

Nonprofit Communications

Managing the Message
in a 21st Century Environment

*13 experts discuss
the theory & practice
of modern nonprofit
communications*

The Nonprofit Quarterly is published by Nonprofit Information Networking Association
112 Water Street, Suite 400, Boston, MA 02109; 617-227-4624

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1 What's Changed (or Should Have Changed) about Nonprofit Communications Practices?

Twenty-First-Century Communications versus The Illusion of Control: An Epic Battle

by Ruth McCambridge

SINCE EARLY AUGUST, A REMARKABLE SCENE HAS BEEN PLAYING out in Boston. The CEO of the local grocery chain Market Basket was ousted in late June 2014, the result of a family feud. It could have ended there, but apparently this CEO had treated his workers fairly, providing good salaries and benefits (resulting in some long-term, dedicated employees), and his customers fairly, providing good products at low prices. And it seems these stakeholders have a sense of a shared future together, because after Arthur T. Demoulas was fired from the helm, protestors took to the streets, with work stoppages, boycotts, and press events seeming to emerge out of nowhere. Workers don't show up, warehouses have become clogged with undelivered products, past customers are taping receipts from competing markets onto the store windows, and shelves are bare of perishables. At the time of this writing, the company is losing millions of dollars daily. While the board says there are multiple suitors for the company, it may well be that the defining bid goes to Arthur T. Demoulas—because the community wants him.

This kind of support would make most nonprofits proud beyond measure. I am reminded of articles we have published by Buzz Schmidt, who asserts that “all enterprise is

social”—that, in its entirety, it has impacts, both positive and negative.¹ It takes from community, on balance, or contributes to it.

The story of Market Basket helps us to understand the multiple ways in which every enterprise has an impact on its community. Many thousands of people feel that they have partial ownership of Market Basket's fate, and that level of involvement can be an organization's biggest asset or worst nightmare, depending on how one honors it. We have seen this kind of engagement emerge in the nonprofit sector, such as when stakeholders voted with their feet, wallets, and energy during the Susan G. Komen for the Cure debacle. And, it may be that the changes in governance we have all been sensing will continue to cut across sectors as people begin to understand and use their collective power in guiding institutions that they care about. But if we don't know what our stakeholders are thinking and experiencing, we will be at some risk.

Segregating Communication Is So Five Minutes Ago

The degree to which nonprofits neglect or marginalize their communication functions seems, if you believe in the notions of public benefit and the common good, both wasteful and immoral: communication is, after all, core to the associational and democratic purposes of the nonprofit

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sector. Communication helps build the intelligence of whatever enterprise one is engaged in. It creates energy and interest in that enterprise; builds an understanding of issues and of ways to take people-supported action on those issues (reframing when the public impression of the issue is off-kilter); and, of course, helps advertise the enterprise to those who might support it. Communication also serves to provide those who are meant to benefit with a way to help guide the enterprise.

These seem like functions that are too multiple and important to be marginalized. Yet even when a nonprofit has a paid, professional communications staff, both the organization and the staff often misunderstand their role as one of advertising—convincing and informing rather than engaging. By engaging, I mean involving stakeholders as part of the intelligence and energy of the enterprise in a way that respects them, integrates their thoughts and ideas, responds to them, and encourages them to respond to one another while advancing cause and knowledge.

Get with the Program

Over the past half decade, we have seen a virtual explosion of journalism sites in our sector. They run the gamut from investigative strongholds like ProPublica—and state and local sites focused on policy issues and local issues, respectively—to sites that provide venues for lay journalists to contribute to the public intelligence. Some of this latter category involves journalism under the extreme conditions of a suppressed free press (in an international context), and it provides information in a different form that is even more iterative than journalism has been in the past. Thus, the truth is pieced together for people to act upon.

In pioneering organizations like Wikipedia, MoveOn.org, and Change.org, people act and create together on a shared platform, and the results have changed the face of interactions between people and information and institutions. This and other factors invite us to rethink the role and style of communications in our work.

Communicate *at or with?* Reciprocity

Communication, as we are looking at it here, requires reciprocity. This reciprocity extends beyond the message sent and received fairly accurately to a deeper and longer negotiation of sorts: a searching out of common interests, topic, and form that ends in a sharing of intelligence toward a common end and the common good. This is, at its essence, a different practice from telling people something they ought to know or do. It is different even from devising focus groups to figure out how to tell someone something that will resonate. Instead,

it is at its best an invitation to engage with a community of interest—and through that engagement, a powerful social contract of sorts can be built to advance a cause.

Of course, we all have a contextual way of hearing and knowing that emerges from our own experience of things. A “community’s” understanding of issues is therefore both local and diverse; still, there are some common archetypal stories that speak to large portions of the population in very much the same way.

Our pluralistic democracy is, then, a garden of voices, identities, and points of view, and of ways in which people can be called to action when an important aspect of their identity is addressed in a respectful manner and given play to express itself with others. This is what the soul of communications can and should be in the nonprofit sector.

This playing with ideas in a common space is, of course, aided by technology, which calls on us to act differently in that space and bring a practice ethic to it that strives not for low common denominators but rather the highest of aspirations, even seven generations out.

Pacing

In an interview *NPQ* conducted with Mark Jurkowitz in 2009, Jurkowitz pointed out that there is no longer a news cycle and that instead there is a 24-hour, 365-day-a-year, never-ending potential to break news—and this can potentially be done virtually free of an institutional intermediary. It’s a new communications world with different pacing.²

Keenan Wellar, author of “Social Change and a Welcoming Environment for Youth in the Nonprofit Community,” notes that today’s communications require what he calls “transparent pacing.” He writes,

Our volunteer coordinator receives frequent feedback from volunteers who were excited to contribute time and ideas to a particular cause but who come away feeling rejected—even in cases where they were responding to an agency calling out for volunteers. Volunteers report feeling as if they were distracting staff from other work or, in some cases, they never heard back at all. Other complaints include training and orientation that is offered infrequently, and/or once training is completed, limited opportunities and no room for creativity.

At LiveWorkPlay a volunteer inquiry typically receives a same-day response, and rarely will more than 48 hours pass. After a telephone or email exchange, moving to the next step of a face-to-face meeting with our coordinator is usually a matter of days, and the first opportunity for a formal orientation and training takes no longer than a month. While these necessary

processes are underway, our coordinator is already working with the candidate to come up with a plan, and collaborating with other staff and volunteers about the possibilities. This may all seem very obvious, but we have amassed substantial feedback that indicates it is far from common practice.

When the process works well, it's no surprise that the digital generation appreciates this type of transparent pacing, and that they share their positive experiences with others.³

Weller writes that this responsiveness pays off in many ways because, "The best form of volunteer recruitment is also the oldest: person-to-person recommendations. Today's networked youth have the ability to amplify their recommendations to friends, family, and coworkers in a matter of minutes."⁴

Integrity and Trust

To be in a communications space that is reciprocal over the long term requires that your nonprofit be trusted to manage, and even be in, that space responsibly. There are some characteristics that you may want to look to in self-examination:

- *Stance.* Do we have a clearly understood "identity," with a point of view that can act as the foundation for discussion? In "Mechanisms for Stakeholder Integration: Bringing Virtual Stakeholder Dialogue into Organizations," Paul Driessen, Robert Kok, and Bas Hillebrand describe this characteristic as follows:⁵

Organizational identification refers to the degree to which internal and external stakeholders share beliefs about the central and enduring characteristics of the organization and reflects a bond between the stakeholders and the organization (Bhattacharya & Elsbach, 2002; Maignan & Ferrell, 2004).⁶ . . . In a virtual context, organizational identification is a particularly important organizational outcome, as organizational identification represents the "critical glue" that links stakeholders to organizations in the absence of physical meetings (Wiesenfeld, Raghuram, & Garud, 1999).⁷

- *Platform for inclusion.* Again, the authors are clear on the importance of ensuring that the capacity is present to manage conversations:⁸

Organizations should match their coordination mechanisms to the high intensity and richness of virtual stakeholder dialogues. Organizations without proper internal coordination are prone to act incoherently on the issues raised by its stakeholders and likely to face poor organizational

identification among its stakeholders. These organizations may not live up to the expectations raised during the dialogue. . . . Without suitable coordination mechanisms, engaging in virtual stakeholder dialogue is a superficial attempt to present a favorable appearance. Managerial practices that are only adopted for ceremonial reasons have low effectiveness (Kostova & Roth, 2002).⁹ Adopting virtual stakeholder dialogue without suitable coordination mechanisms has detrimental performance consequences.

- *Openness to suggestion and dialogue.* The authors call this "bandwidth," and write:¹⁰

Higher bandwidth structures provide more capacity to accurately exchange information, making responses to stakeholder issues more effective (Van de Ven, et al., 1976).¹¹ With virtual environments moving the locus of activity more towards the periphery of the firm, structures where the coordinator is located far from the issues at hand (low bandwidth) are not likely to be effective for coordinating all issues (Eisenhardt & Brown, 1998; Nambisan, 2002).¹²

The key to greater bandwidth is a plan to get you there. While not rocket science, it does take design and a commitment to a less centralized leadership environment.

Curation

A concept called *curation* is central to all of this. By curation we mean the organization of information, thoughts, and ideas. The challenges to the curation of this space between organizations and constituents parallel the challenges of a learning organization (or any kind of community of practice) in that beyond the discussion, people need other kinds of information—such as research and other points of view—that feed their knowledge and opinion.

Frames, Communicating with the Press, and Repetition

If you believed that key press contacts were likely to be important to you, you would probably try to form some kind of relationship with them. And, because they must communicate with the larger public, and may be seen as being more objective than you about your work, you would likely want them to understand the frame through which you view the work that you do. Why? Because the media still, at least in part, set or reinforce the frames through which the public views an issue. But many reporters are besieged by self-serving press releases that signify nothing. Organizational profiles, then, told from

an organizational, exceptionalist perspective, might be less interesting to the media than, say, a story that notes a trend or important piece of national research, and then makes a local connection that is not simply a way to self-appreciate—for instance, a recent piece of research on nursing homes that suggests nonprofits are generally rated more favorably than for-profit facilities.

If you had a relationship with a local reporter, you could pass that information along—perhaps with a suggestion that local residents may be interested in the ways in which nonprofits differ, as far as nursing homes are concerned. And then you might suggest that there are, indeed, some fields in which nonprofits undeniably perform better. These kinds of efforts can be far more effective than self-aggrandizing press releases, which accrue to your credibility usually not at all. But such efforts, of course, require that you pay attention to your field.

They also require that you understand how commonly assumed frames of reference may not be serving your cause, and then you must embark on a campaign to reframe an issue—a profound act of systems-changing guerrilla warfare: by seizing the frame of reference, you take control of the field.

In Donella Meadows' classic article, "Leverage Points: Places to Intervene in a System," she describes a frame, or paradigm, as follows:

The shared idea in the minds of society, the great big unstated assumptions—unstated because unnecessary to state; everyone already knows them—constitute that society's paradigm, or deepest set of beliefs about how the world works.

There is a difference between nouns and verbs. Money measures something real and has real meaning (therefore people who are paid less are literally worth less). Growth is good. Nature is a stock of resources to be converted to human purposes. Evolution stopped with the emergence of Homo sapiens. One can "own" land. Those are just a few of the paradigmatic assumptions of our current culture, all of which have utterly dumfounded other cultures, who thought them not the least bit obvious.

Paradigms are the sources of systems. From them, from shared social agreements about the nature of reality, come system goals and information flows, feedbacks, stocks, flows and everything else about systems.¹³

But an issue cannot be reframed just one time and that should do it. Reframing takes repetition from many points in a system, stories, and research that reinforce the issue's validity. Framing is a powerful act, and repetition drives it

deep into our psyches, where our ideas reflect back upon the new surface for reconsideration.

Making Sure You Are on the Same Page— The Definition of Terms

The extent to which we agree to misunderstand one another can be staggering. In a Discover card commercial, a guy calls the credit card company to say he has heard that it provides frog protection. He is holding a plump frog that, clearly, he deeply cares for. The guy on the other end of the call says, "Oh yeah, fraud protection? You bet!"—and even when they check back with one another about being on the same page, apparently they are just willing to agree to let stand whatever misunderstanding exists.

This, I believe, happens all the time, and it dumps a load of disappointment in the middle of a relationship.

A Governance Surprise

More and more often, we see examples of boards of corporations that have not come to terms with the reality that their power is increasingly enjoyed only at the pleasure of their stakeholders, who have opinions. The ease with which one group of stakeholders can communicate their case to another group is mind-boggling. This communication makes it harder to hide things internally and easier to organize externally for institutional change. What does communication have to do with this? The lack of communication can cause serious errors in judgment regarding actions that the board thinks it can take without serious blowback.

• • •

Communication is a function that cannot be segregated, and its deployment should be strategic: How broad a bandwidth do you want? What are you promising in terms of responsiveness, and toward what end? Who is involved? The answer to that last question is, I suspect, "everybody." In the same way that many advocate for a "culture of philanthropy," where everyone attends to funding, we may need to promote cultures of communication, community learning, and action. After all, isn't that what we are here to do?

NOTES

1. See, for example, Buzz Schmidt, "All Enterprise Is Social: Measuring the Impact of Endeavors across the Profit Boundary," the *Nonprofit Quarterly* 21, no. 1 (Spring 2014): 18–23, <https://nonprofitquarterly.org/management/24167-all-enterprise-is-social-measuring-the-impact-of-endeavors-across-the-profit-boundary.html>.
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Two Eras of Civic Information and the Evolving Relationship between Civil Society Organizations and Young Citizens

by Chris Wells

Editors' note: *The following was adapted from a study published by New Media & Society, SAGE Publications, in June 2014 (vol. 16, no. 4). We thank NMS, SAGE, and the author for their kind permission. The author wishes to thank Tim Carlson, Cory Eng, Lily Ly, and Kiyomi Higutchi for assistance in coding, and W. Lance Bennett, Deen Freelon, Lew Friedland, and anonymous reviewers for their helpful suggestions on the manuscript. Research for the study was supported by a University of Washington Department of Communication Graduate Student Research Grant.*

SINCE THE MID-NINETEENTH CENTURY, PARTICULARLY IN THE United States, civic institutions such as political parties, interest groups, government watchdogs, and community associations have provided essential connections between individual citizens and political processes. They have coordinated collective efforts, developed political resources, and offered strategic expertise in navigating complex political waters. They have also been conduits of civic information, producing newsletters and pamphlets describing issues and positions, hosting interpersonal meetings, and providing interpretation of information from journalists and other sources. Given these essential roles, it is

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Questions that will be answered

- What does style of communication have to do with the civic engagement of young people?
- What does your communications culture signal to young people? Are you aligned with their communications preferences?
- What are the various communication styles of organizations in the digital age, and what effect do those styles have?
- How can you track, understand, and make good use of substantive online participation?

How you might want to make use of this article

- If your organization is concerned about engaging young people in its work and in civil society, this article can provide a great base for discussion of possible changes your organization can make. Use it to spark discussion at a retreat, a board meeting, or among staff.

hard to imagine the future of public engagement without such institutions. Over the course of the second half of the twentieth century, however, these institutions declined and their work changed.

A Paradigm Shift

A number of explanations have been offered for the decline,¹ and while not contradicting any of these, the framework of civic information styles that this paper advances adds a new perspective.

We argue that a paradigm shift in the logic and structure of the information system is underway, which may entail a period of disjuncture as institutions of democratic society lag behind (especially younger) individuals' preferences and habits with respect to how they interact with civic information. The framework's communication-centered view suggests that part of the disjuncture may be attributable to civic organizations' adaptation to the "media politics" of the late twentieth century, in which their communications became driven by the need to compete in a highly competitive, mass-mediated political communication environment.² Organizations' needs for active member input were lowered, as they relied increasingly on experts to frame both policy and their public face, and the costs of member input were raised, as the risk of members' actions or communications disrupting the carefully honed message of the communication officials increased.

This falls in line with Theda Skocpol's analysis of participation in civic organizations, in which she notes a shift in organizations' structures from "membership" organizations rooted in small, personal gatherings to "management" conglomerates aggregating the resources—often simply financial—of disparate individuals into a strategically directed political force.³ These management organizations offer a citizen-communication relationship increasingly in conflict with the participatory preferences that have been developing over the past several decades, and the rapid dispersion of digital communication technologies in the last decade, in particular, has spurred scholarly interest in how changes in communication technology might be reshaping—and possibly reinvigorating—citizens' opportunities and inclinations for engagement. In addition, research has especially focused on the engagement of young citizens, a population historically underengaged and among the most active users of digital media.⁴

This paper, too, concentrates on young people and engagement; however, unlike much recent work on digital media and civic engagement, it does not cover the myriad ways in which digital media enable novel forms of decentralized

and personalized social movements or activities. As exciting as these new forms of political communication are, this study makes the case that it would be a mistake to neglect how digital media are transforming the relationship between citizens and the major civic organizations that have guided American civic life for the past 150 years.⁵ Our aim, therefore, is to reconsider the faltering civic engagement record of young people through the lens of the communication relationship between citizens and civic organizations, and to consider how that relationship is changing—and has the potential to change—with the introduction of interactive digital media.

We proceed in two steps. First, building on earlier work on changing civic identities,⁶ we develop a framework of two civic information styles at play in contemporary Western societies. We then apply that civic information framework to reconsider the relationship between major organizations of civil society and young citizens.

Two Styles of Civic Information

Two bodies of thought inform our framework of civic information styles. The first is research on the shifts and challenges affecting youth civic engagement wrought by social changes of the last half century. The second considers the norms and practices of "digital culture."⁷

The notion of civic information that we employ here is a broader and more inclusive term than "news." It views the news as a particular form of citizen-information relationship based in the modern society of the mid-twentieth century—one that privileged rationality, division of labor, and a relatively clean separation between the public and private spheres of life. For citizens of the "high-modern" era of journalism, keeping abreast of the public and political world meant getting the news via professional reporters and newscasters. For many citizens, this is no longer their civic information experience; they now receive news about any topic from a variety of sources that include credentialed journalists but also bloggers, friends, and a host of others—and at any time of day.

Social Change and Civic Identity

Scholars emphasize that whether and how young people become engaged must be considered in light of the sociopolitical context in which their civic identities develop.⁸ The last half century has been a period of profound change in those contexts. The rise of the "network society"⁹ has been characterized by specialization and globalization of the industrialized economies and other processes that decrease opportunities for forging strong interest-based social organization on a traditional, local level.¹⁰

This change is a marked departure from the “modern” social order that mid-twentieth-century citizens experienced, in which economic, social, and political well-being was organized through formal social groups. W. Lance Bennett offers a two-part typology of civic styles to describe the citizenship emerging under the new conditions. In his reading, young people’s citizenship is increasingly characterized by personally resonant forms of action organized through personalized networks—leading to activities such as political consumerism, “lifestyle” or “post-materialist” politics, and nonpolitical but civic activities such as volunteering. Bennett terms this emergent civic orientation “self-Actualizing,” and contrasts it with the “Dutiful” orientation of older citizens.¹¹ The dutiful–actualizing framework of civic styles is the starting point for the civic information–style framework we develop here (see table 1, below). However, that civic identity is an insufficient conceptualization of how younger citizens’ information styles diverge from those of the previous information era. To complete the picture, it is necessary to examine the norms of digital culture, in which the trends of civic identity find expression and reinforcement.

Table 1. Two paradigms of civic information, contrasting the preferred mode of interaction and bases for interpreting and assessing information by the dutiful and actualizing civic information styles

	Older/dutiful	Younger/actualizing
Mode of interaction with information	Centered on reception of information from news and key civic leaders	Expectation of participation in production and sharing of information
Interpretation and assessment of information	Guided by membership/identification with social groups, parties; authoritative sources key to credibility	Driven by individual interests and trusted networks; credibility based on relevance and reliability

Technological Change

As has been widely observed, many younger citizens have an affinity for communicating via digital media.¹² Mark Deuze examines the “set of values, norms, practices, and expectations shared by [. . .] those inhabitants of modern societies most directly affected by computerization.” One characteristic he noted was participation: the notion that across many domains of life, from television to gaming to politics, people were “increasingly claiming the right to be heard rather than be spoken to.”¹³ That is, there has been an emerging expectation that communication will come with participatory

opportunities—opportunities to contribute one’s own ideas and meanings to the texts circulating through society.¹⁴

A second characteristic of digital culture—bricolage—describes the process of assembling a perception of reality from a variety of sources.¹⁵ Bricolage is the information-gathering norm of a network logic—the equivalent of rigorously following an authoritative newspaper or credible opinion leader in the group-based society. This process occurs at the level of the individual, who designs a communication environment using tools such as Really Simple Syndication (RSS) feeds and social media, and at the level of a media or civic organization, which collects content to share with readers. In this way, civic organizations become information nodes, connecting users to sources in a wide network rather than within a single institution.

Two Eras of Civic Information

We have argued that a shift in civic information style is deeply rooted in social changes, and that those changes both informed the development of and are expressed through the norms of information exchange becoming known as digital culture. These changes point the way toward a framework of civic information styles that contrasts the emerging information style with the one that preceded it. Table 1 summarizes the contrast between these information styles in terms of two key elements of civic information use: the user’s mode of interaction with information, and the bases for interpreting and evaluating that information.

First, in the dutiful era, the good citizen interacted with civic information—preferably from certified journalists and authoritative civic leaders—by consuming it. In contrast, the actualizing citizen rejects a purely consumerist orientation toward information: this citizen has grown up in an era in which political events are not limited to any formal time; rather, the development and competition of opinion is relentless, and communication acts themselves represent a continually available avenue for participating in that activity.¹⁶

Second, we noted within the actualizing information style a preference for networked information seeking, or bricolage. For younger citizens who embrace this model of information, the declining credibility of news organizations and other sources of civic information is giving way to new patterns of information interpretation and assessment based on reliability rather than authoritativeness.

