
- Business Cards
- Letterhead
- Second Sheet
- Memo Sheets
- Note Cards
- Mailing Labels
- #10 Envelope
- 9x12 Envelope
- Envelopes (various sizes)
- Other Stationery Items

## Membership Materials

- Membership Brochure
- Renewal Forms & Invoices
- Membership Card
- Welcome Kit

## Fundraising Materials

- Fundraising Brochures
- Solicitation Letters
- Direct Mail
- Annual Appeal
- Capital Campaign
- Event Marketing
- Planned Giving Materials
- Sponsorship Information
- Fundraising Advertising
- Email Marketing

## Publications

- Annual Reports
- Magazines, Journals
- Newsletters
- Policy Reports
- Books
- Educational Materials
- Other Publications

## Email

- Email Newsletters
- Email Alerts

## Presentations

- Clients
- Donors
- Partners, Others

## Event Promotion

- Invitations
- Flyers
- Email
- Online Registration

## Signage

- Exterior
- Interior & Bulletin Boards
- Sponsor Recognition

## Uniforms

- Shirts
- Jackets
- Hats
- Name Tags
- Other

## Vehicles

- Delivery Vehicles
- Vans & Trucks

## Promotion

- Posters
- Online Marketing
- Premiums

## Advertising

- Print Advertising
- Online Advertising
- Broadcast Advertising
- Outdoor Advertising
- Other Advertising

## Social Media

- Facebook
- LinkedIn
- Twitter
- Flickr/Picassa
- YouTube
- SlideShare
- Other

## Videos

- Client
- Donor
- Other

## Public Relations

- Media Kit
- Media Lists

## Production Request

- Materials Request Form
- Print Quote Request
- Production Checklist



# Marketing Materials Assessment

	Item #1	Item #2	Item #3	Item #4
<b>Message</b>				
Is the audience and the purpose of the piece clear (does it educate, inform, motivate, persuade, etc.)?				
Is there a compelling headline or message that appeals to the audience?				
Is the content relevant to their needs?				
Is the message compelling (evoke an emotional response, inspire to action)?				
Is the length of the text appropriate / not too long?				
Is the text easy to read (are there subheads and callouts)?				
Is the language and tone appropriate for your organization's personality?				
Is the copy free from grammatical and typographic errors?				
<b>Call to Action</b>				
Is it clear what action the reader is supposed to take?				
Is it easy to take that action?				
Does the item include the relevant contact information (phone, email, website, addresses, etc.)?				
Is there consistency in the way the contact information is treated across all materials?				
Are there links to your social media and email newsletter sign up?				
Is there a form or reply card or envelope if necessary?				
<b>Design</b>				
Does the design look professional?				
Does the layout make sense? Is it clear what to focus on? Is there enough white space?				
Can the reader easily find the information they need?				
Are the appropriate images used to convey the message?				
Do the images and graphics evoke an emotional appeal?				
Are the images professional, well lit, cropped appropriately, and /or retouched?				
Do images have photo captions?				
Is the typography consistent (restrained use of fonts)?				
Are your logo and tagline included?				
Are the appropriate sponsor logos and disclaimers included?				
Are logos used in a consistent way with your other materials?				
Is the design and content consistent with your other materials?				
Does the item represent your brand well?				
<b>Production</b>				
Do the production qualities represent your agency in the best way possible? (quality paper, good printing, accurate folding, etc.)?				
Was the cost of producing the item appropriate?				
<b>Results</b>				
Has it been distributed effectively to its target audience?				
What results has this item achieved?				

# 1. Organizational Info

## A. Key Information

- Name of Organization:
- Website:
- Address(es):
- Mission:
- Key Programs:
- Year Founded:
- Revenue:
- Revenue Sources (indicate percent of each):
- Has revenue been increasing, decreasing, or remained steady over the past 5 years? 10 years? By what percent?
- What accounts for the increase or decrease?
- Is your organization independent, a parent, a chapter, other?
- Are you the parent organization or a chapter?
- Does your organization have chapters? If so, how many?
- Is your chapter autonomous or does it take direction from the parent organization?

## B. Organizational Readiness

- Is your mission clear?
- Do your organization's programs and decisions follow your mission?
- To what extent are the services the same as or similar to those that your organization offered three years ago?
- Does your organization have a Strategic Plan? When was it developed?
- What time period does the Strategic Plan cover? Is it being followed?
- Do you have a Marketing Plan?
- Who developed it? Who is responsible for overseeing it?  
Is it being implemented?
- What are your top 3 organizational goals?
- What are your marketing goals and priorities?
- Do you know how much you spend on marketing during your fiscal year?
- How much confidence do you have in your overall marketing?
- What do you need the most help with?
- How would you characterize your organization's ability to adapt to change?
- Does your brand have any mandates?  
(Sponsor logos, legal disclaimers, etc.)