Reinterpreting the Decline of Organized Civic Association

The civic information–style framework just described gives us a fresh opportunity to understand the gap between younger citizens and politics.¹⁷

The Possibilities of Organizational Communication Online

The digital revolution stands out starkly against the backdrop of late-twentieth-century management politics, because a communications technology that some see as reversing this dynamic is now standing alongside a civic order of highly professionalized communications and a dispirited citizenry, and organizations old and new are experimenting with novel ways of engaging citizens.¹⁸ Bruce Bimber uses the notion of “post-bureaucratic political organization” to describe the weakened need for highly structured organizations to facilitate collective political action and, in their place, the rise of more flexibly organized opportunities for collective action.¹⁹

Building on this idea, in “Modeling the Structure of Collective Action” Andrew Flanagin et al. offer a conceptualization of organizations’ approaches to engagement and communication with links to the styles of citizen information preference developed above. They describe two modes by which organizations attempt to engage their supporters: one “institutional,” in which organizations structure and prescribe the nature of supporters’ engagement with the group; and one “entrepreneurial,” in which participants have a high degree of autonomy and may design collective action in ways that are not sanctioned or controlled by a central authority.²⁰

These two forms of organization–supporter relationship describe the same tension between autonomous information sharing and dutiful consumption that the civic information framework captures at the individual level. Both posit a shift toward a citizen or supporter role that involves substantially more participatory—or entrepreneurial—opportunities for citizens and requires more flexibility and accommodation on the part of organizations. Part of the recent attractiveness and success of the entrepreneurial action forms described by Flanagin et al. is surely their openness to active participation and expression that resonate with the actualizing style of civic information. Indeed, evidence from studies of young people in the context of school-based civic learning demonstrates a notable preference for active decision making and self-expression over conventional, rote civics curricula.²¹

Communication Styles of Organizations

These observations raise the core questions of this study: To what extent are major civic organizations willing and able to adapt to a communicative relationship with young people that suits their information preferences? And which are most and least likely to do so? Recent work on the evolution of organizations and digital media offers some guidance on these questions.

David Karpf argues that a new class of organizations is emergent, largely responding to the new opportunities afforded by digital communication. Viewing MoveOn as an archetypal member of this class, he illustrates the new model of organizational membership and communication on offer: citizens’ participation in groups is defined less through dues payments and clear boundaries between members and nonmembers and more through flows of communication and networked actions enabled, for example, by a MoveOn e-mail action alert. Further, he anticipates a shift in the ecology of interest groups, as traditional brick-and-mortar organizations struggle to contend with the opportunities for fundraising and rapid, dispersed mobilization pioneered by MoveOn and its ilk.²²

Connecting these organizations’ patterns to the collective action theory developed by Flanagin et al., Bimber et al. show that MoveOn members have a more entrepreneurial experience within the organization than do members of the American Legion or Association of American Retired Persons (AARP).²³ This suggests that a certain class of organizations—operating only online, with limited investments in physical infrastructure, permanent staffs, and formal membership, and that are unlikely to have existed before the inception of the World Wide Web—may be likely to outperform others in offering communications attractive to citizens with actualizing preferences.

On the other side, organizations that did exist before the Internet, and that remain heavily invested in offline programs, are likely to be different. Older organizations are likely to experience organizational inertia—organizational patterns and memory of an era of media politics that make them protective of messages and resistant to sharing their message making with supporters. These organizations may find it challenging to embrace a communication relationship rooted in the norms of digital culture.

This distinction, between organizations with roots in the offline world and those that have been created to take advantage of the unique norms and opportunities of digital culture, formed a hypothesis for testing: that a greater portion of the status updates of online-only organizations—those without substantial ties to the offline world—would include actualizing communication characteristics than would the updates of organizations based offline.

Other Considerations

Leaving aside online-only organizations, several other factors may affect an organization’s adaptation to new information norms. In particular, organizations in different positions within the community and with different orientations to the

civic world may experience distinct configurations of incentives for experimenting with innovation, risks of failure, and constraints based on members' expectations.

One dynamic worth investigating is how an organization's role in formal politics affects its willingness to engage in actualizing communications. There are several reasons to suspect that this may be inhibiting: an organization engaged in political contention has a great deal to lose from being associated with content offensive to a key constituency or otherwise failing to control the narrative of the campaign. Stromer-Galley identified the reticence to enable website interactivity as early as the 1996 and 1998 U.S. elections;²⁴ and Karpf illustrates this liability with the example of MoveOn's unfortunate experience with crowd-sourcing TV advertisements in 2004.²⁵ Bimber similarly predicts that parties and governments should be less adaptable to new communication styles than other types of organizations, because they have many more institutional barriers (and risks) to significantly modifying their style.²⁶

A study of civic learning websites in the United Kingdom documented such a pattern in that context. Stephen Coleman's U.K.-based study depicted a stark divide between websites offering formal civic experiences but highly "managed" interaction styles and those featuring "autonomous" communication environments but little by way of formal political content.²⁷ Wells showed a similar pattern in the U.S. context.²⁸

An organization's style of membership surely also plays a role in how it chooses to address supporters through social media. Organizations with memberships accustomed to consultation and participation in decision making may be more likely to adopt interactive communications in social media, whereas groups that have most fully internalized the management style may not feel they need to greatly involve supporters. The key question we explore at this juncture is,

How will various kinds of offline organizations differ in their willingness to offer features of actualizing communication?

Organizations and Social Media: Facebook

We tested this question in the context of Facebook.²⁹ Facebook's rapid growth and features tailored to politicians, nonprofit organizations, and corporations have made it an attractive communications platform for those hoping to reach and develop communications relationships with people online.³⁰ More pertinent for our purposes, Facebook represents a test of how civic organizations will adapt to a communications platform where participation and networked information sharing are strongly established. While no longer a youth-dominated platform, over 50 percent of Facebook's users are still under thirty, and Facebook's history as a youth-driven site suggests that it embodies many of the digital culture norms. It also continues to be a nearly ubiquitous presence in young people's lives.³¹

To begin, we constructed a sample of active websites, assessed and selected for having a focus on youth and enhancing civic engagement,³² from organizations noted in previous research,³³ lists of the largest nonprofit organizations in the United States,³⁴ searches for websites focused on connecting youth to civic engagement, and traffic counts derived from compete.com. We made sure to include in particular recently created organizations that exist exclusively online (these we termed "online only"), and offline organizations that varied in their goals of engaging youth. We settled on three categories of offline organizations: those closest to the locus of formal politics (parties, candidates, and government sites, which we termed "government"); those outside government but that aimed to engage youth in political activity (we termed these "interest groups"); and those without formal political goals but rather (broadly) civic goals (we termed these "community groups").

Table 2. Measures of dutiful and actualizing civic information styles as operationalized for analysis of Facebook status updates

	Dutiful	Actualizing
Status update text: organization- or fan-driven knowledge and action	<i>Nonparticipatory, organization-driven definition and examples</i> News about an issue, description of what organization is doing, or encouragement to take a particular action: "Check out the article about us published in the nytimes!"; "Tell your congressman you oppose whale hunting!"	<i>Participatory, fan-driven definition and examples</i> Appeals to fans to share information, opinions, or action ideas: "What have you heard about the latest IPCC report on climate change?"; "What is your local community doing to reduce its carbon footprint?"
Link destinations: either internal or external	<i>Authoritative, centralized information presentation</i> Links to content on the organization's own Facebook page or website	<i>Networked information sharing/bricolage</i> Links to content on the Facebook pages or websites of unaffiliated organizations

After a process of elimination based on Facebook pages that were not found, were defunct, or produced no status updates during our three-month sample period (February 1–April 30, 2010), we were left with fifty-eight Facebook pages. We gathered status updates from the three-month period from each organization’s page. (We selected the three-month period to offer a reasonable range of time during which each organization created posts.) In compliance with Facebook’s Statement of Rights and Responsibilities, we gathered the data manually; to make the data gathering and coding tasks manageable under this condition, only one-third of status updates from more prolific organizations (those posting fifteen or more times per month) were included. From organizations posting fewer than that, every status update was collected and analyzed. We corrected for the different rates of gathering in analyses.

To assess the degree to which each organization’s communications fell more in line with a dutiful or actualizing style of civic information, we applied two measures to each status update. The measures corresponded to the “participatory” and “networked information seeking” characteristics of emerging information preferences developed below.

In order to gauge the participatory inclinations of organizations’ communications, a first measure distinguishes what we termed “organization-driven” from “fan-driven” content. Organization-driven content occurs when an organization uses a status update to project information to supporters by stating facts or opinions, or actions supporters should take. This type of communication aligns with a dutiful civic information style, in which supporters consume information with clear signals from authorities. Fan-driven posts invite fans to contribute to the base of knowledge and opinion of the organization, and align with a more actualizing style. Following literature on civic education and socialization,³⁵ our study distinguished two forms of status update content: straight, informative messages, which we termed “knowledge”; and mobilizing messages calling fans to action, which we termed “action.” We thus assessed each status update for *organization-driven knowledge*, *organization-driven action*, *fan-driven knowledge*, and *fan-driven action*. Because status updates can contain multiple clauses and valences, any combination of these four content types could occur in a given status update.

A second measure gauged the organizations’ alignment with the networked information-seeking preferences of young supporters by evaluating the destination of each link provided with status updates. Links that directed inwardly to organizations’ own content, either within the Facebook page or on their website, were considered “internal,” and aligning with a more dutiful expectation of civic information style in which

organizations present themselves as silos of expert-curated information. Links that directed outwardly to content from another source, such as another civic organization or a news site, were considered “external,” and aligning with an actualizing information style in which the organization treated itself as one informational node among many. For young citizens constructing their own personally and socially curated information networks—by making connections to preferred individuals and sources of information—organizations acting in this mode can add value and thereby develop a new relationship with potential supporters.³⁶

We used both the content of status updates—either organization- or fan-driven—and the destination of links—either internal or external—in comparing the communication styles of online and offline organizations and of different kinds of offline organizations. In all, 1,844 status updates were collected across the organizations, for an average of just under 31 status updates per organization. Posting frequency ranged from two sites that posted only one status update each during the sample period to the Sierra Club, which posted 326 status updates, of which 109 were collected and analyzed. Organizations that posted more frequently were thus relatively more represented in the sample (correcting for this produces the same results). Organizations employed the full range of features available with status updates, including photos, videos, and links: 1,627 (88.2 percent) status updates contained at least one link. Status update text was typically short, well under the 420-character limit: the median update was only 137 characters long, although a few used the full allotted space.

Organization- and Fan-Driven Content

Four types of status updates offered by the four categories of sites were *Online Only*, *Government/Party*, *Interest*, and *Community*. Because organization-driven knowledge was so overwhelmingly common—occurring in all but twenty-two of all the status updates—its representation is the percentage of status updates that presented organization-driven knowledge and no other type of content. It became immediately clear that a strong majority of the status updates posted by organizations were simply conveying information—providing *organization-driven knowledge*; 63.8 percent of all status updates were of this type. The pattern is especially pronounced among government (75.2 percent) and interest organizations (68 percent), somewhat less so among online-only organizations (64 percent), and made up less than half of the posts of community organizations (44.1 percent). Examples of this type of message include a 4H message to click a link to read about a 4H robotics team at a competition; the American Civil Liberties Union (ACLU) promoting a Facebook post

about privacy and cell phones; and Barack Obama informing his supporters about his Wall Street reform plan.

The next most common communication type is the other form of organization-driven content: *organization-driven action*. This was an interesting finding, given the research showing the importance of action opportunities in engaging youth with online content.³⁷

The type of content of greatest interest to us was that indicating an actualizing communication style: *fan-driven knowledge and action*, in which organizations asked supporters to weigh in on a topic or suggest ideas for actions. Overall, these were uncommon: only 5.6 percent of all status updates contained fan-driven knowledge, and we identified fan-driven action in only twenty status updates—a mere 1.1 percent of the sample. However, the low occurrence of fan-driven knowledge disguises significant variation among organizations of different types. Recall that we anticipated that online-only organizations would offer more fan-driven knowledge than organizations of the other three (offline) categories. For two of those categories, this was the case: 6 percent of online-only organizations' updates contained fan-driven knowledge, whereas only 3.6 percent of government organizations' updates and only 3.1 percent of interest groups' updates did.

Running counter to our hypothesis, community organizations provided fan-driven knowledge most often, in a notable 11.8 percent of their status updates—significantly more often than each of the other site categories. Although contradicting our hypothesis, this finding lends some support to our premise that organizations without specific political agendas may be more adaptable to actualizing communication than those with agendas: community organizations offered more fan-driven knowledge than the overtly political government and interest organizations.³⁸ Examples of fan-driven knowledge include the community group Beta Club asking fans to report on their experience at their state convention; the Boy Scouts asking fans to nominate a “leader who inspires you” for an online award; and the website Tolerance.org asking fans whether they have noticed racism in their community.

Across the sample, internal links were the more common variety. Eighty-four percent of links were internal, with only 16 percent directing to content beyond the organization itself. This meant that most of the time, when an organization used a link, it directed to content about itself—a striking finding in the face of the strong norm of sharing in the Facebook context, and one that suggests a strong degree of networking narcissism. Our prediction in this context was that online-only organizations would be most comfortable linking to content beyond their immediate purview, and

online-only organizations' status updates were indeed most likely to include external links (19 percent did so). Interest and community organizations followed, with 14.7 percent and 13.5 percent, respectively. Government organizations were by far the least likely to offer external links (with only one status update in twenty doing so)—a notable finding given that government groups were most likely to add a link to a status update (only 4.7 percent had no link).

When we compared offline organizations, the results were not as simple as a political versus nonpolitical divide: community and interest organizations offered external links at comparable rates, each substantially higher than government organizations.

Conclusions

Young citizens' experiences comprise fewer formal civic group memberships than in the past, while digital communications have permeated all aspects of life. An important consequence is that the relationship between civic organizations and young citizens will increasingly be based on digitally mediated communication. We might be hopeful that the new era will invite a communication relationship more in line with the participatory preferences of the younger citizenry, in contradistinction to the “membership” era of late-twentieth-century media politics. We might also be skeptical that civic organizations will easily adapt their communications to the new context. We introduced the framework of two civic information styles to examine this question.

We found considerable support for our expectation that organizations based wholly online would offer a more actualizing communication experience than organizations with strong roots in the offline world: online-only groups offered more participatory opportunities than government or interest groups, and they were the most likely by a significant margin to post references to a diverse array of content types through their links. These findings support the notion that the communication dynamics of civic engagement are undergoing a transformation, and that newer organizations being created to take advantage of online possibilities are most reflective of a set of norms endemic there.³⁹ They generally fall in line with studies finding resistance to incorporating interactivity into political communications.⁴⁰ The caveat here is that one specific type of offline group, the community category, offered participatory invitations even more often than online-only groups.

Meanwhile, on our other measure of actualizing style, interest groups joined community ones as more likely to offer links to external content; government groups used links to point to their own content 95 percent of the time (online-only organizations, of course, linked externally more than all categories of

offline groups). Why did community organizations perform so strongly on the participatory invitations measure? And why did interest groups perform very poorly there, but more capably when it came to promoting external content?

We noted earlier that interest and government groups may be particularly attuned to risks inherent in inviting supporters' contributions to a public space;⁴¹ this appears to play a role in their low rates of participatory invitations. In contrast, something different is happening in community groups' Facebook use. While the present data limit our ability to specify what this is, future research might examine the role played by social media communications in the broader set of interactions between organizations and their supporters. The measures we used here were necessarily a subset of those exchanges and, as a result, are an incomplete picture of the activity networks—both online and off—in which organizations and their supporters are situated. One wonders whether community organizations have internal norms strongly oriented toward inviting member participation: this may thus be a natural pattern for page administrators to transfer to the Facebook context.

Ultimately, there may be different conceptualizations of the value of social media at work. In their survey of advocacy organizations, Jonathan Obar et al. report a variety of characteristics those organizations see as useful: these include reaching existing and new members and creating feedback loops.⁴² Our results imply that different kinds of groups may give very different priorities to these functions.

There may also be institutional legacies that have an impact on the styles of interaction that organizations seek to foster with supporters. In a recent analysis from a new institutionalist perspective, Esterling et al. examined the adoption of interactive features in the websites of newly elected U.S. congresspeople.⁴³ They found that the representatives do not appear bound to their immediate predecessors' choice of features, suggesting a degree of freedom from strict path dependence and an opportunity to take advantage of innovations. However, few did take full advantage of interactive innovations, and their sites tended to reflect the patterns extant in Congress, a phenomenon the authors call "distributional path dependence."⁴⁴ Future research should consider whether a similar phenomenon is taking place among the types of organizations examined here.

As for why interest organizations offered links to external content relatively often, a closer look at external links suggests that this may be a product of their location within the political sphere. When they offer external links, interest organizations direct their supporters to web locations on which they can learn about current events on issues of concern, see

what relevant institutional bodies are doing on the issues, and occasionally take action—for example, by leaving a post on a politician's web page or Facebook page.⁴⁵ Interest organizations' patterns of linking appear to be a function of the fact that their work takes place in a political environment in which different kinds of entities interact—government agencies, the press, other organizations—and in which they want to mobilize their supporters to engage with those entities. It is possible that because they are already at the center of much political decision making, parties and government agencies see less reason to connect their supporters to a wider web of resources.

• • •

This paper proposes that major civic organizations might reframe their relationship to young citizens from one based on the check-writing logic of media politics to one more amenable to the preferences of young digital citizens. However, we found that the efforts of many civic organizations to communicate with young citizens were likely to fall flat. Most of the time, most organizations used their Facebook presences mainly to distribute newsletter-style notices to followers and offer links to consistently self-referential content. Even within a social networking environment highly imbued with a digital ethos of participation and bricolage, organizations seemed to be aiming to establish narrow broadcast relationships with their audience—essentially employing the logic of a previous information paradigm within a medium potentially suited to the contemporary one.⁴⁶

Where we did see more potential was among newly formed, online-based civic organizations. In line with our expectations, these groups appeared most adapted to an actualizing style of interacting with potential supporters. This should spur further interest in these types of organizations and their work in engaging young people. However, there are limitations to these kinds of organizations: Karpf, for example, despite celebrating the case of MoveOn, suspects that its loosely bounded membership structure and issue opportunism are not substitutes for the everyday connection building and advocacy of older-style civic groups.⁴⁷ Kreiss et al. similarly question the degree to which we should embrace postbureaucratic civic organization.⁴⁸ In the U.S. context, membership organizations have historically been major contributors to civic stability and engagement. The future of these groups, and their forays into networked digital communication, also deserve our continuing attention.

The era of digital media may hold the potential for civic organizations to reinvent their relationship with young

constituents within the norms of the emerging information paradigm. Some pioneering organizations appear to be doing just that; what we also see, however, in the Facebook study, is that many organizations find this transition difficult. The communications documented fall more in line with our understanding of the civic information habits and preferences of citizens of the last century's mass-media era rather than those of contemporary young citizens. These results have significant implications for the study of youth engagement, the nature of civic information and communication in the digital era, and the practice of fostering engagement online.

NOTES

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10. Jay G. Blumler and Dennis Kavanagh, "The Third Age of Political Communication: Influences and Features," *Political Communication* 16, no. 3 (1999): 209–30.

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12. For example, see danah boyd, "Why Youth (Heart) Social Network Sites: The Role of Networked Publics in Teenage Social Life," in *Youth, Identity and Digital Media*, David Buckingham, ed., The John D. and Catherine T. MacArthur Foundation Series on Digital Media and Learning (Cambridge, MA: MIT Press, 2007), 119–42; Mizuko Ito et al., *Hanging Out, Messing Around, and Geeking Out: Kids Living and Learning with New Media*, The John D. and Catherine T. MacArthur Foundation Series on Digital Media and Learning (Cambridge, MA: MIT Press, 2009); Palfrey and Gasser, *Born Digital*.

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Your Promise Is Your Brand: How to Work It

by Carlo Cuesta and Padraic Lillis

WE WILL PUT A MAN ON THE MOON BY THE END OF THE decade.” This declaration by President Kennedy is considered one of the most effective national promises ever made. Not because we were fascinated by the moon, or space, or even science, but because it allowed us, as a nation, to lift our eyes to the heavens and dream. It gave us an aim. More important, it created a sense of pride by getting us to hold our heads up high—and to recognize the possibility that resided in our country’s best efforts.

The most important word in President Kennedy’s statement is the first one: “We.” The moon immediately became a shared goal that could only be achieved through an effort in which everyone participated. Only one or two of us might actually get to set foot on the moon, but it would take *all* of us to get them there. The passion of achieving that dream may not have been visible in our daily activities, but it was more than evident as the country huddled together around the television that hot summer day to watch the astronauts fulfill their promise.

Similarly, an effective organizational promise is identified

through an honest assessment of ability, opportunity, and desire. Tapping the collective aspirations of board, staff, and community partners can inspire a bond, motivating the whole to expand their thinking beyond the routine of their individual roles and recognize the exciting places their shared effort can take them. With such compelling internal clarity, a nonprofit’s organizational promise can have a profound impact on how value is delivered and communicated. The promise elevates the organization’s brand identity by giving context to the relationship it is building with participants and supporters.

More than 10 years ago County Memorial, a full-service, acute care hospital serving eastern Montana, changed its name to the Sidney Health Center. This re-branding effort brought the hospital, extended care, and assisted living facilities together under one moniker to offer the region a continuum of health services. What it failed to do, however, was change the relationship between the institution and those it served. A new logo and promotional campaign had little effect on a growing community perception that the organization, though essential to the region, was “a large, impersonal corporation.” There was a distinct disconnect between what the organization communicated to their participants and supporters and what it actually delivered. These perceptions, spread from person to person through casual conversations

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between families, friends, and neighbors, formulated a brand identity that superseded any marketing and communication campaign. This identity had become so dominant that it overshadowed many of Sidney Health Center's strengths and achievements; it also became rooted in the hospital staff's perception of their employer.

Identifying the factors that create negative perceptions is like unraveling a huge, knotted ball of string. The bottom line is that a negative brand identity often reflects a break in an organization's connection to its mission and the principles that guide its behavior. This lack of internal clarity threatens the fundamental health of the nonprofit—as a result, the institution offers less and less relevant value to participants and supporters. Making a promise builds a deep understanding among board and staff about the kind of value they should create and how it should be delivered. The main outcome of this work is an organization empowered to guide perception by producing results that are meaningful to the community it serves. Communication and fundraising efforts are then able to tie into a deeper theme as well as strengthen the organization's relationship with stakeholders by highlighting actions that speak louder than words.

Last year, the board and staff of the Sidney Health Center made a promise to deliver to the citizens of eastern Montana “exceptional personalized care.” Recognizing that the hospital's staff is the most important point of contact for patients and visitors, initial actions focused on small, yet significant, shifts in operating practices. Employees from across the hospital formed the *LIFE Team*, which has addressed customer service issues through an innovative service reward program.

Tips for Creating a Promise

- *Keep Participants and Supporters in Mind:* First and foremost, your promise has to be deeply meaningful to them.
- *Collaborate!* Effective promises grow from diverse points of view.
- *Make It Compelling:* Think beyond the next three years; consider what can be delivered and achieved over the next ten years.
- *Consider Your Capabilities:* Don't limit yourself to what you currently know or the resources you currently possess; recognize and plan to build on your strengths to expand what you know and possess.
- *Test It!* Share your promise. If someone thinks it is impossible, you are probably on the right track.

The human resources department revised their methods for creating job descriptions and evaluating employees by clearly stating customer service expectations. The finance department made changes to its billing and collection practices to create a department that can meet the needs of each individual patient.

In a short time, this shift in operations has created a sense of urgency and ownership in the human resources department to deliver and achieve the organization's promise. As it has been adopted, the promise has begun to manifest itself in impromptu daily interactions. For example, the radiology staff redecorated the room where mammograms are performed to create a warmer, less sterile environment, and the CEO shares responsibility with other senior staff to visit inpatients every day, delivering a newspaper and checking in to see how they are doing.

Their brand identity is beginning to shift as well. Hospital staff are reporting a greater sense of optimism among fellow employees in regard to their employer. Community members are also recognizing the benefits of the promise; this has been ensured by a marketing and communications department that is now empowered to guide patient and visitor perception.

When creating an effective organizational promise, a nonprofit should consider conducting a full assessment of its current brand environment. This is done by tracing the link between participant/supporter perception and the results generated by the organization; how results relate to board and staff capabilities; and finally, how board and staff capabilities frame a promise to take action based on the organization's mission and values. By recognizing how perceptions are formed and how they connect to the organization's mission and values, leadership is able to gain insight into how it needs to reposition its relationship with participants and supporters in order to strengthen the perceived value of their work. Formulating or clarifying a promise provides significant leverage in accomplishing this.

The moon may not be the desired destination for every organization, but there is tremendous value in declaring, as a group, what the “moon” represents. Through every step we took to get to the moon, the promise became less about the president who made it and more about both the people who strove to achieve it and the country it impacted. Acknowledging with one another the promise of what is possible creates a shared goal and gives value to each individual's skills, resources, and efforts.

Our Boards in Our Brands: An Aspiration

by Jeanne Bell

ONE OF THE MOST USEFUL NONPROFIT MANAGEMENT BOOKS OF this year is *The Brand IDEA: Managing Nonprofit Brands with Integrity, Democracy, and Affinity* by Nathalie Laidler-Kylander and Julia Shepard Stenzel.¹ As an executive director working systematically at the rebranding of the organization I lead, the authors' insights into the particular value and role of the nonprofit brand could not be timelier. What I didn't expect was how much the book's concepts would challenge me to think differently about the composition and focus of the nonprofit board of directors, including my own. I serve on multiple boards, have numerous boards as clients, and report to a board of directors, yet struggle to define and tap the full purpose of a nonprofit board. I am certainly not alone. Many have written eloquently in these pages in search of the board's value beyond the fiduciary—David Renz and Judy Freiwirth, to name just two governance thought leaders. Though Laidler-Kylander and Stenzel did not set out to write a governance book, their elevation of the significance of nonprofit brands and their nonprofit-specific framework for brand management may yet provide a very useful way to think about who serves on our boards of directors and what orientation they can best

bring to that most ephemeral of leadership roles.

To explore the power of brand as an organizing principle for boards of directors, I have selected three of *The Brand IDEA*'s core concepts and considered their implications for how we compose our boards and orient their individual and collective work, finding the conceptual elements of brand and brand management to be strikingly germane to what the board as a collective and its individual members need to embody, continuously understand, and extend broadly across an organization's constituencies.

1. Brand Definition

"An identifier and concept that imparts information and creates perceptions and emotions."²

2. Brand Value

"We [...] have observed [...] a paradigm shift in the way nonprofit actors perceive and understand brand. This shift has led to a view of brand not as a fundraising tool but as a critical strategic asset, one that embodies the organization's mission and values and supports broad participative engagement and collaborations that maximize impact."³

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3. Distinction between Nonprofit and For-Profit Brand Management

“The brand IDEA differs from for-profit brand management in three fundamental ways: first, brand is focused on the mission rather than on consumers; second, positioning is used to gain organizational clarity and to support collaboration rather than to gain competitive advantage; and third, control is replaced by participative engagement.”⁴

Brand Democracy and the Board’s Purpose

The authors describe brand democracy as in place when “everyone develops a clear understanding of the organization’s core identity and can become an effective brand advocate and ambassador. Every employee and volunteer authentically and personally communicates the essence of the brand.”⁵ How much time have we wasted in our sector helping board members memorize mission statements, or, more typically, lamenting how long and un-memorizable they are? What if, instead, the request of board members was to deeply understand the current and aspirational brand of the organization and to be the über-ambassadors for it? What if each board member took on the core identity of the organization as his or her own leading up to, during, and well beyond board service?

That is the essence of brand democracy: being part of the core identity of an organization is no longer limited to specific people on an organizational chart or to finite term limits—it can’t be contained that way. So instead of reading reports at monthly meetings about the *staff’s* communications efforts, for instance, board members would be a part of the data set: blogging, tweeting, and making public appearances themselves. In this vision, the board is an invaluable multiplier of the staff’s voice, and because its members’ skillful ambassadorship is volunteer based, it has a special credibility and resonance all its own. Taking this idea to its fullest, the monthly or quarterly board meeting as the core place where board members “show up” becomes increasingly anachronistic. If board members are the agents and models of brand democracy, their true value is out in the field every day. Perhaps board meetings become focused primarily on equipping members for their fieldwork ahead.

Brand Identity and the Board’s Composition

The authors write, “When the brand is anchored in the mission, values, and strategy, the identity becomes the internal reflection or collective perception of *everyone* in the organization, and captures the very nature or *raison d’être* of the organization itself [*italics mine*].”⁶ If we really mean everyone—not only paid staff—then the implications of brand identity for

board composition are significant. It’s my experience that many potential board candidates will feel aligned with the mission of an organization—able to say with conviction that they care about climate change or youth access to the performing arts, for instance. But what if the request of board members is something much deeper than that? What if the request is not only that you care about the cause but also that you embody the organization’s values and can discern and articulate the particular value of its chosen strategies? If it is the latter, I suspect the potential pool of appropriate board members for a given organization gets quite a bit smaller, and, moreover, I suspect the board candidate screening approach becomes more similar to that of senior staff in the depth of alignment sought than to the classic board recruitment matrix, with its requisite attorneys, accountants, and community power brokers.

Indeed, Laidler-Kylander and Stenzel spend considerable time on the centrality of values to brand and brand identity: “This idea of living the values is connected to how authentic an organization and its brand are perceived to be.”⁷ This suggests two things: first, that organizational values have to come “out of the closet” and mean something every single day to everyone in an organizational system; second, that a frank discussion of values has to be the *first* conversation with potential board members—and nonalignment a deal breaker for service—rather than arising from the orientation processes for already appointed directors. I can imagine a more cautious interpretation here—the argument that organizational values are distinct from personal ones. But from the perspective of board members as the ultimate brand ambassadors, I disagree. If an organization’s values feel academic at best or anathema at worst to a board member, how can she embody and express the brand’s identity in all of her organizational ambassadorship? I don’t think she can. If they are academic to her, she will likely avoid any explicit expression of values in the course of her ambassadorship; if they are anathema to her, she might even actively contradict them in the course of her ambassadorship. In either case, the organization’s brand is fundamentally undermined.

As a leader in the midst of re-branding at a forty-year-old organization, to me the authors’ assurance that it is not uncommon for the external image of an organization’s brand to lag behind its more rapidly changing internal brand identity is comforting.⁸ But here again, from a board composition perspective, what if board members were chosen especially to shorten that lag? What if, in board recruitment, we sought people who were so attuned to the aspiration of the brand that their board membership accelerated the closing of the gap between internal identity and external perception? Given

how many organizations across all fields are in states of mild to severe disruption, this becomes an exciting board recruitment criterion: how credibly and enthusiastically would this candidate embody and extend the aspiration of our brand? Imagine the real danger of the alternative scenario: the staff continues to craft the new internal identity and the board propagates itself with members identified with a brand gone by. Given typical board member terms of six years plus, the *internal* lag in brand clarity could be seemingly interminable and have serious consequences for the board's utility in strategic thinking and resource development.

Brand Affinity and the Board's Judgment

The notion that a mission statement “keeps a board grounded” as it contributes to strategic thinking and decision making is in dire need of replacement, and I think brand is extremely useful here. This quote from one of the authors' interviewees resonated immediately: “We are becoming much more explicit about Breakthrough's methodology, about our approach, and not just the issues we care about and our end goals, but being clear with ourselves and with others about who we are and how we think, that this is our methodology, this is what we want to do.”⁹ We gather that their mission, per se, has not changed, but how they approach it has, and thus how they want to be understood has. That is brand. I think of the implication for the board as having to do with the quality of their strategic judgment individually and as a collective.

The authors explain brand affinity as having two elements: “Brand Affinity comprises two sets of actions. First, armed with a clear understanding of the theory of change and brand identity, the organization identifies partners, reaches out, and uses brand to attract them. Second, brand Affinity includes using the brand to enhance the effectiveness of these partnerships in achieving mission and maximizing impact.”¹⁰ If a critical element of a board's job is to identify new partnerships (and here I would include identifying long-term donors and future board members, as well as collaborators), the board members' judgment in parsing which potential partners are a brand match is essential. I have seen far too many executive directors managing relationships forced upon the organization by a board member who doesn't respect the notion of nonprofit brand. The request of board members is more nuanced in this vision; their entire network of relationships couldn't possibly be brand aligned. So the request is that they are continuously discerning what relationships they can forge or steward for the organization that optimize brand affinity.

What about the Money?

I can imagine resistance to this notion of brand as the organizing principle for the board, especially where it concerns money—namely, who is going to raise it and who is going to oversee it. If we are disciplined in composing our boards to brand, will we have enough people to participate in fundraising and to exercise the board's fiduciary responsibility effectively? Like the board meeting as the board's primary venue for “showing up,” the beliefs that only power brokers can raise money and only certified professional accountants can achieve real financial literacy are outdated. To be clear, if a power broker or CPA is brand aligned, that's wonderful, and he or she can be invaluable to an organization; but the idea that status or professional skills should trump brand alignment is, I believe, a costly compromise that organizations have been making for far too long. To take the critically important issue of fundraising, for instance, what Simone Joyaux has written persuasively in the *Nonprofit Quarterly* is that we are looking for long-term donors: individual giving success is measured in the lifetime value of a donor, not in “one-and-done” gifts.¹¹ I would place my bet on a brand-embodying board member over a dispassionate power broker to identify and cultivate brand-aligned donors, who logically would be more likely to become lifetime donors.

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Looking back over the work my colleagues and I have done together to evolve our organization's programming and brand, I see all of the elements of *The Brand IDEA* in play, though of course we didn't have the authors' very helpful language for what we were doing. As I write, the board members who have stayed and changed with us are in the process of recruiting a new cohort of board members. *The Brand IDEA* has given us a powerful framework and inspiration to invite people onto our board with as much passion as we have not only for our mission but also for the particular ways we aspire to achieve it—that is, for our brand.

NOTES

1. Nathalie Laidler-Kylander and Julia Shepard Stenzel, *The Brand IDEA: Managing Nonprofit Brands with Integrity, Democracy, and Affinity* (San Francisco: Jossey-Bass, 2014).

2.–10. Ibid., 35; 19; 29; 11; 66; 71; 81; 101; 100.

11. See, for instance, Simone Joyaux, “Donor Fatigue' an Excuse for Poor Fundraising Practices,” *NPQ*, March 15, 2013, www.nonprofitquarterly.org/management/21961-donor-fatigue-an-excuse-for-poor-fundraising-practices.html.

Two Masters of Communication Discuss the Branding (or Not) of the Nonprofit Sector

by the editors

A LONG WITH THE REST OF THE SECTOR, THE *NONPROFIT Quarterly* has sat through any number of meetings where the subject of the odd, defined-by-a-negative nature of our sectoral name comes up—most often in relationship to the latest idea about how to convince the public of the overall value of nonprofits to communities, democracy, and the future of the world. So we decided to explore this issue of sectoral “brand” with two of the more outspoken and iconoclastic people we know: Jan Masaoka, CEO of the California Association of Nonprofits, former executive director of CompassPoint Nonprofit Services, and founder of Blue Avocado; and Jon Pratt, executive director of the Minnesota Council of Nonprofits.

If we think of “brand” as the commonly understood characteristics of the identity from which we address others, then “brand” is less what we want people to know about us than it is what and how messages that we and others send are received. This means that forcing a change in perception can be difficult without a change in essence. On the other hand, there is the Johari window communication model, which takes as one assumption that there are things we know about ourselves that others do not know about us. Communicating authentically from our essence sends a message of integrity and trustworthiness—and, in fact, the

nonprofit sector is in pretty good shape where those two characteristics are concerned.

Noting that industries very seldom have brands that they are in control of, Jan Masaoka wonders why so many of us keep torturing ourselves over the question of sectoral identity: “The coal industry keeps trying to talk about itself as the energy industry—but nobody is ever in control of their sector, though maybe they would like that to be different. I have relatives in farming, and there are constant arguments in the farming community. They say things like, ‘Oh, those almond people in Southern California! If they would just stop saying such and such, everybody would buy more almonds.’ You know, you can control what the almond cooperative board is messaging, right? But you can’t control the almond *industry*.”

Still, this does not stop people from trying, and Masaoka goes on to give some examples of things done around branding that *haven’t* worked—like the whole name thing: “Every couple of years, somebody says we need to change the name of the nonprofit sector. And he or she has a proposal, and it doesn’t stick, because it’s very hard to control language. It’s also very hard to influence language, right? Look at how hard the Kleenex people are trying to get everybody to say ‘facial tissue’ instead of ‘Kleenex.’ And Peter Drucker and Peter Hero both took on the naming game. Peter Drucker suggested that

the sector be called ‘the human change sector,’ because it’s about changing people; but of course some environmentalists and some animal people said, ‘It’s not just about changing people!’ And then Peter Hero, who for many years was head of the Silicon Valley Community Foundation, thought that we should change the name of the sector to ‘public benefit corporations,’ or PBCs for short. So, for a long time, during Peter’s tenure, if you were in Santa Clara County, everybody would say, ‘I come from a public benefit corporation.’ And then, of course, five minutes after Peter resigned, everybody stopped using that and went back to a word that everybody could understand: ‘nonprofits.’ And then Robert Ross, from The California Endowment, has made a very large effort to get people to say ‘the delta sector.’”

Even leaving names aside, Masaoka thinks that it might be difficult to be successful with intentionality on branding beyond an individual company or a group of companies, and suggests we think in terms of “impression” rather than “brand.” “People have an *impression* about the wine industry and about agriculture,” she points out—but neither one has a *brand* as a whole.

Jon Pratt agrees that in general there is no controlling a brand by force, but he thinks that the impression can be guided and moved. The impression of the nonprofit sector that the public often seems to have, he says, is vague but positive, involving “well-meaning, unbusinesslike, low-resourced people who are motivated by good intentions and so can, for the most part, be trusted to try to do the right thing after extensive deliberation—though perhaps inefficiently.” This, according to Pratt, is not the worst news in the world; in fact, that the term “nonprofit” generally has positive associations for people ought to be celebrated. “The public has a higher confidence in nonprofits than in government or for-profit business,” he reminds us. “Mostly, people do not think we will violate them, although possibly some faker masquerading as a nonprofit may.” Adds Masaoka, “In California they even give nonprofits higher marks on job creation than government or for-profits, so we shouldn’t feel that our ‘brand’ or ‘impression’ is so terrible. It’s actually pretty darn good.”

“The word ‘nonprofit’ is the descriptor in state and federal law, and like it or not it is what these organizations are called,” says Pratt. “But what we could do is to increase public literacy about what these organizations are—and are not. American students get civics lessons in fifth through ninth grade and are taught about the structure and roles of business and government—but not of nonprofits. Going back to the question of our control or lack thereof over the public’s impression of nonprofits, I think in some ways it’s

beside the point. If you’re worried about brand or communications, maybe you have other issues that you should be focused on. ‘Nonprofit’ is not a perfect name; and, in fact, my vote would be to call nonprofits ‘associations,’ which would emphasize the relationship nature of these organizations. But the time has passed. They’ve been anointed nonprofits.”

On the other hand, the image of nonprofits as slightly ineffectual with respect to things like financial management is widely held, notes Pratt, and may erode our credibility at times. “That assumption of weak financial management is a generalization that in most cases is not true and is probably just as true among business as it is among nonprofits, but the impression is there. But if we understand that, it might be possible to take on one specific aspect of that kind of impression and do a drumbeat about the practical financial management skills we have in this sector and the difficult business models that we put them to work on, often quite successfully.”

Masaoka believes that the same kind of impression exists about boards—“yet almost every single reform for corporate boards that was enacted into law through Sarbanes-Oxley was a reform that was already in place and long-term standard practice in nonprofit boards.” Nonprofits often respond to these kinds of assumptions, says Pratt, by sending out messages touting standard ratios for fundraising costs as well as overhead ratios that all too often have been manipulated in some pretty inventive ways—a practice that has the unanticipated consequence of implying that the one organization is an exception and stands above its slacker colleagues. Instead, Pratt thinks nonprofits need to get behind bold affirmations that the sector agrees the public should recognize as descriptive of nonprofits as a whole, suggesting that a lesson might be drawn from the rebranding of small business that started during the 1950s, when small businesses were seen as “the people who couldn’t cut it in the big business world—think *Death of a Salesman*—and the businesses that just could not go any further. And they turned it around to ‘businesses with main street values,’ ‘people with entrepreneurial spirit,’ and ‘job creators.’”

In the end, Pratt and Masaoka agree that, as discussed at the start, the sector’s reputation/impression/brand is the cumulative aggregation of all the contacts between us and others, as well as the messages received over a period of time about us—and not just from this sector, but from everywhere. Understanding the impressions (or lack thereof) that the public holds as a result of all of this provides us with some traction to build communications strategies, but the message must be authentic and believed by nonprofits themselves.

Mission, Message, and Damage Control

by Kim Klein

Editors' note: *The following was adapted from Reliable Fundraising in Unreliable Times (Jossey-Bass, 2009), in which the author shares strategies for surviving and thriving in any economy. The book is filled with practical advice on short- and long-term fundraising strategies and on issues that have an impact on fundraising, such as the role of nonprofits in working for the common good, the role of taxes in creating a just society, and the need for new organizational forms to accomplish nonprofit work.*

IN HARD TIMES, PEOPLE BEGIN TO POSE FALSE CHOICES: “WE CANNOT go to the movies until there is world peace, we cannot have a ballet until there is no homelessness, we cannot save birds until all children are well fed.” They see cutting funding, pulling back, as the only way to respond to the economic downturn. The more people react in this way, the more it seems they have taken some kind of sourpuss vow: they will not laugh until oppression has ended.

In fact, there is enough money for all our nonprofits. Granted, to get them all funded will require rethinking national priorities and a redistribution of wealth, but there is no shortage of money.

The case statement is the cornerstone for raising money effectively, the message is specific to the moment; it simply shows the world that you have read the paper, listened to the news, and are conscious of what is happening around you. It places your work in the context of the larger world. It faces current reality squarely.

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An affordable-housing group believes people should be able to live in the community in which they work. When the organization launched, its community had low unemployment, but people commuted from nearby towns because housing near their workplace was so expensive. Two years later, the community has high unemployment and people are losing their homes because they can't pay their rent or mortgage. The affordable-housing organization maintains the same mission: “People should be able to live where they work,” but now it institutes other actions to fulfill its mission. To help people stay in their homes, for example, the organization creates an emergency loan fund so people can borrow money easily for housing costs and works with local banks to stop foreclosures. Its message is “We make sure that losing your job does not mean losing your home.”

The organization's mission is the same, but the message reflects what is happening with housing in the community. It also reflects some very hard work on the part of the board and staff to create these new programs.

Here's another example of a distinction between mission and message that a youth symphony orchestra uses to avoid a crisis. This well-regarded group serving a large geographic area has as

its mission: “We believe children who have musical talent should be able to develop it as fully as possible and the community should benefit from the talent of its younger members.” Suddenly, two sources of funding are threatened: a state arts endowment grant is cut, and a foundation the organization had counted on has more pressing needs to fill. Just as the group loses its funding, the number of children signing up for its summer music camps and trying out for its programs increases. The organization realizes that many kids are eager for a musical education that the public schools no longer offer. While the group’s mission remains the same, it adjusts its message to be more compelling during these times: “Children should be musically educated. We augment the work of the schools in providing musical education for children.” This message puts forth the organization’s belief that the public schools should provide music and art education.

Next the organization forms an advocacy task force with parents and board members to pressure the legislature to find money for music education in the public schools. In the meantime, it continues to meet an immediate need. When it presents this point of view to its funder, the funder reconsiders and restores the grant. With its new message, the group can also attract donors who may not be that interested in music but who agree that music should be part of children’s education.

Mission is forever, but message is more urgent and immediate.

Underlining all my recommendations about developing your message is my firm conviction that you are always best off telling the truth and only the truth. But you may not be telling the whole truth until you are sure that you know it. In big crises, truth has a way of changing with time and who does the telling.

When Message Is Damage Control

When an organization is in an internal crisis, the message is more along the lines of damage control: explaining what happened and making sure that everyone who should have the information he or she needs.

An organization has a history of sloppily kept or nonexistent donor records. Gifts are often not recorded properly, people are not thanked or are thanked for the wrong thing, donors are “reminded” of pledges they have not made. A new development director has been hired to improve the situation, and the message has gone out to board members that these problems have been resolved. But early in the new development director’s tenure, several events cause the board to question whether record keeping has actually improved. First, a major donor tells a board member that his pledge form commits him to a \$10,000 gift when he pledged only \$5,000. The executive director speaks to all parties; though the development director

insists the pledge was for \$10,000, the donor is equally sure it was for \$5,000. The executive director changes the pledge form, reassures the development director that this donor has been inconsistent in the past, and alerts the board member that this was probably not a record-keeping issue. Next, the development director seriously overstates the return on a direct-mail appeal. When the discrepancy surfaces, he claims that his math was faulty because he was so busy entering respondents into the database that he figured out the percentage of response in his head. The third month, the development director announces an impending grant for \$25,000. When the executive director calls to thank the foundation funder, she learns no such grant has been proposed, nor is one forthcoming.

Now the executive director realizes that the previous “truth” of bad systems has been overshadowed by a bigger current truth: the development director is a liar. She fires the development director immediately and calls the board chair, who informs the board members of what has happened. The executive director talks to the two other staff members. They and the board chair agree that the message will be as follows: “We were unable to get accurate information from the development office. Since the development director was on probation, we have terminated his contract.” The board members and the staff will know more specifics, but no one else needs to.

The executive director lets the foundation funder know that the development director has been terminated because he gave misleading information and asks the funder to pass the information on to anyone who needs to know. This funder is a reliable and trusted member of the funding community and likes this group. Her word among funders and major donors that things are being handled properly is important.

This organization averted a more serious crisis by handling the situation immediately once it understood what had taken place. During this crisis, only a few people really needed to be involved, but they were kept informed all the way. By enlisting a trusted messenger—the foundation funder—the organization controlled fallout from the development director’s actions.