### C. Leadership and People

- Have there been any changes in leadership lately?
- How many years has the Executive Director been in that position?
- What are you doing to nurture the next generation of leadership?
- Describe your board and committee structures.
- How many people are on your board?
- Average age of board member?
- Does your organization have term limits? What are they?
- Does your board have giving requirements? What are they?
- Is your board able to clearly articulate what your organization does?
- Who is involved in creating your marketing and fundraising?
- Who determines your marketing and fundraising goals, priorities and budget?
- Who is responsible for overseeing and monitoring your marketing and fundraising?
- What are their particular expertise, training and skills as they relate to their jobs?
- Is someone assigned to serve as a spokesperson for your organization?

### D. Marketing Consulting Experience

- Have you worked with a designer or a consultant before?
- What was that experience like?
- What expectations do you have for working with a consultant or designer?

### E. Audience

- Who are your key stakeholders?
- Are your prospective donors aware of your organization?
- What perception do they have of your organization? Are these accurate?
- Have you conducted any research on your target audiences?
- When was the last time you conducted a customer satisfaction survey?
- When was the last time you conducted a donor needs questionnaire?
- How do you collect data about the needs of your donors?
- What motivates your donors to give to your organization?
- What else do you know about your donors?

### F. Competitors

- What organizations do you compete with for clients? For donors?
- Is your organization confused with any other entities?
- Can you identify your competitors' strengths and weaknesses?
- What organizations do you consider to be your partners? In what way?
- Do you do any joint marketing?

## G. Key Forms of Communication

- What forms of marketing does your organization do?  
(See the **Marketing Checklist** on page 4.)
- What types of brochures or publications does your organization have?
- Does your organization have an online newsletter?
- Do your website, brochures and newsletters look like they come from the same organization?
- Does your organization do any public relations?
- Has it been featured in any websites or publications?
- Do you have lists of media outlets? Who handles that?
- Do you have any systems or templates for producing your marketing materials effectively and efficiently?

## 2. Identity

### A. Name

- Has the organization's name changed?
- Describe the history of your organization's name.
- Is it clear what the name of the organization? Is there more than one version of the name in use?
- Does the name represent what your organization does?
- Does the name indicate the audiences served?
- Does the name distinguish your organization from your competition?
- Is there confusion between the organization name and the program names?
- Is the name short? (If you refer to it by its initials, it is too long.)
- Is the name easy to spell and pronounce?
- Does the name avoid any outdated or politically incorrect terms?
- Does the name allow your organization to expand services and geographic scope?
- Does the name inspire confidence or evoke other positive emotions?
- Does the name have a positive connotation?
- Does the name suggest something that people can imagine?
- Does the name have a metaphorical meaning?
- Does the name appeal to your audiences?
- Does the name translate well into other languages (if appropriate)?
- Is the name easily confused with that of another organization?
- Is an appropriate URL available?
- Are there any legal issues with the name?
- Is the name legally protected?
- Does the organization have any other intellectual property (legally protected names, logos, taglines, etc.)?

### B. Tagline

- Does your tagline enhance or explain your organization's name?
- Does the tagline convey your nonprofit's or program's impact or value?
- Is the tagline memorable, avoiding common words and clichés?
- Does the tagline avoid industry jargon?
- Is the tagline short (less than 8 words)?
- Is the tagline used consistently on your print, online, marketing, and most communication materials?
- Does the tagline make an emotional connection?
- Does the tagline reflect your brand personality?
- Is there more than one version of the tagline in use?
- Is the tagline legally protected?

### C. Logo

- Does your logo convey your mission, services, or impact?
- Does the logo distinguish your organizations from other organizations (does it have a unique look)?
- Does the logo convey a sense of hope or positive emotion?
- Does the logo match the personality/tone of your organization?
- Does the logo look current and not dated?
- Is the logo memorable? Does it involve the viewer in some way?
- Does the logo look professional and aesthetically sound (no extraneous elements)?
- Does the logo reproduce well in small sizes and on screen?
- Does the logo lend itself to motion? Is it animated for motion?
- Does the logo hold up on its own around other logos?
- Do you have logo files with and without the tagline?
- Do you have partners' logos? Are they used consistently?
- Do you have logos in color, black and white, print, and web formats?
- Are the logos organized in a centralized location that can be accessed by staff?
- Who has access to the logos?
- Do you have a brand manual specifying logo usage guidelines?
- Is your logo legally protected?

### D. Brand Awareness & Perceptions

- Does everyone in the organization know the mission?
- Does everyone in the organization know the tagline?
- Are the organization's values clearly articulated?
- Is the organization's philosophy, approach or perspectives on issues clearly articulated and understood by staff and board?
- Do potential donors have correct perceptions of the organization?