Getting the Board and Staff on Board

In crises, we often focus on the opinions of people outside the group: donors, clients, even the general public. Yet our greatest difficulty in forming a message and relaying it is often at the board or staff level. It is critical that board and staff believe their opinions are welcome; further, they must not feel that they are being asked to lie or be evasive with others. Board and staff must be involved in the process of exploring options and discussing all the points of view, or they can quickly feel stifled. In one such situation, the board

chair explained to a major donor, “I’ll tell you what I am supposed to say and leave you to read between the lines.” His explanation was lost; the message “I leave you to read between the lines” overshadowed other information. One funder reported to a small group, “Even the board chair just says, ‘Read between the lines.’” Needless to say, this is not good message development.

Your message should not be evasive or vague. If there are legal issues involved, ask your lawyer what you can say and what would be legally dangerous or off limits. But if there are no legal issues, figure out how you can tell the whole truth but also emphasize the mission of the group. Message development may take some time and may bring important discussions to light as the crisis develops and is worked through. The process of developing the message can also be part of the message, particularly when part of the board has divergent opinions, as in the following example.

An after-school program for teenagers provides a basketball court, a bank of computers for doing homework, an art room, and volunteer adult counselors. Half the funding for the program comes from the local department of parks and recreation, and the other half from the business community and a cross-section of parents. The program has one paid staff person and 50 volunteers; its budget is \$150,000.

The parks and recreation department is forced to make serious budget cuts in its programs, resulting in a cut of \$50,000 of its grant of \$75,000 to the after-school program. Because of the economic downturn, some businesses also cut back on donations to the program. In a matter of months, the organization suffers a 40 percent decrease in funding.

The board calculates that it can run the program at its current level for six months while it figures out how to raise more money. It announces to the parents and students, “Everything is fine right now. We are seeking other sources of funding, and we encourage each of you to give and help raise money.”

As the board works with the executive director to create a fundraising plan, philosophical differences develop. Many board members worked hard to advocate for government funding for the program. The mission of the organization—“Teenagers are a community asset and need to be nurtured”—implies that the government has a role. These board members feel that even if the program could be sustained with private donations, it shouldn’t be. It would be more principled to close it. “That’s not fair to the kids,” says the other faction. “We have to try to run the program on less money or raise money elsewhere.” The board is further split when one member suggests renting part of the space to Armed Services recruiters, supporting the view that the Armed Services offers good jobs

and scholarships for kids, along with possible income for the program. Longtime peace activists in the group are appalled at the potential sellout. Two months pass, with each faction becoming more firmly entrenched and with no money being raised and no plan formed for cutting expenses. The message “We are exploring options” has worn thin, particularly as the various arguments are put forward to the parents, students, and business community. Everyone has an opinion.

The board decides on a bold course: get community input on the various options. The board writes a short letter to parents, teachers, businesspeople, and the community at large presenting the dilemma and inviting them to a meeting: “How do we best show how much our teenagers mean to us? We believe our program deserves government funding. But in these times, that kind of funding is not available. If we are to replace our lost grant, we must have help from the entire community.”

About 50 people attend the meeting and meet for four hours. At the end, consensus is reached: the program will seek private funding, but the city council will be asked to pass a resolution declaring the program a city treasure. Seeking government funding will be a top priority. The center will not be available to the Armed Services or other recruiters. As has always been true, employers can post job announcements and anyone can post announcements of scholarships, internships, and volunteer or job opportunities.

The message generated during the meeting is simple: “We have chosen to put teenagers ahead of all other concerns. We believe teenagers are a community asset, and we as a community pledge to keep this program open.” By going public with their differences, this organization ensured that differences of opinion about the future of the center could be reviewed in one place at one time and be resolved.

Delivering the Message

The process of creating a message cannot be separated from the process of creating a response to the crisis. But groups usually cannot wait until a full response is put in place before putting forth a message. Donors, staff, and the public need information about what is going on with the organization.

The message that you start with, then, should involve the least amount of truth you can deliver without appearing to hide something. In fact, part of your message can be that you will send out additional information as it becomes available. Don’t be nervous to admit that you don’t know everything yet. It is better to have “not knowing” be part of the message than to say something that turns out to be false and have to issue a correction. Further, the message cannot be separated from the messenger. Finding well-respected and trustworthy

people to help you deliver your message is just as important as the message itself. They can deliver the message and then conclude (assuming they feel this way), “I think everything will be fine” or “I have a lot of confidence in the team of people who are working on this.” Finally, fundraisers always have to take into account that there is an order in which the message will be delivered. Make sure that you don’t inadvertently alienate someone simply by not informing that person of the situation early on.

Like the response to the crisis itself, the process of delivering the message involves several parts. Make a list of those who need to hear about the crisis first. In addition to board and staff, think about anyone who considers themselves close to your organization: that is, the organizational “family.” This includes active volunteers, longtime funders, longtime major donors, and former staff and board. In choosing whom to tell first, don’t create such a long list that you then spend time calling people rather than planning. These close-in people are also often those you will approach for donations. Remember, you can always tell someone, but you cannot untell that person. When in doubt about telling someone, wait.

Next, identify who should deliver the message to these people and how they should get it. Generally, those who are told are told through a call or a visit. Avoid e-mail, which can be forwarded easily, may take on a life of its own, and can create meanings that would not be present if the message were delivered personally. Longtime donors, funders, and volunteers make great messengers. Board members—particularly the chair of a board—can deliver the message but may be perceived to be too close to the situation, possibly involved in creating the problem, and too defensive. Major donors are usually told by those who have solicited gifts from them in the past. The people who are told first can be enlisted to tell others. Since these people will probably want to tell someone anyway, this approach provides some control over message delivery.

Institute a regular way to keep the people on the list updated about what is happening. As in many crises, if the situation unfolds over time, create a phone tree to keep people up to date. At this point, you can create an e-mail newsletter, but remember: anything you write in e-mail can wind up anywhere—at the office of the FBI, on the front page of a newspaper, or in the inbox of the person you have fired. E-mail needs to be considered public information and no amount of marking it “CONFIDENTIAL” can change that.

Talking with Major Donors about the Crisis

In a crisis, major donors need attention and reassurance. When an organization is in a crisis, the donors who agree to talk with you—even on the phone—need reassurance that

their gift won’t go down the drain. Will you raise the money you need? Will you be back next year with yet another crisis? Do you know what you are doing? How did you get into this mess in the first place?

Even if they are not able to articulate it, most donors realize that a crisis is not just a big problem in an otherwise smoothly functioning organization. While what caused the crisis may not be your fault, a crisis has a longer history than the crisis event.

The following four tips can reassure almost all major donors; and you may need just one or two to reassure them effectively. These four elements are an explanation, a plan, evidence of other donors, and an escape clause.

An explanation. Major donors are like family. In a family, when someone has a heart attack or a couple decides to separate, relatives expect more information about the situation than, say, a neighbor. And part of major donors’ insecurity is that, if it could happen to you, are their other beneficiaries far behind? Explain to these donors what has been told to others close to the organization. Don’t launch into a long explanation, but allow the donor to ask you what he wants to know and be open to the donor’s questions.

A fundraising plan is a source of reassurance because it shows that you have thought through what is required in the coming months to move beyond the crisis. Your plan should be as realistic as possible. But plans also shape reality, so your plan needs to be optimistic. Be prepared to show the prospect your cash-flow chart and a strategy-by-strategy description, including gross and net incomes for each strategy. Show your gift-range chart, and talk about how many other prospects you have.

Help from other donors. Evidence that others have bought into this plan is important. As you receive gifts, ask whether you can share the donor’s name and size of gift with other prospects. If a donor knows that Manuel has given \$5,000, and he respects Manuel, he is more likely to make a gift. For donors that are reluctant to share their name and gift amount, you can always tell a prospect, “Two other donors have given \$10,000” without using their names. Having board buy-in is also critical. Even if board members cannot be major donors, you need to be able to say, “One hundred percent of our board members have made a gift that is significant for them to demonstrate their faith in our future.”

An escape plan. Some donors need a contingency; they will give only if certain things happen. But a way out should be offered only when a donor indicates that’s what it needs to pledge a gift. If an organization follows through on the three elements above, most donors do not require this fourth element.

What does an escape plan look like in fundraising? Let’s say you approach someone for a lead gift of \$10,000 on a \$100,000

goal. The person is committed but hesitates, asking questions about where the other \$90,000 will come from. Ask how close to the goal of \$100,000 your organization must be for the donor to believe that the campaign will succeed. Some will say, “If you had half of it, I would feel better.” Others will say, “If you get one more big gift, I would feel better.” Offer the donor the option of pledging conditionally. A challenge gift is a great motivator. Sometimes the challenge is not about the amount of money but who gives it. A donor may say, “I’d feel better if I knew Fred was in. He is so smart about these things.” You would then say, “Can we get back to you after we have talked with Fred?” Go even further and say, “Can we tell Fred you said this?” When you approach Fred, tell him that his leadership gift will lead to another gift. Finally, some donors want to give some now and some when you raise additional monies from other donors.

Financial Scandals

Simply getting more donors is not reassuring to a prospective donor that wonders how your executive director managed to skim off \$75,000 over three years without anyone noticing. Moreover, it’s not helpful that the treasurer of the board knew about and tried to deal with the problem quietly. In the second scenario, how can a donor trust an organization’s veracity or judgment when it turns out that a program staff member filed a false report—a report that was signed by both the executive director and board chair? Their protestations that they didn’t have time to read the report do not make anyone feel better. In both cases, an enterprising young reporter has scooped these stories for the local paper, and they are the talk of the town (or that part of town that cares about these organizations).

Scandals are difficult to deal with because they break trust. Now, the question is not whether your plan will succeed but whether you really can fix an organization that has allowed such behavior. Returning to message, you should identify those who can say that your organization can be trusted and the problems are being addressed. Talk with these people. What would they need to see in the organization to confidently say good things about it or put money into it?

In a scandal, finding the context of the problem goes a long way in reassuring others that the problem can be solved. The executive director who skimmed \$75,000 from his organization had a gambling problem, for example. The treasurer of the board and a staff person knew the director was stealing but tried to deal with the problem quietly so as not to embarrass him. The director has now been fired and is in a recovery program. The organization

learned a lesson in how to deal with painful situations and has even allowed a consultant to write up its situation as a case study for other organizations. While context does not excuse anyone, understanding the context allows for compassion.

In the second scenario, context is even more important. The newspaper story rightly said that a staff person filed a false report. But what was the nature of the falsification? The staff person lied about the progress the organization had made on creating an earned-income venture. She claimed that a business plan was almost complete and the organization was ready to hire a staff person when those accomplishments were at least six months in the future. The executive director signed the false report—and the board chair went along—because he thought the project delays might cause the funder not to pay the second half of the grant. The executive director should simply go to the funder and say the project is behind. This will not be the first time the funder has heard that! Instead, he tried to operate in secret and in turn a newspaper reported that the organization had lied when in fact the error resulted from bad judgment. When the program officer of the foundation finds out what has really happened, she gives an extension on the grant and pays for the executive director to get executive coaching to help him make better decisions in the future.

In a scandal, donors need to know that the circumstances that created the scandal no longer exist and that the organization is thoroughly evaluating itself to ensure that nothing else is amiss. From a fundraising viewpoint, a scandal is hard to deal with and requires even more reaching out than other kinds of crises. Tell the truth, and tell it to those whom other people trust.

In the end, donors are your friends, and major donors are your family. They may not like what you do, but they will generally stand by you if they have enough history with you to know that this scandal is something you did—and not something you are.

Everything Comes Back to Mission

Creating a message during a crisis is relatively simple once the organization recommit itself to its mission. Program or fundraising direction may have to change because of the crisis, but that step is possible as long as a group of people cares deeply about the organization. If you see telling the truth as the only option, it limits what you can say. Don’t make something up or pretend something is true that is not. You will figure out who needs to hear the truth from whom, and when they need to hear it.

Donor Retention: What Do We Know and What Can We Do about It?

by Adrian Sargeant

IN THE TWELVE YEARS SINCE THE FIRST ACADEMIC ARTICLE ON THE topic of donor retention was published, the state of our knowledge has changed very little. Academic researchers continue to emphasize motives for giving rather than the determinants of switching or lapse, and even practitioner interest in the topic has been scant. The emphasis remains firmly on donor acquisition, with donor retention coming in a very poor second.

As a consequence, the sector continues to waste a substantial proportion of its annual fundraising spend. In 2001, a large-scale analysis of database records showed that even small improvements in the level of attrition can generate significantly larger improvements in the lifetime value of the fundraising database.¹ A 10 percent improvement in attrition can yield up to a 200 percent increase in projected value, as with lower attrition significantly more donors upgrade their giving, give in multiple ways, recommend others, and, ultimately, perhaps, pledge a planned gift to the organization. In this sense the behavior of “customers” and the value they generate appear to mirror that reported in the for-profit consumer sector, where similar patterns of value and behavior emerge. Indeed, the marketing

literature is replete with references to the benefits that a focus on customer retention can bring, including:

- **The reduction of marketing expenditure.** It typically costs around five times as much to solicit a new customer as it does to do business with an existing one. Acquisition costs through direct forms of marketing are high. This is particularly the case in the context of fundraising, where it typically costs nonprofits two to three times more to recruit a donor than a donor will give by way of a first donation. It can take twelve to eighteen months before a donor relationship becomes profitable.
- **The opportunities that existing customers present for cross- and up-selling.** Existing customers can be cross-sold other product/service lines or upgraded to increase the value of their future purchases. In the fundraising context, existing donors can be persuaded to upgrade their giving, make additional donations, purchase from the trading catalogue, volunteer, leave a bequest, etc.
- **The additional feedback that customers are willing to supply as relationships grow stronger.** Continuing contact can enable organizations to improve the quality of the service they deliver.
- **The good word-of-mouth (or “word-of-mouse”) advertising that successful relationships can generate.**

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Despite the potential advantages that enhancing donor retention can bring, the opportunity remains largely untapped. In 1997, a report identified that a typical U.K. charity experiences an annual attrition rate of between 10 and 20 percent of all supporters who make more than one contribution.² More recently, my own work broke the aggregate retention figure down to examine both cash and sustaining donors, concluding that a typical charity will lose 50 percent of its cash (i.e., annual) donors between the first and second donation and up to 30 percent annually thereafter. With respect to regular or sustained giving, annual attrition rates of 20–30 percent are common. Recent data collected by the Association of Fundraising Professionals (AFP) suggests that the pattern of retention in the United States may be even lower than that in the United Kingdom, with attrition rates in initial cash giving being reported at a mean of 74 percent.³

Given the scale of the opportunity, it seems timely to consider what we now know about the factors that drive donor retention as well as what other lessons from the wider marketing literature nonprofits might take into account in the pursuit of a loyalty strategy. While there may have been little academic interest in donor retention per se, research into the determinants of customer retention has continued apace. Therefore, below I review both the marketing and the fundraising literature in order to determine the factors most likely to drive switching (to another nonprofit) and/or lapsing behaviors.

Key Drivers of Loyalty

In order to understand what drives customer loyalty, it is necessary first to understand the evaluations, attitudes, and intentions that affect behavior. Marketing literature regards *satisfaction*, *identification*, *trust*, and *commitment* to be the primary drivers. Also important are “triggers”—situational, influential, and reactional factors with the capacity to cause a review of giving behavior and, as a consequence, drive switching or lapsing. Finally, it is important to comprehend what I call “value determinants,” and to focus on the key forms of utility that may be derived from the fundraising relationship. I believe this to be relevant, as some donors will consciously evaluate the service provided by a nonprofit and compare it to what could be achieved “in return” for their donation elsewhere. As will be explained further on, the benefit returned to the individual and the benefits delivered to beneficiaries are both at issue.

Satisfaction

Academics define customer satisfaction as a customer’s overall evaluation of the performance of an offering to date.⁴

It is now well established that satisfaction has a strong positive effect on loyalty intentions in a wide variety of product and service contexts. Satisfaction is viewed as the consequence of a comparison between expectations and overall evaluations of delivered service quality. In other words, people compare what they expected to get with what is actually delivered. They only experience satisfaction when their expectations are either met or surpassed. Recent work shows that the nature of the satisfaction-retention relationship can vary by such customer characteristics as demographics.⁵ For some the issue of satisfaction with the quality of service received is a more important determinant of loyalty than for others.

These studies suggest that, in the context of fundraising, donor satisfaction with the quality of the service with which they are provided (as donors) would drive subsequent loyalty, but the strength of this impact may vary by the profile of the donors in question. The position for nonprofits, however, is further complicated by the agency role that they play, and it is probable that both donor service quality *and* the perceived quality of service delivered to the beneficiary group may be at issue, since it may be argued that donors are in fact purchasing both. Empirical work has so far failed to address this issue and the nature of these interrelationships.

In the first study to address donor satisfaction, I identified a positive correlation with loyalty, with those donors who indicated that they were “very satisfied” with the quality of service provided being twice as likely to offer a second or subsequent gift than those who described themselves as merely “satisfied.” More recently, studies have confirmed this relationship, while in the latter simultaneously identifying a link between satisfaction and commitment to the organization.⁶ Work by Roger Bennett similarly shows that there is a significant and positive relationship between satisfaction with the quality of relationship marketing activity (in this case, relationship fundraising) and the donor’s future intentions and behavior, particularly the likely duration of the relationship and the levels of donation offered.⁷

Despite the weight of evidence that it is the single biggest driver of loyalty, few nonprofits actually measure and track levels of donor satisfaction over time. That said, a number of major charities are now measuring and tracking donor satisfaction, with a handful constructing supporter satisfaction indices that can be fed into their organizational reporting systems (e.g., a balanced scorecard). Managers are thus now being rewarded for changes in the level of aggregate satisfaction expressed. Given the foregoing analysis, this would seem a long-overdue practice.

Identification

Originally developed in social psychology and organizational behavior, the concept of identification is regarded as satisfying the need for social identity and self-definition. When a person identifies with an organization, he or she perceives a sense of connectedness with it and defines him- or herself in terms of the organization. As an example, someone might see him- or herself as a Greenpeace supporter, an environmental campaigner, or a “responsible person” when it comes to taking care of the environment. Unsurprisingly, studies have consistently shown that higher levels of identification lead to higher levels of loyalty to the organization and more supportive behaviors on the part of consumers. Researchers working in the domain of marketing have now shown that identification is a critical concept in driving loyalty in both membership⁸ and non-membership contexts.⁹

Despite its utility, the concept of identification is little researched in the fundraising context. In particular, we understand very little about what drives identification between a donor and the charities he or she supports. Although he has not specifically employed the term, Paul Schervish has shed some light on the issue of donor identification, arguing that a basic connection to a cause (e.g., being a graduate of a school) is not enough in itself to prompt subsequent donations to that school, and that some degree of socialization is required. This, the author argues, is experienced through “communities of participation,” and thus donors will be predisposed to give to causes connected in some way with these communities.¹⁰ This reflects many of the themes developed in the psychology and sociology literatures, where the concept of “we-ness” is seen as a spur to caring.

In an interesting twist, there is some evidence that emphasizing the development of identification may not always be an optimal strategy to pursue. Self-perception theory tells us that external triggers for giving, such as membership, or perceived membership, can cause a donor to discount any intrinsic motives they might have had, making it difficult to sustain that giving in the longer term—particularly when contact with that community comes to an end. Again, the need for further work to investigate the role of identification in fostering loyalty is clear.

A related strand of research has explored the issue of identification with a brand. As long ago as 1959, Sidney Levy noted that people buy things not only for what they do but also for what they mean. In electing to purchase brands with particular personalities, consumers can seek to convey representations of themselves and/or reinforce their self-image.¹¹ This may be particularly important in the context

of giving, since research has indicated that giving carries important psychosocial meaning and that “fundraisers should recognize that the philanthropy opportunities they provide represent identity props or tools for their donors.”¹² Donors are drawn to (and perhaps remain loyal to) brands that are perceived as having a personality encompassing values congruent with their own, be they actual or aspired. Similarly, Schervish has argued that philanthropy provides donors with the opportunity “to excavate their biographical history, or moral biography . . . and their anxieties and aspirations for the future.”¹³ The act of giving is therefore influenced by the individual’s perceiving not only the brand’s personality but also his or her own personality or self-conception, through the brand.

In 2006, I argued that in the voluntary sector context, brand personality is complex, and I identified three facets of charity personality shared by the sector as a whole.¹⁴ In a study of nine thousand individual donors, I found that only perceptions of personality characteristics grouped under the dimensions of “emotional stimulation,” “voice,” “service,” and “tradition” were capable of distinguishing between organizations. Interestingly, it is only these distinctive facets of personality that are linked to donor behavior, explaining a proportion of the variation in an individual’s charitable pot that would be received by a given organization as opposed to being split among the other organizations they support. The facets of an organization’s personality that have been linked to behavior are as follows:

- **Emotional stimulation.** Personality traits that have the ability to evoke an emotional response can be a source of differentiation. These might include such traits as “exciting,” “heroic,” “innovative,” and “inspiring.”
- **Voice.** Brands can also be differentiated on the basis of tone, as projected in the media. Is the organization perceived as “serious,” “bold,” “confrontational,” “challenging,” “impartial,” “balanced,” etc.?
- **Service.** The style or philosophy behind how an organization delivers its services can be an effective route to differentiation. Human service charities in particular might carve out a unique personality on the basis of such characteristics as “inclusive,” “approachable,” “dedicated,” “compassionate,” etc., in the way they deal with their service users.
- **Tradition.** Donors view some nonprofits as traditional, and may even regard giving as a duty, particularly during certain events or seasons. Who can deny the power of the Salvation Army kettles positioned outside shops across the United States around Christmastime?

In seeking to differentiate brand personality, it is important to remember that it is not appropriate to simply find different words to describe the organization. What is required is that the balance of the personality stand out from relevant local and national competitors for funds. These characteristics must also be perceived as desirable by donors and ideally have resonance with aspects of donors' own identity.

On balance, the literature on identification does suggest that nonprofits seeking to foster retention should think through the various identities that supporters might have, which the organization could seek to reinforce through fundraising and other communications. Aiding donors in fostering a favorable image of themselves, not merely because they are donors but also because of the values they aspire to or already possess, would be an effective strategy to adopt.

Trust

Successive studies have demonstrated trust's utility in driving customer retention—either directly or indirectly through satisfaction or commitment. Trust is built by the trusted party being seen to exercise good judgment, demonstrate role competence, adhere to a desired set of principles (e.g., a code of practice), and deliver high-quality service, possibly through high-quality interaction with front-line employees.

In the nonprofit context, Stephen Lee and I demonstrated that levels of trust drive giving behavior.¹⁵ More recent work in the nonprofit context confirms the relationship between trust and commitment, although it also suggests that this relationship is in turn mediated by “non-material benefits.” This is defined as “the belief that the nonprofit is making efficient use of its funds and having a positive impact on people for whom the funds were intended.”¹⁶ The model also stresses the significance of “shared values” and “communication,” both of which have the capacity to build trust. In their classic article, Robert Morgan and Shelby Hunt conceptualized communication as having three dimensions—namely, frequency, relevance, and timeliness.¹⁷ This was later extended by considering, in addition, informing, listening, and the quality of staff interactions.¹⁸

So, in the fundraising context, trust may be viewed as a driver of donor loyalty, and it, in turn, may be enhanced by:

1. Communicating the achieved impacts on the beneficiary group;
2. Honoring the promises—or rather, being seen to honor the promises—made to donors about how their money will be used;
3. Being seen to exhibit good judgment, and hence communicating the rationale for decisions made by the

organization with respect to its overall direction and/or the services offered to beneficiaries;

4. Making clear the values the organization espouses—so, communicating not only the content of service provision to beneficiaries but also the style, manner, or ethos underpinning that delivery;
5. Ensuring that communications match donor expectations with respect to content, frequency, and quality;
6. Ensuring that the organization engages in two-way conversation, engaging donors in a dialogue about the service that they can expect as supporters of the organization and the service that will be delivered to beneficiaries; and
7. Ensuring that donor-facing members of staff are trained in customer service procedures and have the requisite knowledge and skills to deal with inquiries effectively, promptly, and courteously.

Commitment

Relationship-marketing literature suggests a further driver of customer loyalty—namely, relationship commitment, or a desire to maintain a relationship. What these definitions have in common is a sense of “stickiness” that keeps customers loyal to a brand or company even when satisfaction may be low.¹⁹ It differs from satisfaction in that satisfaction is an amalgam of past experience, whereas commitment is a forward-looking construct.

It is now generally accepted that relationship commitment comprises two dimensions: an affective component (a strong and emotional attachment, i.e., “I really care about the future of this organization”) and a component specific to relationship marketing called “calculative commitment” (simply, the intention to maintain a relationship that develops because of a conscious evaluation of the costs and benefits of doing so). In the for-profit context, this would normally include an evaluation of the costs of switching supplier. There are risks inherent in doing this because, for example, their performance might not live up to expectations, and individuals have to spend time learning how to use a new variant of the product or service.

The reader will appreciate that this latter construct is probably of less relevance to the fundraising context, where the costs of switching one's philanthropy are typically negligible. The notable exception here is the realm of planned giving, but the role of commitment in this context remains to be researched.

Indeed, only one study has specifically addressed the issue of donor commitment, and while the authors support a two-dimensional model, they replace the calculative component with what they term “passive commitment.” In the study, a

significant number of individuals “felt it was the right thing to do” to continue their support, “but had no real passion for either the nature of the cause or the work of the organization.”²⁰ Indeed, some supporters, particularly regular givers (sustainers), were found to be continuing their giving only because they had not gotten around to canceling or had actually forgotten they were still giving.

These authors label the affective component of commitment as “active” commitment, which they define as a genuine passion for the future of the organization and the work it is trying to achieve. The literature suggests that this “active” commitment may be developed by enhancing trust, enhancing the number and quality of two-way interactions, and by the development of shared values. Other drivers include the concept of risk, which the authors define as the extent to which a donor believes that harm will accrue to the beneficiary group were they to withdraw or cancel their gift, and trust, in the sense of trusting the organization to have the impacts that it promised it would have on the beneficiary group or cause. Finally, the authors conclude that the extent to which individuals believe that they have deepened their knowledge of the organization through the communications they receive will also impact positively on commitment. The authors term this latter concept “learning,” and argue that it serves to reinforce the importance of planning “donor journeys” rather than simply a series of “one-off” campaigns.

Triggers

There are also triggers that can cause customers to reevaluate their relationship with an organization. These can be defined as *situational*, *influential*, and *reactive*.

Situational triggers are events that occur in the customers’ own lives and over which the service provider has no control. Factors such as the birth of a child, the death of a loved one, or an increase or decrease in income all have the potential to impact an individual’s charitable giving. A change in financial circumstances was the most frequently cited reason in donor “exit polls” in the United States and the second-most cited factor in the United Kingdom (the leading factor being a desire to switch giving to another cause or organization).²¹ More recently, a study of direct dialogue donors found that donors may lapse because of a change in financial circumstances, and that younger donors were particularly likely to lapse for this reason.²² As a consequence, the authors advise charities engaged in recruiting donors to sustaining or regular gift programs to focus on individuals thirty years of age or older. Individuals under thirty exhibit lower levels of loyalty than their older counterparts.

Influential triggers are those derived from the competitive situation. In the giving context, it may be that a donor is won over by another organization, perhaps because it is perceived to be doing worthier work or because the package of benefits available to its donors/members is more attractive. As was noted above, many donors will switch their giving between organizations; a typical direct-mail donor now supports an average of six charities, with those who have been subject to a reciprocal or list swap program giving to an average of twelve.²³

In the fundraising context, organizations seeking to maximize retention will wish to evaluate the merits of participation in list swap programs. Extant research indicates that lower-value donors (who are almost always the focus of such programs) can be just as likely to consider a bequest as other value segments in the database, and that once a list has been swapped, donors on that list will lose around 15 percent of their subsequent (annual giving) lifetime value. In deciding whether or not to participate in list swaps, it is therefore not as simple as comparing the immediate return on investment that accrues from the use of this technique as opposed to the use of traditional “cold” lists.

Reactive triggers are responses to the ways in which the organization interacts with the customer. In this sense, reactive triggers are more directly manageable than either of the other two categories, and as a consequence they have been the subject of a good deal more research.

To group our discussion, we will first look at those aspects of research that have considered the nature of solicitation itself, before moving on to consider issues pertaining to the acknowledgment of any gift.

Ken Burnett stresses the need to recognize individual donor motivation and to reflect such motives in fundraising communications.²⁴ While this may be difficult at the point of acquisition, it should thereafter be possible to focus on a particular donor’s interests and concerns. It appears, however, as though many fundraising solicitations are product focused, in the sense that they focus on the organization’s needs and are formulaic in approach. A recent study of fundraising solicitations identifies common arguments that revolve around the quality of the institution, the fact that an individual’s gift matters, and the beneficiary needs that will be addressed. That is not a donor-centric approach (stressing what donors can achieve through their giving and, subsequent to the gift being made, praising them for having had that impact); talking only about how great the organization is, is a serious mistake.

Much of the creative approach will adjust to respond to changing motives over the duration of the relationship. In acquisition marketing creative, the portrayal of the beneficiary

needs to be strong and emotive in order to make an immediate impact on a prospect donor and cut through the perceptual clutter of other charity appeals. In a bid to secure the all-important second and subsequent gifts, many organizations have developed welcome cycles, in which individuals receive a differentiated pattern of communication until the second or third gift is secured. Only then does the organization regard them as donors and enter them into the “standard” communications program. Organizations that have experimented with welcome cycles in the context of direct mail have found that they work best when they comprise a series of the best-performing “cold” recruitment packs that the organization has been able to produce.

Interesting work from the field of psychology has also identified that it may be appropriate to ask for different sums at different points in the relationship.²⁵ It appears that asking for too much initially can lead people to conclude that they have done their bit and ignore subsequent solicitations. It may be better to begin with requests for smaller sums and then build these up over time.²⁶ This is echoed in modern fundraising practice, where many U.K. charities, for example, solicit gifts of as little as six dollars per month and then work on developing the amounts over time. Such an approach works well, since a low-value ask eliminates many potential barriers to giving. When donors cannot post-rationalize their giving as a response to social or other pressures, they are significantly more likely to attribute their first donation to caring about the cause, and hence to continue their support.

Turning to the topic of post-gift communications, the issue of labeling has received the most research attention. The idea behind labeling is simple. If people can be induced to believe something new about themselves, then they may start behaving on the basis of that belief. In thanking donors for their gifts, organizations often append labels to the donor such as “kind,” “generous,” “helpful.” Such labels elicit a greater motivation to help, and foster favorable attitudes on the part of the donor. The impact of labels will be particularly potent when there are concrete prior behaviors to be labeled and when the label stresses the uniqueness of the donor’s behavior.²⁷ Repetitive labeling has been found to enhance efficacy,²⁸ and labels have been found to work best where the donor accepts the label,²⁹ emphasizing the need for the label to be credible and supplied by a credible source.

The fundraising literature is also replete with references to the need for adequate donor recognition. Failure to provide adequate and appropriate recognition, it has been argued, will lead either to a lowering of future support or its complete

termination. There is considerable empirical support for this proposition, indicating a link between the perception of adequate recognition and the level of gifts/lifetime value.³⁰ Where gifts are offered as part of the recognition process, they will be more effectual when the gift is clearly tied to the organization and its services. Generic gifts, obtainable from other nonprofits (or even for-profits), are significantly less effective in stimulating loyalty.

Value Determinants

Value determinants are components of the product or service that are considered to be critical from the customer’s perspective, and where a poor evaluation of performance would lead to switching. We have already examined the issue of the service quality delivered to donors; here we are concerned with the utility that derives from the gift and the dimensions of the product or service itself that delivers utility.

Utility in the context of giving can take many forms. Two forms of utility are relevant here: personal, which may be further subdivided into tangible and emotional; and delivered (i.e., an evaluation of the impact a gift will have on the beneficiary group). Beginning with the former, it has long been argued that utility could take “material” form, and under this view donors will select charities to support on the basis of whether they have benefited from those charities in the past or believe that they will in the future. Individuals could, for example, give to those organizations that will do them political good and/or serve to enhance their career—perhaps through the networking opportunities that will be accorded. Donors may also evaluate potential recipient organizations against the extent to which their support will be visible or noticeable by others within their social group, thereby enhancing the donor’s standing therein. Equally, in the membership context, members will evaluate the package of benefits received against the costs of renewal, stressing the need for ongoing research on the part of such organizations to ensure that the optimum “value for money” is maintained.

The prestige-based model suggests that utility arises from having the amount of a donation made publicly known.³¹ Being seen to give may enhance a donor’s social status or serve as a sign of wealth or reliability. A donor may wish to access a particular group, and thus desire to be defined by his or her philanthropic activity. Prestige is clearly about recognition and is therefore also relevant to the notion of feedback referred to earlier. To respond to the motive of prestige, charities can create gift categories and then publicly disclose donors who contribute to various categories. This type of motivation is typically more relevant to certain

categories of nonprofits, such as educational and cultural organizations rather than national charities. It may also be more relevant when addressing younger givers, since for older adults esteem-enhancement motivations are negatively related to gift giving.³²

It is now widely accepted, however, that utility can also derive from the emotions evoked by giving. Indeed, there is a well-established positive relationship between the degree of emotional utility afforded and gift-giving behavior. Emotional utility can take the form of a feel-good factor, or “warm glow,” or it may derive from a family connection to the gift, such as the loss of a loved one to a particular condition or disease. Unsurprisingly, donors touched by a cause in this latter respect exhibit a high degree of loyalty.

Extant research also suggests that utility derives from the impact achieved with the beneficiary group. Individuals will also evaluate potential recipient organizations on the basis of the extent to which their performance is viewed as acceptable. Both efficiency and effectiveness are at issue. With respect to efficiency, donors appear to have a clear idea of what represents an acceptable percentage of income that may be applied to both administration and fundraising costs. They expect that the ratio between administration and fundraising costs and so-called charitable expenditure would be 20:80. It is interesting to note that, despite this expectation, most donors believe that the actual ratio is closer to 50:50. For example, recent research shows that respondents perceived that only 46 percent of the focal charities’ expenditures reached beneficiaries, when in reality the average figure was 82 percent.³³ It has also been established that 60 percent was a significant threshold, with charities spending at least 60 percent of their donations on charitable programs achieving significantly higher levels of donation.³⁴

With respect to effectiveness, the degree to which the organization is seen to achieve its stated goals impacts gift-making decisions, the total amount donated, and the lifetime value of individual donors. This is a view supported by a later study that found that perceived mismanagement by charity administrators and trustees can impact negatively on donations, although it remains unclear how donors actually draw such conclusions.³⁵ It has been shown that, to help individuals rate charity performance more accurately, charitable organizations simply need to provide relevant information in the public domain (for example, the number of people aided, the quality of outcomes achieved, etc.). Individuals appear to form holistic views about an organization’s performance based on small pieces of relevant information. Providing a more complete picture appears unnecessary with most classes of donors.³⁶

Conclusion

Overall, a brief review of the literature suggests a number of actions that nonprofits might take to improve donor loyalty:

1. They should begin by developing an understanding of the economics of loyalty, and thus identify for themselves the difference in the lifetime value of the fundraising database that would be garnered by achieving small improvements in the level of donor loyalty achieved (1 percent, 2 percent, 5 percent, etc.). This is essential if staff and board members are to understand the rationale for an enhanced focus on loyalty, and “buy in” to the process necessary for this to become a reality.
2. Perceptions of the quality of service offered to donors are the single biggest driver of loyalty in the fundraising context. Organizations should therefore take steps to measure the quality of service provided by their organization and improve on those areas where weakness is detected.
3. Organizations should think through and, ideally, conduct their own primary research program to understand why donors support their organization, or, more specifically, from which aspects of the organization’s operations (or fundraising) individuals derive the most value. Value can then be engineered that directly reflects and satisfies donor motives for supporting the organization.
4. Allied to the above, nonprofits should consider how and under what circumstances they might contribute to a donor’s sense of self-identity. Are there circumstances where a donor would be likely to start defining him- or herself, at least in part, through his or her support of the organization? Donors may, for example, derive value because they identify with aspects of an organization’s brand or personality. These aspects may then be emphasized in communications.
5. Allied to the above, organizations should give greater thought to the labels they append to donors in their thank-yous and other communications. Donors can be persuaded to adopt an identity if it is fostered consistently over time and reinforced with credible messages from a credible source.
6. Nonprofits can seek to build donor commitment to their cause by considering each of the determinants we alluded to earlier. They can:
 - Clearly articulate their organization’s values.
 - Make clear to donors the difference their support is or has been making and therefore the consequences to the beneficiary if they were to withdraw.
 - Consider the “journeys” that they will take supporters on through ongoing communications. This might be as

simple as considering what “a year in the life” of each category of supporter might look like, or it may be more sophisticated, looking at how each segment of donors will be educated about the cause (and bought closer to it) over time.

- Allied to the above, consider ways in which donors can be actively encouraged to interact with the organization. In the electronic environment, for example, this is relatively easy. Supporters can be asked to sign up for specific forms of communication, to offer recommendations or suggestions, to take part in research, to “ask the expert,” to campaign on behalf of the organization, to “test” their knowledge in a quiz, etc. The more two-way interactions that are engendered, the higher the level of loyalty achieved will be.
7. Similarly, organizations should seek to foster trust by considering all of the antecedents alluded to earlier. An organization can:
 - Demonstrate to the donor that it has exhibited good judgment in its dealings with beneficiaries, its stewarding of organizational resources, and, where applicable, its approach to campaigning.
 - Stress that it adheres to appropriate standards of professional conduct. Ensure that all outward-facing members of staff receive appropriate training in customer service.
 - Design and instigate a complaints procedure so that individuals who wish to can take issue with the quality of an organization’s fundraising or approach.
 - Communicate the achievements of the organization and, where possible, relate these to the contributions made by individuals or segments of supporters.
 - Ensure that all promises made to donors are adhered to and, critically, *seen* to be adhered to.
 8. Consider the development of regular or “sustained” giving programs. Levels of attrition are much lower than those achieved in traditional annual giving. Younger donors are also significantly more comfortable with regular giving than their older counterparts, so offering regular giving, particularly as an online option, will greatly reduce the level of attrition experienced.
 9. Evaluate the continuation of activities that lower loyalty, such as list swap programs. Managers need to assess the impact on donor lifetime value rather than looking at the short-term attractiveness (i.e., return on investment) of such programs.
 10. Consider the creation of donor welcome cycles. E-mail and mail versions of these cycles should be considered.

Newly acquired donors should be exposed to a differentiated standard of care while their relationship with a nonprofit develops. The historically strongest recruitment messages would likely be the most effectual components of such cycles.

11. Finally, those organizations seeking to facilitate higher levels of loyalty would be advised to maintain regular contact with their donors, researching ongoing needs and preferences. As a consequence of this research database, segmentation can then be regularly reviewed and updated as necessary. It would also be helpful to conduct regular exit polling of lapsed supporters to identify the reasons that predominate for this behavior. Corrective action can then be taken where possible.

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This paper was based in part on a review of the retention literature commissioned by the Association of Fundraising Professionals. Their generosity in sponsoring this work is gratefully acknowledged.

Attention Philanthropy: The Good, the Bad, and the Strategy

by Chao Guo and Gregory D. Saxton

“**M**AY YOU LIVE IN INTERESTING TIMES.” THIS PURPORTED Chinese curse captures the nature of the information environment in which nonprofit organizations find themselves. The worldwide proliferation of information and communication technologies has ushered in a new age characterized by a twenty-four-hour news cycle, powerful Internet search engines, and near-countless social media outlets. Most nonprofit organizations make an appearance on social media and have websites that show all their good work, and people are not limited to the organization as their primary information source: they can obtain information through multiple venues—from voluntary web-based transparency and disclosure by the organizations themselves to intermediaries such as GuideStar, rating agencies such as Charity Navigator, and decentralized “word of mouse.”

Yet, this abundance of information comes with a price. As Nobel laureate Herbert Simon noted some forty years ago,

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“[T]he wealth of information means a dearth of something else: a scarcity of [. . .] the attention of its recipients.”¹ Due to people’s limited information-processing capacity, their attention to any particular cause or organization is necessarily diluted. As a result, they often fail to notice organizations or causes that are not constantly in their faces in a flashy way.

The challenges are particularly salient when nonprofits begin embracing social networking technologies. In addition to print media, radio, and television, a typical organization now has a website, uses e-mail, and avails itself of Twitter, Facebook, YouTube, Pinterest, and such custom-made mobile applications as Check-in for Good, Donate a Photo, I Can Go Without, and YMCA Finder, among many others. Recent research shows that the great majority of large and medium-sized nonprofits are using these information channels.² The problem is, if everyone is doing social networking, who is paying attention to your nonprofit? There seems no first-mover advantage to adopting these technologies, and just the mere fact of having a Facebook profile is not enough to make your organization unique.

In this altered informational landscape, attention has become a scarce organizational resource. Philanthropy and charity work are increasingly driven by attention, a commodity that nonprofit organizations must acquire in order to

attract—and sustain—their donors, volunteers, and supporters. Welcome to the age of attention philanthropy.

What Is Attention Philanthropy?

We define attention philanthropy as the *challenges, opportunities, and responses associated with the phenomenon in which all players in the philanthropic and charitable sector (for example, donors, funders, supporters, nonprofits, and so on) are potentially overwhelmed by information overload and a dearth of attention.* What is behind this phenomenon? The surge in computerization and digitization over the past three decades has led to a sharp increase in the number of information channels, as noted above. The decentralized and participatory aspects of digital media have also led to an explosion in the number of information producers, intermediaries, and third-party providers. Almost anyone can be an online journalist, blogger, or nonprofit analyst. The increase in information producers and channels has in turn led to an explosion in the amount of available information. In short, the information environment of nonprofit organizations has changed. It is markedly richer yet more difficult to navigate. With so much to look at but a limited information-processing capacity, there is an “attention deficit” problem: donors and supporters can have difficulty knowing where to direct their attention, and organizations can have difficulty grabbing and holding that attention.

This attention deficit problem possesses at least three characteristics that have possible broad implications for nonprofit organizations. First, people’s attention is fleeting. Today, they are reading about the infamous terrorist group Boko Haram kidnapping hundreds of Nigerian girls; tomorrow, a massive earthquake in Latin America holds their attention. Thus, whatever attention the public gives an organization is unsustainable: people notice an organization, like it (or hate it, in some cases), and then forget about it.

Second, people are drawn to drama. Donors and supporters are more likely to notice dramatic stories and spectacular events, such as natural disasters and crises. While these catastrophes certainly deserve attention, they tend to divert support from smaller yet still important local causes. Attention philanthropy seems to exacerbate the issue. This tendency is consistent with and related to the observation that nonprofits often rely on anecdotal, personalized stories and narratives to describe their function rather than highlighting organizational qualities like careful program design and systematic evaluation.

Finally, people crave the new. They are more likely to pay attention to new programs, projects, and activities than to old ones.

The scarcity of attention has thus initiated changes in philanthropic practices that present notable opportunities and challenges for nonprofit organizations. Below we outline the positive and negative aspects of these implications before turning to potential organizational strategies for thriving in this new information environment.

The Good

Attention philanthropy presents opportunities for nonprofit leaders to experiment with new ways of reaching their target audiences. Attention, if properly managed, can be a powerful marketing tool for nonprofit organizations. For example, TOMS Shoes, a company with a charitable mission (“With every pair you purchase, TOMS will give a new pair of shoes to a child in need”), has developed a grassroots marketing approach that entails a series of attention-grabbing events, such as the “One Day Without Shoes” campaign, instead of relying on formal channels of advertising. Its clever, attention-getting strategies have attracted numerous people to the company’s “One for One” message and helped establish a wide network of supporters crucial to the company’s business and philanthropic success. Since TOMS launched in 2006, it has given over ten million pairs of shoes to children in more than sixty countries.

Sometimes, the amount of public attention an organization attracts is not even the result of its deliberate strategy. One such example is a Facebook campaign by supporters of the Susan G. Komen foundation. In October 2010, a viral Facebook posting of unknown origin encouraged women to say where they like to leave their purses when they come home. The provocative statements—“I like it on the floor” and “I like it on the kitchen counter”—got people talking. The “I like it on . . .” meme—like the “bra color” status updates that swept Facebook a little earlier—was intended to bring attention to Breast Cancer Awareness Month (October). The tactic apparently funneled 140,000 new fans to the official Susan G. Komen Facebook page that year. Komen did not take credit for the phenomenon, but it certainly enjoyed the free publicity. “We think it’s terrific,” a spokeswoman for Komen commented. “It’s a terrific example of how little things get started on the Internet and go a long way to raise cancer awareness.”³

More broadly, attention philanthropy potentially yields several positive developments for the nonprofit sector. For instance, it provides a more level playing field, and allows for a more decentralized, bottom-up participatory approach to solving social problems. Gaining attention relies as much on creativity, innovation, and entrepreneurship as it does on financial resources. And, as seen in the above examples, the

size and resourcefulness of an organization's wider constituent network play a key role in the success of a fundraising or public education campaign. A greater emphasis on the public's attention may also benefit the vitality of the nonprofit sector by concentrating its focus on external constituents.