## 3. Website

### A. Overview

- Is your mission clear on your website?
- Does the site help your organization to accomplish your mission?
- Do you regularly compare your website your competitors' sites?
- Do update your website at least monthly?
- What are your audiences' needs?
- Does the site fulfill those needs?
- Is it easy for users to find the information they are looking for?
- Does the site offer multiple points of engagement for the user?
- Does the site represent your brand well?
- Does your website have a Content Management System (CMS) that allows you to update content? Which system?
- Do you want to keep your CMS?
- What is the process for updating the site?
- Is the site easy to update?
- How often is it updated?
- Which sections are updated?
- Who is responsible for maintaining your site?
- What do you like about your website?
- What would you like to change about your website?

### B. Navigation

- Is the navigation clear and easy to use?
- Can site visitors find what they need?
- Can visitors understand where they are in the site at all times?
- Do all functions work the way they should?
- Is it easy to make an online donation / other type of purchase or transaction?  
How many steps are required? What are the potential hurdles or drop off points?

### C. Design

- Is the site design professional and does it represent your organization in the best light?
- Is the design engaging to your audience?
- Does the design of your site convey your organization's personality?
- Does the layout have a central focus and use space appropriately?
- Does the site have consistent layout and elements to acclimate the user?
- Are colors used consistently to convey your brand, aid in navigation and create emotional impact?
- Are photos and graphics used to tell a story and elicit an emotional response?

- Is type used in a consistent manner on the site?
- Does the site work well on mobile devices?

#### D. Content

- Does the site have all the necessary sections and content?
- Is the site structure sensible to a user?
- Does the content appeal to the needs of the audience?
- Does the copy convey your brand personality and tone?
- Does the copy avoid sector-specific jargon or assumptions about the audience?
- Are your annual report and audited financial statements available on your website?

#### E. Features

- Do you have Google Analytics or another system of tracking site traffic? Who checks it? How often? Do you need help updating the reports?
- Does the site have the needed features? Do all features work the way you want them to? Use the checklist below:

- |   |  |
|---|--|
| <input type="checkbox"/> Advocacy Tools (Petitions and/or Letter Writing) | <input type="checkbox"/> Online Auction System   |
| <input type="checkbox"/> Blog (Moderated?)                                | <input type="checkbox"/> Online Donations        |
| <input type="checkbox"/> E-commerce / Product Sales                       | <input type="checkbox"/> Photo Galleries         |
| <input type="checkbox"/> Event Calendar                                   | <input type="checkbox"/> Polling / Surveys       |
| <input type="checkbox"/> Event Registration                               | <input type="checkbox"/> Publications Archive    |
| <input type="checkbox"/> Forum or Message Boards                          | <input type="checkbox"/> RSS Feed                |
| <input type="checkbox"/> Interactive Maps                                 | <input type="checkbox"/> Social Media Links      |
| <input type="checkbox"/> Job Postings                                     | <input type="checkbox"/> Specific Landing Pages  |
| <input type="checkbox"/> Member Log In                                    | <input type="checkbox"/> System                  |
| <input type="checkbox"/> Membership Renewal                               | <input type="checkbox"/> Volunteer Opportunities |
| <input type="checkbox"/> News Section                                     | <input type="checkbox"/> Videos                  |
| <input type="checkbox"/> Newsletter Sign-up                               | <input type="checkbox"/> Other                   |

#### F. SEO (Search Engine Optimization)

- Do you have an SEO (Search Engine Optimization) strategy?
- Do pages have page titles and SEO descriptions?
- Does that site have a consistent page naming strategy (URLs)?
- Is the description that comes up in search engines a good overview of the organization, the site and its purpose?
- Have you identified keywords in your site?
- Have you used keywords effectively in your site?
- What search engine results do you achieve?

## 3. Events

- Do you have fundraising events? What type? How many? When are they? Who do they attract?
- How do you handle event registration? Do you have online event registration?
- What system do you use?
- Does this system meet your needs? Why or why not?
- Is your event registration system linked to your donor database?
- Do you have any marketing materials to help event participants (i.e. walkathon participants) raise money?

## 5. Social Media

- Do you have a social media strategy?
- What are your goals for using social media?
- Do you use social media platforms like Facebook, LinkedIn, Twitter, Tumblr, and Flickr?
- List the URLs for your social media platforms.
- Do your social media platforms and blogs get updated regularly?
- Who is responsible for managing your organization's social media presence?
- What is your greatest challenge in managing your social media?