The Bad

Yet, attention can cut both ways. In the case of Susan G. Komen, good publicity quickly turned bad when, in January 2012, the nation's leading breast cancer charity "quietly" decided to cut funding to Planned Parenthood, the nation's leading provider of health services to women. When Planned Parenthood not so quietly announced the news on its Facebook page, shocked and outraged people lavished their support on Planned Parenthood—not just in the form of Facebook "likes" and Twitter followers but also in donations; at the same time, they expressed damning criticism of Komen through social media. The negative attention led to heavy public scrutiny of Komen's programs and finances—and, as it turned out, Komen was not as much "for the cure" as its name suggests: it was found that, in 2011, the "pink ribbon" organization spent 15 percent of its donations on research awards and grants, down from 29 percent in 2008; in contrast, 43 percent of donations were spent on education, and 18 percent on fundraising and administration.

In addition, as mentioned earlier, public attention tends to latch onto the flashier organizations, programs, projects, and activities. For instance, research shows that in crowdfunding appeals, certain types of organizations (for example, environmental and health organizations) were more likely to attract money than others (for example, organizations for the homeless).⁴ Evidence shows, too, that nonprofits make crowdfunding appeals largely for new, tangible projects (buying a new building, making a film, and so on), and that none make crowdfunding appeals for such mundane projects as program evaluation or human resources training. Such prosaic yet essential goals simply do not grab attention. Energy more easily swings toward marketing, public relations, stakeholder relations, and capital projects. Within each organization, in turn, efforts tend to shift to those programs that are more attention grabbing. It's the same for certain projects; for example, building a new clubhouse receives more attention than refurbishing an existing one.

Perhaps more importantly, an organization can become lost when it obsesses over getting attention at the expense of its mission, as the Greg Mortenson controversy illustrates. Mortenson, cofounder and executive director of the nonprofit Central Asia Institute (CAI), used his best-selling books *Three Cups of Tea* and *Stones into Schools* to promote the

CAI cause. In them, he recounts the story of the founding of his nonprofit, and tells of the struggles CAI faced while fulfilling its mission of providing education to girls in remote areas of Pakistan and Afghanistan. The books brought Mortenson a large fan base and extensive media attention. Until a few years ago, his constant presence had ensured a steady flow of donations to CAI that enabled him to vastly increase the size and scope of its operations. In 2012, however, Mortenson came under heavy scrutiny for alleged inaccuracies in his books, gaps in accounting, and possible exaggeration of the number of schools his organization had built. Unfortunately for Mortenson, regardless of whether or not these allegations are true, the controversy has seriously damaged his reputation and challenged the legitimacy of his organization.

Finally, sometimes an organization can suffer from negative secondhand attention due to its affiliation with someone who is in the spotlight. Take the Livestrong Foundation (formerly known as the Lance Armstrong Foundation) as an example. Established by the world-famous cyclist Lance Armstrong, in 1997, to help cancer survivors and their families, the success of the foundation had been closely associated with its founder, president, and single largest donor. Because of Armstrong's celebrity status, the foundation was able to garner tremendous attention and support from donors, corporate sponsors, and the public. This secondhand attention backfired, however, when Armstrong appeared on the *Oprah Winfrey* show in January 2013 and admitted to having used banned substances to improve his cycling performance.

The Strategy

What is an organization to do in these interesting times? A first step is to recognize that attention is an informational, communicative, message-based phenomenon that implies a series of *sender* → *receiver* relationships, with the organization being the sender and the public the receiver. As a result, organizational leaders need to become comfortable with designing appropriate messages and targeting relevant audiences.

Organizations should recognize that certain types of messages are more likely to receive attention than others. Here we present several insights from nonprofits' use of social media that provide an excellent context in which to see the immediate audience reaction to organizational messages. Not only are the insights valuable, given the ever-increasing use of social media tools, but they can also be generalized to other communication channels, such as websites and traditional media.

Our research suggests that, on Twitter, targeted messages (those seeking to connect to other users), messages including images, and messages tapping into preexisting networks

through the use of hashtags are more likely to receive audience reaction. Just as importantly, those organizations that communicate frequently and those with larger audiences are more likely to receive attention.⁵ This observation makes intuitive sense. You need an audience that not only reads your messages, “friends” you on Facebook, and/or follows you on Twitter but also makes donations or signs up to volunteer; if you can make it “captive,” you will be more successful in the long run. Yet how do you build a captive audience? You need to build a network and communicate with it.

So how can an organization build and leverage a captive audience that is actionable? Our research suggests that the best framework for building an online network is a three-stage pyramid model of social media-based strategy: *reaching out to people, keeping the flame alive, and stepping up to action*.⁶

The first stage, *reaching out*, involves making new connections and getting the word out through the continuous sending of brief messages to followers. These tweets are largely informational, and the focus is on getting attention. One interesting practice on Twitter is what might be called “celebrity poking” or “fishing,” as in the following attempt by Public Counsel (@PublicCounsel) to target Oprah Winfrey:

@oprah in tribute video to Elie Wiesel: “you survived horror without hating”

Celebrities have tremendous network powers, in the sense that their tweets almost immediately reach audiences of hundreds of thousands—even millions—of followers. If a nonprofit can capture the attention of a celebrity, the payoff, in terms of geometrically increasing the diffusion of an organizational message or call to action, is enticing.

The second stage, *keeping the flame alive*, involves deepening and building emergent ties. The focus is on preserving attention: enhancing and sustaining communities of interest and networks of supporters. The two types of community-building tweets are *dialogue* and *community building*. First, there are tweets that spark direct interactive conversations between organizations and their public. An example is the following tweet from ChildFund International (@ChildFund):

Change a childhood #childfundcac event starts now. Give us your best tweets on child rights. Rules @ <http://www.childfund.org/twitter>

Second, there are those tweets whose primary purpose is to say something that strengthens ties to specific users (via @user mentions) and discussions (via hashtags) in the online community without involving an expectation of interactive

conversation. The following message from Make The Road New York (@MaketheRoadNY) offers a good example of this type of community-building tweet:

Great work everybody! MT @LICivicEngage Tks for pledging to reg. voters this year! @naacp_ldf, #local1102, @32bj_seiu, #liia, #carecen

The third stage, *stepping up to action*, involves mobilizing supporters. The focus is on turning attention into action. Tools such as hyperlinks and hashtags are frequently used in conjunction with mobilizing messages. For instance, the following call-to-action tweet from the National Council of La Raza (@NCLR), a large U.S. Latino civil rights and advocacy organization, contains two hashtags:

Today we are storming the Supreme Court to highlight the injustice of #SB1070. Join us and demand #Justice4AZ

You can employ similar messages to mobilize constituents to donate, volunteer, attend an event, or indeed do anything that will help the organization meet its mission.

Of course, these examples represent just one model for how an organization can approach its audience. The key takeaways from the model are: (1) audience precedes attention, as attention is unlikely to grow if there is no audience; (2) audience needs nurturing; and (3) by all means seek to attract attention, but know that it is a means and not the end. Keep your mission in sight and leverage attention to produce more-substantive outcomes.

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The age of attention philanthropy presents opportunities as well as challenges for nonprofit leaders, who must be vigilant in innovating new ways to reach their target audiences if they hope to gain support for their organizations. Yet, when they focus too much on gaining the public’s attention, they risk losing sight of mission and accountability. They must clearly situate their quest for attention within the organization’s mission and strategy. Attention is in many ways a new form of currency for nonprofit organizations. And, just as you would not want to chase dollars with harmful strings attached, be sure not to chase attention at any cost.

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The Dance of the Four Veils

by Tom Ahern

Editors' note: *The following was excerpted from Seeing through a Donor's Eyes: How to Make a Persuasive Case for Everything from Your Annual Drive to Your Planned Giving Program to Your Capital Campaign (Emerson & Church Publishers, 2009).*

FOR THE MOST PART, NONPROFIT COMMUNICATIONS ARE BORING. Not on purpose, mind you. Still, they are almost always uninteresting. Why? Because they swaddle themselves in one or more of the following interest-draining veils.

Veil Number One: Avoiding Conflict at All Costs

Ditto for controversy, uncomfortable truths, and subjects or language that might upset people.

Conflict and controversy are the essence of drama. Drama automatically engages and intrigues us, because our brains are wired to respond to such stimuli. Drama moves people. Drama overcomes indifference and inertia, which are your real enemies when you're trying to communicate, and particularly when you're trying to fundraise.

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An absence of drama leaves readers bored, cold, unmoved, and indifferent.

Does your mission naturally lack drama? Doubtful. Many charitable missions are in some way a solution to a serious problem: teenagers in trouble, a disappearing natural habitat, disease, ignorance, chronic poverty. Problems like these are inherently dramatic.

Bear in mind too that your solution to such problems is what makes your organization relevant to donors, prospects, the media, and others. If you climb aboard the Happy Talk Express and avoid drama at all costs, your communications ring false, and your organization seems less relevant.

Veil Number Two: A Tendency toward Weak, Bland Language Rather Than Bold, Vivid Words

Consider headline verbs, for example.

Here's a collection of verbs plucked from headlines in the *Wall Street Journal*: *mauls*, *devours*, *looms*, *sparks*, *threatens*, *embraces*, *sputters*, *sows*, *surges*, *rejects*, *retools*, and so on. What characterizes these verbs? Vigor, sound, fury, sharp

action. In sum: these verbs have impact.

Newspaper editors have a saying: The verb is the story. Surges? The trend is up. Collapses? The trend is down. Verbs are fireworks, motion, attitude.

In contrast, here are verbs that I scoured from headlines in nonprofit newsletters: *establishes, lists, uses, unites, reaches, gives back, plans, unifies, builds, sets, visits, shares, administers, awards, helps, benefits*.

What characterizes these verbs? They are inconclusive (*shares*), weak (*administers*), unnecessarily lofty (*unifies*), and flat (*visits*, as in “visits an issue”). In sum: no impact.

Veil Number Three: Faint Appreciation for the Emotional Basis of Human Response

Instead of fear, anger, hope, and salvation, we are served extra helpings of pontification.

As noted earlier, with modern MRI diagnostics, we can now watch the brain fire as it makes a decision. It fires first in the emotional seat, then the impulse routes to the rational seat. Imagine the rational part of your brain as a flunky armed with a rubber stamp that says in formidable letters, “APPROVED.” The emotions decide what to do. The rational part of your brain seconds the decision: approved.

The old thinking held that emotions and reasoning were opposites. They struggled for dominance. The well-informed thinking now knows that emotions initiate the decision, and the reasoning area of your brain struggles to keep up with a “Yes, dear.”

Veil Number Four: Relying on Jargon

Allowing jargon into your case is a faux pas. It’s a mildly disgusting habit, something you don’t do in front of guests, like flossing at the dinner table.

Here’s a United Way communication explaining itself: “Our awareness and efforts now focus on community-impact goals, and how we feed into that. *In other words*, our work has become driven more by mission than by function. We need the multipronged approach to move public will, and there has been an exponential benefit of working more closely and in concert [emphasis added by author].”

In other words? This writer needs help. Real “other words” would have said something obvious like, “We’ve changed the way we do things. We hope to get better results this way. Our first attempt was a big success.”

Jargon is not public language. It’s for specialists only. Words like *interdisciplinary*, which bring to mind all sorts of positive connotations among educators, do not resonate the same way for the average person.

And the average person—who isn’t a specialist—is your

target audience. When the University of Toronto raised a billion dollars recently, 112,819 people made gifts. It’s safe to assume that few contributors were specialists conversant with academic jargon.

Return to the example of nonconversational writing that opened this chapter. The full text reads as follows:

XYZ University’s strategic plan is designed to amplify the university’s academic excellence. The result of a 13-month planning effort, the plan identifies strategies to enhance the university’s work for students on three fronts:

- Reinterpreting the liberal-arts skills of communication and critical thinking to take into account 21st-century challenges and opportunities
- Multiplying connections between students and faculty members by building on the faculty’s record of original research and creativity
- Building on XYZ University’s strong sense of community, locally and globally.

What’s wrong with this kind of writing? At least three things: (1) it’s freighted with jargon, the kind of bureaucrat-ese that only insiders understand; (2) it mentions no emotional goals; and (3) the donor is nowhere in sight. Here’s a rewrite that covers the same ground but eliminates these flaws:

“If all goes according to plan, within a decade XYZ University will emerge as the top school in its class, leaving behind our ‘peer schools’ of today. Admittedly, the plan is ambitious. And it won’t be cheap: excellence in education at this level never is. But we will get there, thanks to your vision, commitment, and help.”

There’s no jargon. The donor is given all the credit in the last sentence. And what are the “emotional goals” (i.e., goals that touch the heart of the target audience)? There are several: emerging as the top school in its class, leaving behind its peer schools, and pursuing an ambitious (rather than an ordinary) plan. These are all things alumni understand, appreciate, and want. How do I know? I’ve asked.

Final word goes to the brothers Heath from their business bestseller *Made to Stick*:

“Concrete language helps people, especially novices, understand new concepts. Abstraction is the luxury of the expert.”

So what does *concrete* mean? “If you can examine something with your senses, it’s concrete. A V8 engine is concrete, whereas the term *high-performance* is abstract. Most of the time, concreteness boils down to specific people doing specific things.”

5 How to Advance an Issue through Communications

Disrupting the Dominant Frame: An Interview with Susan Nall Bales of the FrameWorks Institute, 2015 MACEI Award Winner

Editors' note: On February 4, it was announced that the FrameWorks Institute had been named a recipient of the 2015 MacArthur Award for Creative and Effective Institutions. Each year, the MACEI award is granted to help a number of exemplary nonprofit institutions continue "creative work" of exceptional value to society. Along with the FrameWorks Institute, the other grant recipients include: ASILEGAL (Asistencia Legal por los Derechos Humanos), in Mexico City, Mexico; Firelight, in New York City; Forest Trends, in Washington, D.C.; the Human Rights Center, at UC Berkeley School of Law; iCivics, in Washington, D.C.; the National Institute on Money in State Politics, in Helena, Montana; and the Roosevelt Institute Campus Network, in New York City.

FrameWorks was founded in 1999 by Susan Nall Bales. The core of its work is on how advocacy communications can be improved through the use of Strategic Frame Analysis. Bales is a veteran communications strategist and issues campaigner with more than thirty years of experience researching, designing, and implementing campaigns on high-profile social issues. The \$1 million award came at a pivotal time for FrameWorks, as the organization was preparing to expand access to its groundbreaking and incredibly useful work.

Susan Nall Bales: FrameWorks' mission for fifteen years has been to deliver the quality research that nonprofit organizations need to effectively address social issues. Our mission has two parts: The first is to actually do the research that is necessary to inform public engagement about an issue, and the second is to teach nonprofits how to use that research.

NPQ: How important is the way that you frame an issue?

SNB: I've argued for twenty years that communications for nonprofits should be a front-end activity. It's not about

dissemination. It's about understanding the ways that people perceive your issue, and this needs to be part and parcel of your work on an issue right from the beginning.

You have two sides of a coin. You have the actual social analysis of what the problem is and what would improve conditions, but you also have the way that people perceive that problem and what they perceive the solutions to be—and those things are joined at the hip. FrameWorks tries to understand the social analysis the experts want to put forward and then tries to figure out what are the impediments in people's minds that prevent them from engaging with the issue, understanding it, and wanting to resolve it.

NPQ: You have talked before about the power of a dominant narrative and how that is one of the things that distracts people from even the best-supported arguments. Can you talk a little bit about what people doing social justice work might be battling as they go about trying to persuade people that there are other ways to look at issues that they face?

SNB: To start with, I think that the nonprofit sector has made enormous progress in bringing social science into the way that it thinks about social problems. We do better social analysis, we look at evidence with much greater scrutiny, and we weigh policy options, I think, with much more rigor. But communications as a social science has not enjoyed that same progress, and so I think that what we have is a black hole in our strategic toolkit that prevents us from seeing what communications is good for and how to use it. Unfortunately, the consequence of that is that we are losing battles unnecessarily. I don't mind losing, but I really, *really* don't like to lose when we don't have to.

NPQ: Can you talk about some of the issues specifically that you think continue to revert to form, despite evidence to the contrary?

SNB: Well, I think many issues do. I mean, it's just part of the way we think. We know from the work of people like Daniel Kahneman and from others who study how we think that unless our automatic thinking is disrupted—unless it doesn't prove helpful in making our ordinary day go well—we are going to default to these dominant ways of thinking . . . these folk models of how the world works. And you can't just steer them with a little slogan or a tagline, which I would say continues to be the way that we in the nonprofit sector think about communication. You have to disrupt the dominant frame and replace it with a better model of how the world works.

NPQ: Can you give an example of that in your recent work?

SNB: One example would be our work on education where, over time, ten foundations came to us and wanted to work on a new education story. But all of them had very different parts that they were funding. You know, some were in after-school programs, some were in assessment, some were in equity. I think one of the innovations that FrameWorks has brought forward is to bring those people together around a core story. It isn't just one little piece of the elephant that you're trying to put your hand on but a new story about how education works—what it is, what it's good for, what derails its outcomes, and what would improve it.

We worked with those ten foundations and created a new story. It has a plot. It has the equivalent of "it was a dark and stormy night." It sets the stage. It has characters. It has mechanisms that are operative in the universe. It has bad guys in the narrative. It follows a narrative outline, but it isn't the old story: One kid, highly motivated by a caring teacher, pulls himself up by his bootstraps and becomes Bill Gates. That is the narrative we tend to tell ourselves. Tinkering around with that narrative is not going to get you anywhere, but substituting a different story—and, we would say, an empirically tested story—can be demonstrated to get people to a different place, where they appreciate that the system needs to be changed if you want better outcomes for most kids.

NPQ: What would be the replacement story for that basic "bootstraps" narrative that is deeply embedded in everybody's psyche in this country, and even in the psyches of people who come to this country from elsewhere? What do you try to replace that with?

SNB: The first thing I would say is that we have new tools up on our website that explain this. We provide a message memo and toolkit for explaining the new story. But basically, re the bootstraps example, what the new story does is make clear why education is a public good that society needs in order to move forward. The distinction is between education as a public good and education as an individual product that one acquires as a consumer. It sounds very simple when you think about it, but that assertion of publicness is almost invisible in media coverage of education and, to some extent, in nonprofit groups' own messaging.

NPQ: We've talked before about the idea of needing to repeat the new story and stick to it over time. Can you talk a little bit about that as a function of communication, and how important it is and how it occurs?

SNB: What's really important is telling a complete story over time and using that story—that same story—to explain multiple policy objectives. What we are doing wrong is thinking we have to have a different story for every policy "ask." What a core story does is to create a way of understanding how an issue works that would then allow you to see why multiple policy prescriptions would address that reality. There isn't enough time or money in the world to advance every policy "ask" with a new story, nor could people absorb that. So I think that's a fundamental mistake that we are making.

NPQ: I often encounter people working on the same issue

but portraying that issue in many different ways, and there's a different assumption base behind each of the ways that it's portrayed.

SNB: Yes. And I would say that there's a corollary to this, which is that we think that we're branding, not framing. And so we think, for instance, that it's child care versus children's oral health. Well, that's ridiculous. If you understood what children needed, you would be able to see why quality child care is important *and* why a child needs access to regular dental care, too. You want to move toward the story that lifts all boats instead of thinking that nonprofit issues are like Coke and Pepsi, and if mine moves forward, yours has to fail. That's a bad conceptual orientation.

NPQ: Going back a bit, when you talk about empirically testing communications, what does that entail?

SNB: Here is where I really feel that we have not made the progress that we should as a sector. First, communications is seen as an art, not a science, and if it's an art then my idea of how to engage people is just as good as yours. If it's a science, then when you have your opinion I should be able to say, "Prove to me that that's going to work for me." So, FrameWorks is definitely in the empirical camp.

In the science camp, we think the artistry comes once you start to know what the message is. Then you want creative people to be able to implement that, to execute it in multiple ways. But right now what you've got is that all research is considered equal. One person's two focus groups are the same as another group's serious experimental survey. And the lack of rigor in that work and in our reflection on that work is killing us. So I think that as a sector we need to step back and look at how we view communications as an integral part of policy advocacy and what level of rigor we require in the execution of communications research.

NPQ: It really is a huge idea, and in some ways revolutionary for the sector. But it adheres in some ways to some of the trends, which are to look at research (at least to inform what you're doing) and to depend a little bit more on data to help you design the way you're going to go about doing something. I see people use communications in this way in their fundraising, but they do not necessarily bother to do that in their advocacy.

SNB: Yes, we're often called in to talk to people's direct-mail consultants. The direct-mail formula is directly counter to what social scientists say should be an issue narrative. So, they're

writing things like "send money or this *x* will die." It doesn't matter whether it's manatees or child abuse victims. We've actually worked with some direct-mail folks and said, "You know, a better story would be one that explains the underlying mechanism." So, why are critters in the oceans being pushed closer to the coastlines, where they're being unintentionally caught (and so, in other words, become more vulnerable), and what are some of the solutions that would prevent them from becoming bycatch?

So, there's an example, and the direct-mail people are so happy to have a different story. You know, they'll say to us, "Oh my God, I couldn't do that dead shark story one more time." And when you do that—when you change that direct-mail narrative—you're also educating your core constituency to be issue advocates. So, this notion that the people who give you money are different from the people who vote for your issues seems to me quite comical.

NPQ: So, you're saying that at every opportunity one has to drive that issue story home.

SNB: Yes, and wouldn't you want to figure out ways to bring your cash constituencies into your issue advocacy?

NPQ: Right.

SNB: I think we don't spend enough time on that; we simply assume that the old formulas are getting us where we want to go. I think that what FrameWorks has been about is questioning old formulas and then systematically undertaking research to find out whether they work or not.

NPQ: You're a watcher of social movements. I'm wondering if there are any examples of seizing a narrative in a frame that you've seen recently that have been impressive to you?

SNB: Let me say two things. There is a scholarship of social movement; again, it is often ignored. So, I don't think I would be overstating it to say that I am in meetings with people who profess to understand how social movements work and to be social movement builders whose advice is at odds with what we know about the theory and practice of social movements. So, again, I think we're losing unnecessarily because we're not really paying attention to a good literature—to a good *social sciences* literature.

I thought that the campaign in the U.K. to keep Scotland part of the United Kingdom was phenomenal. If you watched the whole first part of the campaign and heard Cameron's statements, they were all about, "Don't do this, you'll die,

you'll starve." And that just brought up all this Scottish resistance—from Braveheart onward: "We're Scots"; "We're used to this"; "We'll eat haggis." You know.

NPQ: Right.

SNB: Talk about playing into a default frame. I mean, the use of this punitive, scolding frame of enforced economic dependence was setting the stage for Scottish secession—as one observer said, the main message was "Do the maths and grow up." The referendum was even framed as the "No" campaign. I am told that some very smart communicators figured out this was not going well and changed the final weeks of that campaign to be about, "We need you! You are part of us. This would be a sundering of our mutual relationship." The "Better Together" campaign appealed to values of economic interdependence and longstanding cultural ties. Suddenly, the frame changed to "Don't leave us. Please stay." That was a really masterful wielding of the value of interdependence. Look at how close that was, and it didn't go the way that many people thought it would. I think it would have been far more problematic for Great Britain if that sea change in the framing had not occurred. I mean, I thought that was brilliant.

Certainly, the reframing that is closest to home is gay marriage, where we've seen a complete change in the way that is thought about. And, of course, the go-to place for a change is tobacco—which has evolved from being thought of as a personal vice to being thought of as a defective product—with many campaigners who very conscientiously made that frame change.

NPQ: When you have a very diverse field that is approaching an issue in multiple ways, and—I don't know why, I always think about the issue of poverty—how do you approach something that really has multiple, to use your word, *defective* frames being used around it? And how do you begin to overwhelm that noise to try to counter that?

SNB: That's a really good question. The way that we teach advocates and experts to think about what communications is good for is with the analogy of a swamp—that people aren't just blank receptacles; they have lots of things in them that they have pulled over time from their experiences (including their mediated experiences), from things they know, from their folk economics, etc. So you're wading into a swamp, and there are alligators in that swamp that are big dominant ideas that are going to eat your incoming information every time. And there are some orchids in the swamp—things that

people are trying to grow—but there's not a lot of nurturance to help them grow.

We diagram that swamp, and we say, "Here is this cluster of ideas. These ideas, if you step in them, they are going to pull you under. But here's another cluster of ideas." And then, as we do our prescriptive work—the metaphors, values, and other frame elements that we develop—our work is tested to overcome those parts of the swamp, so that now you have tools to help you navigate around those things and help you overcome them. This is where I think lots of people talk about "strategic communications." I don't think there's a lot of strategy in most communications. What we've tried to accomplish is a tool-to-task fit. You see the task, which is that you have to overcome a pattern of thinking; you have ways to avoid it, and you have tools that get you around it.

Here's an example. We know that people think a lot about fairness, and we know that advocates invoke fairness all the time. But fairness, in the American psyche, can mean "us versus them": "Somebody is getting something I'm not"; it can mean, "Somebody is not trying hard enough and so they're being given something." So, when you evoke fairness between individuals or fairness between groups, you're getting some of this swampy thinking that's not very helpful to you.

Over time, what FrameWorks has done is to experiment with a different kind of fairness, which is fairness across *places*—the idea that fairness is not being equally distributed, and that the distribution mechanism is faulty. Some kids in some parts of the city aren't getting the educational benefits that they need to thrive. And so the problem is not that one group should be giving their benefits to the other one; the problem is that the mechanism needs to be repaired so that fairness is being equally distributed. This has been a kind of "zip code message"—that where you're born, the part of town you're born in, shouldn't be your fate. That's a much more powerful way to overcome that swampy thinking and get people to see fairness.

NPQ: What do you think about the idea that there is a limited number of stories in the universe that we all know and glom onto? Is that in fact something we need to pay attention to—that the ways we craft our stories have to be familiar and clear enough that people can glom onto them?

SNB: That is a really good question. It is true that we know a limited number of stories and that those stories are greatly influenced by the cultures in which we live. The story that feels good to us is the story that we hear every day. We're attracted to these familiar stories, the contours of which we know so well. They are culturally specific—so in *this* culture

you would say that the triumphant individual who pulls himself up from his bootstraps is the way that individualism as a value is inculcated in us in our society. But I think what many scholars would say is that you can't tell people that those stories aren't true, because you just reinforce them. You just remind people of that story.

However, you *can* build new slots in that story. I'll use an example from Roger Schank, an artificial intelligence scholar, who said, "You can't tell people that Cinderella didn't have mice." Now, in your head, you've got Cinderella and mice, right? But what you could do is say, "Did you know that Cinderella had another stepsister?" So, you can take an empty slot in a story and build it out. You can take a narrative structure that has a setting, characters, a bad guy, and a good guy, and you can turn that into a story about systems, so that the bad guy is not teachers unions in the education story—which just torches all public engagement (whether you like them or not, that's the end of the discussion about education reform) . . . but you *can* make it that the charging stations that kids need in order to learn in this society are spotty for some kids. They're not there in every community, and they're not there with the regularity that we need, and so fixing those is what we need to turn our attention to. That's a story about fixing things, and Americans are very pragmatic and practical. So, there is a way to tell stories along one part of the cultural grain while not delivering back to people the same old unhelpful story.

If I have a hobbyhorse, I would say it is the way that people talk about resonance—as in, "Does the story resonate with your audience?" What resonates is going to be the dominant story, so what you want to do is figure out something that *breaks* that story, like the unknown stepsister, and move people to rethink the story and to come out with a different outcome. So, when I hear people saying, "It has to resonate," I think, "Oh my God, we're dead in the water." On kids' issues, for example, we're just going to be telling them that parents are responsible—and people think this because they don't have any other way of thinking about how kids operate.

I think one of the problems here is the lack of interdisciplinarity. People who are advocating for solutions to social problems—people who are scientists and social scientists who study those social problems—live in their own niches and are not routinely in contact with people who are communications scientists. Even the communications scientists are narrowly niched. If you look at anybody who's doing communications, if you're lucky they're following one academic discipline. They're psychologists, or they're linguists, or they're public health people.

What FrameWorks has done—and what I'm most proud of—is to create a transdisciplinary organization. We duke it

out over whether we are showing people that structures affect people's outcomes, whether their political science methods are better than anthropological methods for getting at a particular question. So, what FrameWorks has been is one large inquiry into how to get the best theories and the best methods aligned to give you answers to the practical questions that communicators need answers to. And I don't think anybody can do it through just one or two disciplines.

When I first started FrameWorks, I wondered why nobody else had done it before. It seemed to me a logical thing to do, and I was interested in an effort in the mid-'30s by the Rockefeller Foundation. They created The Communications Roundtable. This is really at the dawn of political psychology and understandings about propaganda, and we had this amazing array of the major social scientists in this country. I went up to Pocantico [Hills, New York], which is where the archives live, and I went through the box of minutes from those meetings.

The problem was that everyone fought each other from their disciplinary perspective. Then World War II broke out, and half of those people went into the Office of War Information. They used to pick up Margaret Mead and give her a ride into work so that they could pick her brain, because they needed some anthropological perspective! And then, after the war, they all went back to academic institutions and tried to create the same interdisciplinary conversations they had in the Office of War Information, and they were eaten alive by the academic institutions.

So, what we have done at FrameWorks is to try to create that kind of inquiry outside of the academy, recognizing that it wasn't likely to happen inside. In our little humble way—you know, we're roughly twenty people—we try to incentivize interdisciplinary study to reward people who get together and share their work: "See, we've taken *this* method and we've added *this* perspective to it, and when we apply this to immigration we're getting different answers." I don't think you can get good message recommendations without doing that.

NPQ: Do you think that process is counterintuitive for a lot of Americans? Many people's idea of communications is to stay on point, stay narrow, get from the beginning to the end.

SNB: There's actually a report on our website called "Don't Stay on Message." It's on the subject of immigration, supported by MacArthur. We tested whether actually staying on message when you're attacked is effective, or whether pivoting to a second message is better—and, if so, which one. What we were able to show is that if you stay on message, you

lose ground. If you pivot to a second message, you are able to counter your opposition. So, staying on message is not always the right thing to do—and this gets to that idea of a “poor story.” Instead of taking that hammer of communications and putting it on the same nail over and over and over again, you’re taking the hammer of communications to a whole set of nails that are configured like a story, and you know which one to hammer in response to which place in people’s minds they’re going to.

NPQ: This is the communications strategy of all of our dreams, and you’re one organization with twenty people. So, now what?

SNB: We have two directions we’re moving in that we think respond to that. The first is the FrameWorks Academy. A couple of years ago, with funding from MacArthur and the Kellogg Foundation, we began to invest in a state-of-the-art online course that would help people understand how metaphors work, how values work, how communications works, and what’s a good theory of change. We created a course called “Framing Fundamentals,” and it’s up on our website, available to people that may not actually ever come in contact with us otherwise. And we are creating another set of courses that build upon that, that take up issues, but they’re topical. So we’ve got one up on our site now that is on skills and learning education. There will be another one soon on immigration, and then one on human services.

You can subscribe to the courses and sit at your desk, and say, “I have no idea what these people are talking about with metaphor. I’m going to take this metaphor lesson, and then I’m going to look at what they’re saying about human services, about how to frame that.” We give you the ability to learn what *we* have learned over these years, in a very interactive way.

The second thing we’ve done has to do with feeling that we have to get ahead of the next generation of nonprofit leaders. I think we have to build their communications capacity in the places where they are learning how to think about their jobs. Additionally, we are beginning to partner with a number of academic institutions—the University of the South is one, and we expect the University of Alberta to be another—to help develop a curriculum that is used by people who are training up to become the next generation of nonprofit leaders. They’ll have some framing chops under their belts, to mix a metaphor, and they’ll understand—when they see a problem like a measles immunization backlash, for example—that four focus groups is probably not the way to attack the issue, and that you need to understand where

people *are*. You need a medical anthropologist or two to come in and help you understand how people are conceptualizing immunization and how best to begin to work with them to get them to see it in a different way.

When we see the political posturing around that particular issue, the thing that is tragic is that people have so little understanding of how immunizations work that they’re confused about whether the solutions that are being put forward are good or bad ones—and that’s when you have this perceptual problem. The whole public health approach to community interdependence is being questioned and, I think, is losing ground, because people do not have a vivid way of thinking about what that means.

NPQ: The MacArthur award comes, it seems, at a very good time for you, because it sounds like you’re able and ready to launch with a much more broadly available approach right now. Is that right?

SNB: I think that is exactly right. We’ve spent fifteen years experimenting and refining methods, and throwing things out and saying, “No, we don’t want to do it this way,” or, “We’re not going to pay attention to this scholarship because we don’t think it’s helpful,” or, “We’re going to pay attention to this,” or, “We’re going to bring that into our work.” I feel like we’re in a very good place. We still continue to experiment and innovate, but we have a strong theoretical base.

We feel confident that we have developed a tool in Strategic Frame Analysis that is useful, predictive, adaptable to multiple issues, and that can be brought forward to pretty much any type of policy issue that presents itself. Now, we don’t do anything around individual behaviors; we’re not interested in how to get your kid to sleep through the night. But we *are* interested in the degree to which noise in your community, if left unaddressed by the community, affects your kid’s sleep. So, we’re interested in those issues of how “what surrounds us shapes us,” as the California Endowment has put it—and I feel that we have a strong platform and are now ready to help other people to become conversant in the use of it and to ask better questions about how good communications research could improve their outreach, their public engagement.

Over the last couple of months, I have been in, I would say, a half dozen meetings about how to communicate on social issues, where, if I closed my eyes, I would have thought it was 1985. What tends to happen is that everyone has an opinion—everyone. And there’s a great quote from David O. Sears:

Everyone, you will find, is an expert on public opinion; after all he is a member of the public and he knows how

he feels and what he thinks about an issue. Or does he? There is a great deal about the way in which people borrow opinions, or reach down into their experience for guidance which is, even for the individual himself, out of sight. . . . We rarely think of our opinions as being formed by group memberships, forgotten childhood experiences, party labels, friendship patterns. . . . Yet, even if people were endowed with perfect self-knowledge, they might not understand what others were doing or thinking.¹

So, because there is no compass, there's no ruler to allow you to sort what is good advice from bad advice. We just end

up in this big lump, and then we generate taglines. These are high-level meetings; I'm talking about people who have the power to bring many high-level communications folks together, and that is the task—to come up with a tagline. So, clearly we are not conceptualizing communications at the level we need to in order to make progress. The MacArthur award makes me cautiously optimistic that we can turn this page and become better nonprofit communicators about social problems and their solutions.

NOTE

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Reframing Issues in the Digital Age: Using Social Media Strategically

by Julie Sweetland and Rob Shore

ONE OF A SOCIAL ADVOCATE'S MOST CRITICAL ACTS IS TO FRAME an issue. In framing, a communicator uses language, metaphor, and other means to bring the community into the issue in a particular way. So, for instance, tobacco control advocates reframed tobacco from a “personal vice” narrative, in which the public discourse centered around individual choice and behavior, to a “defective product” narrative, in which the role of corporate malfeasance and the need for protective regulations became clear. Reframing an issue is hard work, as frames are socially shared and persist over time; but it is worth it, because public opinion and policy preferences are frame dependent. The stories nonprofit communicators tell have the power to make the public more or less supportive of positive changes—for instance, in the way we support human health and well-being, distribute society's resources, and redress long-standing injustices.

Thinking carefully about the frames we reinforce or disrupt by virtue of our storytelling is all the more important in an era

in which nonprofits possess more control than ever before over the means of diffusing ideas. The majority of nonprofit organizations now use social media tools to communicate with the public about the issues related to their missions—and for good reason. Evidence from the Pew Research Center's *Civic Engagement in the Digital Age* suggests that our public square is now largely virtual: the number of social networking site users grew from 33 percent of the online population in 2008 to 69 percent in 2012.¹ Many users say that their activity on social networking sites has prompted them to learn more about social issues and to take action on those issues. But what does meaningful issue engagement look like in the sphere of social media?

Too often, nonprofits have mistaken self-promotion and “click bait” as meaningful contributions to the public conversation on complex issues. “Clicks,” “views,” and “likes” only mean so much if the story they carry isn't helping people to understand the causes of and solutions to complex social issues. More and more, organizations tackling tough social justice issues are recognizing that not just participating in but also changing the conversation is essential to achieving and sustaining meaningful impact. Put another way, issue advocates are increasingly looking to engage more effectively in frame contests, shaping their messages to advance a more

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productive narrative on public issues through the selective use of the messengers as well as the language, symbols, visuals, and other elements of communication that impart meaning and structure understanding.

But can these two elements of a communications strategy reinforce one another? How can reframing social issues take place in social media?

At the FrameWorks Institute, these are questions we hear often in our professional learning opportunities for nonprofit leaders and other issue advocates. As we work together to build the communications capacity of their organizations, we explore answers using the perspective of Strategic Frame Analysis™, which roots communications practice in the cognitive and social sciences.² Our first answer is that framing is already happening in social media—because there is no such thing as frameless communication. The practical dilemma, therefore, isn't whether or not to frame on Facebook but rather whether the frames already in the feed result in a narrative that will support the organization's broader goals. By looking at the framing recommendations that emerge from FrameWorks' original communications research—as well as at the work of leading scholars in the literature on social movements, social and behavioral psychology, political science, and other disciplines that diffuse new ways of thinking—we find evidence-based answers to such practical challenges facing nonprofit communicators as how to effectively talk about a complex issue in 140 characters or less.

Below, we highlight a few ways that social media efforts can go awry, and offer some suggestions for how to maximize the opportunity to self-publish the kinds of messages that support your organization's overall communications strategy and, ultimately, your mission and vision. Our focus is on the framing of messages—the choices about what to emphasize and what to leave unsaid and the selection of the narrative, values, metaphors, and other elements that shape the understanding that results from the communication.

Are Your Posts Contributing to “Compassion Fatigue”?

If your Twitter feed reads as if it were being run by Chicken Little, it's time to hand over the password to The Little Engine That Could. As media scholar Susan Moeller has shown—and numerous other social scientists concur—a steady stream of crisis messaging depletes people's will and ability to engage with social problems.³ While crisis frames can generate clicks, the emotions and understanding they inspire tend to be either fleeting or fatalistic. On the other hand, framing problems so that underlying causes and public solutions are easy to understand offers people ways to appreciate how programming, policy, and civic engagement might make a difference.

By shaping social media posts to support a larger narrative emphasizing that there are solutions beyond problems, nonprofits can avoid draining the public's “finite pool of worry” and begin replenishing supporters' well of willingness to engage.⁴

Avoid: *Latest statistics on elder abuse are just heart-breaking—what if this were your grandmother?*
<http://samplelink>

Advance: *Seniors are mistreated more often than we think. Some states made a difference with this commonsense approach:* <http://samplelink>

Are Your Posts Zooming In on Individuals, Leaving Systems Out of the Frame?

The conscientious reframing of issues is imperative for galvanizing public support and for establishing effective policy. Political scientist Shanto Iyengar has shown, for example, that how people think about poverty depends on the way the issue is framed.⁵ When poverty is framed structurally, people assign responsibility to society at large; when framed episodically, focusing on the circumstances of a specific poor person, people assign responsibility to the individual.

FrameWorks research shows that the American public tends to understand most issues in terms of individual actors, characteristics, and choices. For example, Americans model the education system through the “tangible triad” of students, teachers, and parents—leaving factors such as funding, curriculum, policy, and leadership all but invisible.⁶ Yet, people can also quickly grasp a systemic view with the help of frame elements such as metaphors, which allow them to take the working parts of something they understand and apply them to unfamiliar or abstract issues. (You can get social context into your social media without metaphors, of course, by eschewing tales of triumphant individuals or tragic figures in favor of more thematic stories that bring environments, systems, structures, and policies into the picture.)

Avoid: *Amazing #teachers will come 2gether to pour their hearts + minds into students this school year! RT if you love teachers!*

Advance: *Learning = construction project so teachers need strong scaffolding. This program <http://samplelink> offers critical support, an #edreform must!*

Is Your Social Media Feed Saying, “Enough about You; Let’s Talk about Me”?

While nonprofits must dedicate some portion of their external communications to building their visibility and reputation, recruiting for programs, and otherwise “keeping the lights on,” too much self-promotion or fundraising can hamper rather than build public engagement. Useful and educational posts should vastly outnumber self-referential ones, so that when an opportunity for self-promotion arises, your audience feels that it has gotten good value for its attention and time overall. More importantly, organizations interested in creating social change also learn to take every opportunity to lift up a reframed perspective on their issue, even when doing something as mundane as announcing an event. Don’t be afraid to experiment with a stronger dose of advocacy messaging. Recent surveys of online behavior suggest that the public considers social networking sites an important means of receiving and posting news and ideas on sociopolitical issues.⁷

Less: *Our very own @executivedirector offered insight into our #issue on this exciting panel: <http://samplelink>*

More: *This (<http://samplelink>) gave us lots 2 think abt. @executivedirector: “We need the talents of all to be available to our communities.”*

Is Your Social Media Content Taking Too Much for Granted?

“Most people don’t think about most issues most of the time,” wrote Nelson Polsby and Aaron Widalvsky, in a famous analysis of American public opinion.⁸ The average person has little daily contact with most topics on the public agenda, and, as a result, the stories about social issues are often partial, inaccurate, or outdated. In a recent research project probing ordinary citizens’ thinking about threats to the oceans, FrameWorks found widespread confusion between carbon dioxide and carbon monoxide, leading people to conclude that climate change would cause mass suffocation.⁹ In another study on the social determinants of health, we found that few people could name influences on health beyond diet and exercise.¹⁰

Typical nonprofit messaging doesn’t help the public get smarter about issues; FrameWorks’ systematic reviews of nonprofit communications have revealed a ubiquitous “invisible process” frame: how causes lead to consequences is left out entirely. Yet, our research has also shown that people can quickly grasp expert insights and begin to reason using research-based concepts, as long as they have a well-framed

explanation using metaphors or causal sequences. Explanation is a worthy and important goal for nonprofit communications: it can help people to become more informed and more effective advocates for change. In this context, sharing news about a particular aspect of an issue can either help or hinder the public’s understanding of how your issue works at the most fundamental level. If you imagine your social media posts as a set of mini-lessons for people who know little or nothing about your issue, how would you change your approach to them? If you think of your most important content as an overarching umbrella awareness campaign that teaches how the world works when it comes to your issue, what kinds of ideas should you share more often?

Avoid: *@studyauthor’s new report shows that atmospheric CO₂ concentration reaches 401 PPM: <http://samplelink>*

Advance: *Use of fossil fuels for energy causes rampant CO₂ to build up, trapping heat worldwide. Learn more from @studyauthor: <http://samplelink>*

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As the world of mass communications moves away from a broadcast model of information sharing to a networked, social engagement model, the tools of opinion making are now in the hands of advocates. But the medium is not the message, and the tools, if not used with care, can have little—or even harmful—effect. Every nonprofit’s communications plan should consider the larger frames that attend to its issue and a strategy for reframing the issue, ideally looking to research that can help communicators understand which frames to advance and which to avoid—and why. Once the broader communications goals and framing strategies are clear, social networking sites can become a channel for diffusing potent reframed messages into the community of followers and friends.

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Disruptive Hybridity: The New Generation of Political Advocacy Groups

by David Karpf

Editors' note: *The following was adapted from The MoveOn Effect: The Unexpected Transformation of American Political Advocacy, by David Karpf (New York: Oxford University Press, 2012).*

MOST AGREE THAT THE INTERNET'S EFFECT ON AMERICAN political organizations has been profound. That said, current research about the Internet and politics holds two competing claims to be true. First, the new media environment has enabled a surge in "organizing without organizations." We no longer need organizations to start a petition, create media content, or find like-minded individuals. Second, many fundamental features of American politics—from the average American's lack of political knowledge or interest to the elite nature of major political institutions—remain unchanged by the new media environment. Everyone can now speak online, but surprisingly few can be heard.

I offer a third claim that modifies both of these perspectives: changes in information technology have transformed the

organizational layer of American politics. A new generation of political advocacy groups have redefined organizational membership and pioneered novel fundraising practices. They have crafted new tactical repertoires and organizational work routines. Political mobilization is rarely spontaneous, and the organizations that mobilize public sentiment have changed as a result of the Internet. The real impact of the new media environment comes not through "organizing without organizations," but through organizing *with different* organizations.

Though Internet-mediated organizations have played a prominent role in American politics for a dozen years, we still know very little about their operation; amid all the attention to trends in social media, the transformation of political organizations has gone overlooked.

#WIUnion

For three and a half weeks, from February 16 through March 9, 2011, Wisconsin was home to the largest American labor protest in a generation. Unlike the Egyptian uprising that occurred mere weeks beforehand, public observers did not attribute a causal role in the Wisconsin protests to social media—no one believes Twitter caused the Wisconsin

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standoff. The Internet did play an essential mediating role, however, and it is through such large-scale events that the important niche now filled by a new generation of political advocacy groups becomes clear.

The labor protests in Madison began as a local reaction to a state policy matter. On February 15, 2011, recently elected Republican Governor Scott Walker unveiled his budget repair proposal. Included in the bill was a provision that would dramatically curtail the collective bargaining rights of public employee unions. Under the guise of a short-term budget crisis, the new governor was attempting to cripple a core constituency of his Democratic opposition. Unions are not only reliable sources of Democratic-leaning votes; they also provide key organizational support during election seasons. As such, weakening the union movement is in the long-term electoral interests of the Republican Party network. With Republican majorities in Wisconsin's state senate and state assembly, Walker had every reason to expect his bill to pass quickly into law. Democrats were outraged, but they had few bargaining chips. The entire fourteen-member Democratic state senate delegation (quickly dubbed "the Wisconsin 14") decamped to neighboring Illinois, forestalling an immediate vote. Local union members turned out by the thousands, setting up a massive peaceful demonstration within and around the capital building, and the national labor movement—organizations like the American Federation of Labor and Congress of Industrial Organizations (AFL-CIO) and the Service Employees International Union (SEIU)—quickly joined these protesters.