## 6. Email Marketing

- Do you currently send out emails?
- To which audiences do you send out emails?
- What type (newsletters, e-blasts, event notifications etc.)?
- Approximately how many per year?
- Do you have a template that allows you to customize emails?
- What are your goals for your email marketing campaign?
- Who is your target audience for your emails?
- How many email addresses do you have in your system?
- How many physical addresses do you have in your system?
- Are you happy with that? Is your list growing or shrinking?
- What system do you use?
- Does this system meet your needs? Why or why not?
- Are your lists segmented? If so, how are they segmented?
- Does the system track open rates and click through rates?
- Do you check those reports? How often?
- What are you looking to achieve with your email marketing system? Do you have other requirements, such as polling or surveys?
- What are the overall results of your email marketing campaign?

## 7. Donor Management

### A. Donor List

- Do you maintain a donor database?
- How many donors do you have (at different giving levels)?
- Are they segmented? How?
- What are the demographics of your donors?
- Do you run reports to track the growth rates of your donor database?
- How often? Who does that?
- What is your donor retention rate?

### B. Donor Management System

- Who maintains your donor records?
- How are they maintained?
- Do you have a Donor Management System? Which one?
- Is it integrated with your website or any other system?
- Does the system suit your needs? Why or why not?
- Does it give you the information you need?
- What reports do you run? How often?

## 8. Fundraising

- What are your fundraising goals?
- What type of fundraising do you do?
  - Capital Campaign
  - Cause Marketing
  - Community Service Projects for Youth
  - Directed Giving
  - Endowment Campaign
  - Events
  - General
  - In Kind Contributions
  - Planned Giving
  - Retail Fundraising
  - Scholarship
  - Sponsorship
  - Young Professionals
  - Other
- What type of fundraising materials do you have (brochures, solicitation letters, event marketing, development packages, and email marketing)?
- How do you monitor your fundraising results?

## 9. Membership

- Does your organization have members?
- How many members do you have (percent of entire market)?
- What is the composition or demographic of your members?
- What is your annual membership growth rate?
- What is the renewal rate of current members? Can members join and renew online?
- Do you have any membership issues?
- When was the last time a membership survey was conducted?
- Who is responsible for membership?
- What membership marketing materials do you have (brochure, application, membership card, welcome kit, etc.)?
- What types of membership marketing strategies do you employ?
- What are the results of these marketing efforts?

## 10. Technology

- Who is your website Hosting Company?
- What is your website Content Management System?
- Who is your Email Provider?
- What is your Online Donation System?
- What is your Payment Gateway?
- What is your Donor Management System?
- What is your Event Registration System?
- What is your Email Newsletter System?
- What is your Online Auction System?
- What is your Social Media Management System?
- What is your Social Media Monitoring System?
- What is your Web Traffic Monitoring System?
- Are there any other systems or technology that your organization uses?
- How are all of these systems integrated?
- Do the appropriate people know how to use these systems?
- Do you have user guides for these systems?
- Who manages your technology? Who has the passwords and access information?
- Does more than one person have this access information?
- Is there a contingency plan for an emergency?
- Do you have service agreements for these systems?
- What applications do you use to design your brochures and marketing materials? PC or Mac?

Use the chart on the following page to record your information in one place. Make a copy and store it in a safe place in case of an emergency.



## 11. Monitoring

Below are lists of metrics that can be useful as measurement tools, but you don't necessarily need to track everything. Select items from these lists to create a marketing metrics dashboard that works for your organization.

### A. Website Metrics

- Number of unique site visitors
- Source of traffic (which search engines, partners and affiliates) and traffic on specific landing pages to track marketing campaigns
- Website sources (which sites are sending traffic to your site)
- Number of page views
- Average time on site
- Bounce rates
- Number of people who signed up for your newsletter
- Amount raised through online donations
- Amount of fee revenue generated
- Amount of fundraising merchandise sold
- Number of comments or reviews on blog posts
- Number of signatures collected on a survey
- Number of volunteers recruited

### B. Email Marketing Metrics

- Number of emails sent out monthly
- Number of people on email list
- Number of new subscribers
- Open rate
- Click-through rate
- What links are clicked on (including headlines, text and images)
- Number of "forward to a friend"
- Number of opt-outs

### C. Social Media Metrics

- Amount of money raised through your social media sites
- Number of Friends, Followers, etc.
- Frequency of your updates
- Frequency and quality of comments and subscribers on your blog
- Number of Tweets/Retweets
- Number of YouTube subscribers
- Activity levels on your social media sites
- Overall quality of your conversations

#### **D. Public Relations Coverage Metrics**

- Amount and type of coverage in different media (broadcast, newspapers, special interest publications, websites, blogs, etc.)
- Number of editors on your media list
- Press Release Syndications
- Number of bloggers you engage with regularly

#### **E. Events Metrics**

- Number of attendees
- Number of new attendees
- Amount of donations at different giving levels
- Sponsorship activity
- Media coverage
- General buzz (what people are saying)
- Auction activity

#### **F. Search Engine Marketing Metrics**

- Keyword search result ranking for different keywords
- Adword rankings
- Adword click-through rate