The labor movement was not alone in this conflict; the netroots also immediately joined the fray. MoveOn.org reached out to its five million members, generating 150,000 notes of support for the Wisconsin 14 in a matter of days, and DailyKos, Democracy for America (DFA), and the Progressive Change Campaign Committee (PCCC) all launched fundraisers for the state senate delegation. On February 27, a netroots-led coalition held solidarity rallies in every state capital, drawing fifty thousand attendees and additional press attention nationwide. Meanwhile, Madison became "ground zero" for netroots organizers. Bloggers and field campaigners arrived in the state capital to help coordinate logistics, organize pressure tactics, and cover the details of the struggle. Armed with flip cameras, they interviewed local protesters and rapidly compiled issue advertisements. They then quickly turned to their national membership base for funding, and placed the commercials on local television.¹

The nearly monthlong protest was the "largest continuous demonstration for workers rights in decades."² Daniel Mintz, MoveOn's advocacy campaign director, remarked,

"What happened around Wisconsin showed the most energy since 2008 and, in a non-electoral context, since the start of the Iraq War."³ Though the governor obtained passage of his bill on March 9, by then the damage had been done. His public approval ratings plummeted, and the Republican governor of nearby Indiana decided against pursuing a similar bill due to fear of public reprisal.⁴ An energized coalition of local and national progressive organizations immediately announced recall campaigns against six vulnerable state senate Republicans. Democracy for America alone hired thirty-five field staff to work full-time on those recall efforts. The August special elections succeeded in unseating two of those senators, considerably narrowing the Republican senate majority.

There are three important lessons about the Internet and political advocacy that we should take from Wisconsin. The first is that Internet-enabled political organizing moves *fast*. Prior to the protests, netroots organizations like the Progressive Change Campaign Committee and Democracy for America had no developed staff capacity in Madison. Yet, within forty-eight hours of the day Governor Walker unveiled his bill, they had diverted their attention away from the federal level, re-tasking key staffers, educating their membership, crafting online petitions, and raising funds. Over the following two weeks, they had organized mass protests in fifty state capitals. In an era of twenty-four-hour news channels, blogs, and Twitter updates, news cycles move fast, and netroots organizations have fashioned themselves to keep apace.

The second lesson is that the interest group ecology associated with the Democratic Party network has changed. The liberal coalition has for decades been composed of single-issue groups that remain concentrated within their "issue silo." The American Civil Liberties Union (ACLU) and the Sierra Club may agree in spirit with the Wisconsin protesters, but they aren't going to mobilize staff and financial resources to support them. Members donate to these groups to represent their interest in civil liberties or environmental protection. Their annual dues provide a reliable basis for lobbying staff and policy experts, both in Washington, DC, and in states across the country. The netroots define membership differently, disassociating it from financial transactions. Instead, they rely upon a fluid fundraising model based on targeted, timely action appeals. As a result, the netroots become "issue generalists." Staff structures and tactical repertoires are all built around the Internet. This yields new work routines, communications practices, and broad strategic assumptions. While other left-leaning interest groups remained focused within their traditional issue silos, the netroots swarmed to Wisconsin, providing a nationwide cavalry and expanding the scope of the conflict.

The third lesson is that Internet-mediated political organizing is hardly limited to blog posts and e-petitions. Critics who dismiss Internet activism as mere “clicktivism” focus attention on particular digital tactics and argue that historic movements for social change require deeper commitments and stronger ties than those found on Facebook or Twitter.⁵ Some proponents of Internet activism, also focusing on these digital tactics, argue that they are a new form of action and should be treated as “social movement theory 2.0.”⁶ Neither of these perspectives captures what we saw in Wisconsin, where a new generation of large-scale organizations demonstrated their capacity to mobilize substantial resources over a sustained time period. By ignoring the organizational layer of the public sphere, we have missed important developments in American political engagement.

Divergent Internet Effects: Organizing without Organizations

Within Internet studies, there is a popular line of thinking concerned with “organizing without organizations,” “open-source politics,” or “social movement theory 2.0.”⁷ According to this strand of theory, the traditional logic of collective action has been fundamentally altered by the lowered transaction costs of the new media environment.⁸ The argument is that formal organizations are no longer necessary, since individual tactics like e-petitions can now be organized online and information can spread virally through social media channels like blogs, YouTube, Facebook, and Twitter. In other words, we are all our own publishers and political organizers now.

The “theory 2.0” tradition has made a substantial contribution in identifying the significant implications of lowered online transaction costs. Indeed, “mass self-communication” is now possible in a manner unlike ever before.⁹ And social network-based communication occasionally spirals into collective action, leading to online protest actions and offline political scandals. In the language of social movement scholars, we have seen the birth of new “repertoires of contention.”¹⁰ Online groups can form through Facebook. Offline meetings can be organized cheaply through Meetup.com. Political campaign commercials can be remixed and posted on YouTube, garnering millions of views. Media content is now spread through Twitter and the blogosphere, bypassing traditional gatekeepers. The costs of engaging in many individual acts of political speech have become infinitesimal, particularly in a stable democracy like the United States, where citizens do not face the looming threat of government reprisal.

But critically missing from this line of research is the notion of *scale*. Lowered transaction costs have made individual political actions far easier, yet sustained collective action

continues to require organization. Indeed, every large-scale example of “open-source organizing” or “commons-based peer production,” be it the Linux operating system or Wikipedia, develops an organizational hierarchy of some sort.¹¹ Linux is run by Linus Torvalds and his “lieutenants,” and a large proportion of the edits to Wikipedia come from a core group of volunteer administrators. The political arena is no exception. Large-scale contests over political power, such as occurred at the Wisconsin state capital, require organization. Changes in communications technology alter one set of organizing constraints by dramatically lowering the marginal cost of communication. But another set of political fundamentals remains unchanged.

Largely in response to the “organizing without organizations” line of research, a set of critics have emerged, dismissing online activism as mere “clicktivism,” or “slacktivism.”¹² According to their arguments, the Internet’s effect on political institutions is minimal, and may even have deleterious unintended consequences. Malcolm Gladwell suggested, in a widely read *New Yorker* essay, that “the revolution will not be tweeted.”¹³ He argued that social media tools fail to promote the type of strong interpersonal ties necessary for successful social movement organizing. Stuart Shulman has warned that waves of e-petitions and online public comments will swamp federal agencies in “low-quality, redundant, and generally insubstantial commenting by the public,” drowning out more substantive citizen participation.¹⁴ Evgeny Morozov dismisses most digital activism as “slacktivism” and argues, “Thanks to its granularity, digital activism provides too many easy ways out.”¹⁵ Waves of new online communications tools lower the costs of citizen input, and this in turn unleashes waves of low-cost symbolic actions with little or no political impact. Underlying these observations is a deeper concern that, to the extent that e-petitions and Facebook clicks substitute for deeper citizen engagement, they may breed resentment and increased apathy toward government action. When all that clicking produces no change, they reason, citizens will turn bitter or tune out.

The “clicktivism” critics are right to question the value of an individual e-petition or Facebook group. Judged by the standard of traditional power analysis, which Robert Dahl classically defined in 1957 as, “A has power over B to the extent that he can get B to do something that B would not otherwise do,” the average e-petition is a shallow intervention indeed.¹⁶ Powerful actors are unlikely to choose a different course of action solely on the basis of a digital signature list. But it is also only a single tactic. As we saw in Wisconsin, such tactics hardly capture the extent of online organizational ventures. Furthermore, as we will see in the following

section, such criticisms lose their sting when placed within the context of political advocacy organizations. The average e-petition is indeed of minimal value, viewed in isolation. But so is the average written petition. Digital activism is not a replacement for the Freedom Riders of the 1960s; it is a replacement for the “armchair activism” that arose from the 1970s interest group explosion.

The Organizational Layer of Politics

An intermediary layer exists between government institutions and the mass citizenry. My interest lies in this often-overlooked corner of political communication research—the organizational layer of American politics that facilitates interaction between government elites and mass publics. Studies of political organizations have a grand pedigree in political science, dating back to the early pluralists who viewed government as a neutral arbiter in the battle between organized citizen interests.¹⁷ As we have learned more about the fundamentals underlying political institutions and political behavior, organizational studies have drifted into isolation. Part of the problem is methodological: it is nearly impossible to establish the immediate impact of such groups. The field of interest group competition rarely features unambiguous wins. As Baumgartner et al. recently demonstrated, identifying who wins and who loses among interest groups is a daunting proposition in its own right, with no “magic bullets” among the various tactics and strategies.¹⁸ Merely estimating the size of the interest group population is a devilish problem.¹⁹

The organizational layer of politics is not particularly large.²⁰ Compared to the size of the national population, issue-based political mobilization is minuscule. The largest day of protest in Wisconsin drew approximately 100,000 citizens, a fraction of the state population of approximately 5,600,000. Tea Party protesters at each of the 2009 Health Care Congressional Town Hall meetings numbered in the dozens, yet those dozens drove a national media narrative. MoveOn’s five million members represent less than 2 percent of the American population. These are numbers that would fit within the margin of error in a nationally representative survey.

Yet there is good reason to believe that the makeup of the organizational layer matters a great deal for broader political concerns. Theda Skocpol has found that the late-twentieth-century decline in American social capital is likely tied to the disappearance of cross-class federated membership associations during the 1970s. Until that time, social capital was built and maintained through civic organizations. Those organizations changed when membership and fundraising regimes, along with the broader government opportunity structure, shifted to favor professionalized, DC-based advocacy

groups.²¹ It stands to reason that the new wave of Internet-mediated organizations will also play an intermediary role in defining civic beliefs and citizenship ideals.²²

In a similar vein, recent scholarship documents the central role that political organizations and informal party coalitions play in public policy decisions. Steven Teles documents the central role played by conservative organizations like the Federalist Society in fostering a broader conservative legal movement that has reshaped the federal courts.²³ Jacob Hacker and Paul Pierson argue that American economic policy-making has been driven firmly to the right by a network of conservative think tanks and advocacy organizations founded in the “lost decade” of the 1970s.²⁴ Seth Masker argues that the deep polarization of legislative politics is driven by informal party organizations at the local level that control resource flows around political primaries.²⁵ Political party networks are composed of both individuals and organizations. Changes in the composition and ideological position of these party networks affect the content of American policy-making.

The Internet and Disruption Theory

The concept of disruptive innovation features heavily in this narrative. The Internet has been fruitfully described as a “sequence of revolutions.”²⁶ Because innovation continues at such a rapid pace on the Internet, it has proven to be an enduring challenge for those studying its effect on politics. YouTube did not exist during the 2004 election, yet it was a fixture by 2008. The microblogging service Twitter was still in its infancy in 2008. It is a fixture of the media landscape today. Now that mobile web devices like the Android phone and the iPhone are rapidly gaining market penetration, new social experiments with geolocational data are being devised. In the time that elapses between my completion of this manuscript and its physical arrival upon a bookshelf, another major innovation or two is likely to be heralded for “changing everything.”

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As we have seen in communications industries such as book publishing, newspapers, and music, the Internet exhibits a tendency toward fostering disruptive forms of innovation. The new media environment has put traditional commercial sectors into disarray. It is a classic example of what Clayton Christensen calls the distinction between “disruptive” and “sustaining” innovations. Sustaining innovations offer incremental performance improvement in an existing field of production. Disruptive innovations foster the rise of a competing field of production. In so doing, they undercut existing market forces.²⁷ Under such circumstances, the advantages

of traditional organizational bases of production are undermined; the stable revenue streams that supported those organizations became unreliable.

Moments such as these tend to exhibit a generational character: old industrial leaders decline and new industrial giants emerge. We are now witnessing the same pattern unfolding in the nonprofit advocacy sector.

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discussion of online protest actions, see Martha McCaughey and Michael D. Ayers, eds., *Cyberactivism: Online Activism in Theory and Practice* (New York: Routledge, 2003); for a discussion of hybrid political scandals, see Andrew Chadwick, "The Political Information Cycle in a Hybrid News System: The British Prime Minister and the 'Bullygate' Affair," *The International Journal of Press/Politics* 16, no. 1 (2011): 3–29.

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12. For illustrative examples of this critique, see Stuart W. Shulman, "The Case Against Mass E-mails: Perverse Incentives and Low Quality Public Participation in U.S. Federal Rulemaking," *Policy & Internet* 1, no. 1 (2009): 23–53, Gladwell, "Small Change: Why the Revolution Will Not Be Tweeted," Micah White, "Clicktivism Is Ruining Leftist Activism," *The Guardian*, August 12, 2010, www.guardian.co.uk/commentisfree/2010/aug/12/clicktivism-ruining-leftist-activism, and Evgeny Morozov, "The Brave New World of Slacktivism," *Foreign Policy*, May 19, 2009, neteffect.foreignpolicy.com/posts/2009/05/19/the_brave_new_world_of_slacktivism; and Morozov, *The Net Delusion: How Not to Liberate the World* (New York: Penguin Press, 2012).

13. Gladwell, "Small Change: Why the Revolution Will Not Be Tweeted."

14. Shulman, "The Case Against Mass E-mails," 25–26. For a direct rebuttal, see Karpf, "Online Political Mobilization from the Advocacy Group's Perspective: Looking Beyond Clicktivism," *Policy & Internet* 2, no. 4 (2010): 7–41, davekarpf.files.wordpress.com/2009/03/online-political-mobilization-from-the-advocacy-groups-perspective-1.pdf.

15. Morozov, *The Net Delusion*, 190. Morozov's broader argument concerns the threat that digital tools, poorly deployed, can pose in unstable regimes. On the broader point, I concur, but his writing paints digital engagement tools with a particularly broad brush.

16. Robert A. Dahl, "The Concept of Power," *Behavioral Science* 2,

no. 3 (1957): 201–15. The gendered pronoun “he” is an artifact of the times. I leave it here to emphasize how deeply rooted this definition of political power is. There are contrasting definitions and a whole literature devoted to the subject—see William H. Riker, “Some Ambiguities in the Notion of Power,” *American Political Science Review* 58, no. 2 (1964): 341–49, Jack H. Nagel, *The Descriptive Analysis of Power* (New Haven, CT: Yale University Press, 1975), Charles Tilly, *From Mobilization to Revolution* (New York: Random House, 1978), and Peter Bachrach and Morton S. Baratz, “The Two Faces of Power,” *American Political Science Review* 56, no. 4 (1962): 947–52—but Dahl’s simple definition remains both elegant and generally appropriate.

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21. Theda Skocpol, *Diminished Democracy: From Membership to Management in American Civic Life* (Norman, OK: University of Oklahoma Press, 2003).
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24. Jacob S. Hacker and Paul Pierson, *Winner-Take-All Politics: How Washington Made the Rich Richer—And Turned Its Back on the Middle Class* (New York: Simon and Schuster, 2010).
25. Seth E. Masket, *No Middle Ground: How Informal Party Organizations Control Nominations and Polarize Legislatures* (Ann Arbor, MI: University of Michigan Press, 2009).
26. John Zysman and Abraham Newman, eds., *How Revolutionary Was the Digital Revolution?* (Stanford, CA: Stanford University Press, 2006).
27. Clayton M. Christensen, *The Innovator’s Dilemma: When New Technologies Cause Great Firms to Fail* (Boston, MA: Harvard Business Review Press).

The Explanation Gap: How Democracy Depends on Nonprofit Organizations

by Joseph Grady and Axel Aubrun

If a nation expects to be ignorant and free . . . it expects what never was and never will be.

—Thomas Jefferson

People's inability to understand basic scientific concepts undermines their ability to take part in the democratic process.

—Jon D. Miller, director of the Center for Biomedical Communications at Northwestern University Medical School (NYTimes.com “Scientific Savvy? In U.S., Not Much”)

Well-informed laymen make up the foundation of a healthy society.

—Charles Schulz

ADVOCATES OFTEN DEFAULT TO A COMMUNICATIONS APPROACH that can work in the short run, but whose effectiveness is very limited over the long haul. A strategy based on “gaining mindshare,” “breaking through the communications clutter,” and so forth, can certainly succeed in bringing an issue “top of mind,” but it is also very likely to leave the public in the dark about the big picture surrounding an issue. This tradeoff severely limits the impact that nonprofits can have on the most important challenges that face our society, because it ignores the critical relationship

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between nonprofits and democracy. Put simply, nonprofits need democracy to bring about long-term solutions, often through policy changes; and democracy in turn depends on nonprofits to educate the public about the important and critical issues that face us.

Americans from Thomas Jefferson to Charles Schulz have affirmed one of the basic principles of American democracy: Government by the people requires that the people actually understand the issues, situations, and decisions with which they are faced. The alternative, they warn, is all too often manipulation of the people by those who do understand.

In fact, as advocates at nonprofit organizations realize all too well, the public often understands frighteningly little about critically important issues. Too few Americans, for example,

understand that Social Security taxes are not directly repaid to us when we retire; that the current economic disparities among different ethnic groups were partly created by the historical distribution of opportunities like the G.I. Bill; that global warming is caused by a layer of carbon dioxide that is accumulating in the atmosphere and trapping in heat; that current commercial fishing techniques (unrelated to pollution) inevitably disrupt vital ecosystems; that early maltreatment of children (including neglect and emotional abuse) can affect the development of brain architecture; and so forth.¹ Without this basic understanding, the American people often aren't prepared to make the informed decisions that are central to the democratic system. And in the absence of public understanding, the democratic machinery typically fails to engage, and does little to provide real solutions to these collective challenges.

In short, nonprofits have a key—and too often neglected—role to play in our democracy, in helping people *understand* the basics of a public-interest issue, the steps that can be taken to fix it, and the role that citizens can play. In this paper, we discuss recent advances in addressing the challenge of educating the public—one that is based on providing simple and effective explanations of complex or abstract issues.

Who Informs the Public?

There are two sectors of society that are widely understood to have a role in creating the educated public that democracy depends on: first, schools are supposed to equip us with the basic skills and knowledge that allow us to assimilate new facts—in a word, *literacy*. Second, journalism's role is to *inform* us about the particular issues and situations that are currently facing us. But schools, even at their best, obviously can't prepare Americans to reason effectively about all the important issues we must contend with, if only because the world and our understanding of it are constantly and rapidly evolving—many important contemporary issues were simply not on the radar when current voters were ten years old.

Nor can the news media be counted on to provide the public with the kinds of explanations that can help us make truly informed judgments. In part, this is because of the often-discussed biases toward sensationalized coverage, “status quo” sources, easily gathered material, stories that don't threaten corporate sponsors, etc. A more fundamental problem is that journalism's inherent emphasis on facts means that *explanations*—of causality, of bigger-picture contexts, etc.—take second place at best. (Political scientist Shanto Iyengar has discussed a closely related problem with TV news in particular—the predominance of “episodic” coverage, about specific incidents, and a near-absence of

“thematic” coverage, about trends and contexts.²) The inadequacy of media coverage by itself is evidenced by the fact that decades of information about global warming in the news (e.g., the rise in average temperatures, the potential for ice cap melting), has not resulted in widespread understanding of how the phenomenon works, even on the simplest level.

In short, American democracy is diminished by what we call an *explanation gap* in the public discourse. The consequences of this gap should not be underestimated. Effective explanations not only increase awareness of particular issues, they also allow the public to understand the choices that face us as a society. Ultimately, they make democracy possible.

The role of a third sector in American society in helping the public understand issues is less widely recognized. As Alexis de Tocqueville pointed out a century and a half ago, organizations that are neither commercial nor governmental play a critical role in the American democratic process. By identifying and promoting public interest issues, he argued, “voluntary associations” allow the public to make collective choices about issues that would otherwise have escaped the democratic process. They feed the machine of democracy.

As society, science, and technology become more complex, it becomes increasingly apparent that a key part of “identifying and promoting” the issues is explaining them, and so a more specific role has emerged for nonprofits: namely, to help bridge the explanatory gap. Nonprofits are well positioned for the role, since they have the expertise and the means to introduce issue-explanations into the national conversation, by passing explanations along to the media when their issue “hits the news,” for example. Importantly, this role transcends particular issues—it concerns the health of American democracy as a whole.

Explanations that Work³

Crafting good explanations, however, is not always as easy as it seems, and there are a number of ways in which explanations can (and often do) “misfire.”

Going over people's heads. One reason that advocates and experts go over people's heads is that they are so deeply involved in an issue that it can be very difficult for them to see past their own assumptions about what people know and understand. An explanation that seems ridiculously simplistic to an insider can still be too technical and jargon-filled for a layperson to understand. Consider these two issue explanations presented (by nonprofit organizations) with broad general audiences in mind:

Global warming: Solar radiation passes through the clear atmosphere. Most radiation is absorbed by the earth's surface and warms it. Some solar radiation is reflected by the earth

and the atmosphere. Some of the infrared radiation passes through the atmosphere, and some is absorbed and re-emitted in all directions by greenhouse gas molecules. The effect of this is to warm the earth's surface and the lower atmosphere.

Biomagnification: The most dangerous traits of the organochlorines are their persistence—that is, their tendency to remain chemically active for a long time—and their solubility in fat, which means they become stored in fatty tissues within organisms and can accumulate over time. Because of these two traits, contaminant levels become more concentrated with each step up in a food chain—a process known as *biomagnification*.

Many readers would be puzzled by the language in these passages, and many more would simply ignore the text altogether, since it seems to be written for “someone else”—that is, people with special scientific knowledge. This prose might be suitable for people interested in “digging deeper” to understand more about the problem, but not for people who are learning about it for the first time, and who do not already have a special interest in the topic.

Reinforcing the wrong ideas. Besides going over people's heads, another common trap advocates fall into is to reinforce ideas that work directly against the goals of a communication. For example, when a rural advocacy group tells readers, without further context, that “fewer than 15% of rural residents receive any federal housing help,” this can easily sound like *good* news—confirmation of the common view that rural people live simpler, more self-sufficient (and therefore better) lives than those of us in urban America.

And when an organization offers the following explanation of risk factors for diabetes among African Americans, it practically ensures that readers will blame the individuals for their behavior, rather than learning something about public health and the contexts that lead to disease:

Being overweight or obese, not getting regular physical activity, and not eating enough fruits, vegetables, and whole-grain foods are linked to increased risk of developing diabetes. On average, African American adults and adolescents have very high rates of overweight and obesity as well as low rates of meeting physical activity and fruit and vegetable intake recommendations.

Facts vs. explanations. Each of the last two examples illustrates another, even more fundamental problem in many advocates' communications—the emphasis on statements of fact rather than explanations that provide new understanding. These are often treated as interchangeable, but in terms of the effects they have on people's thinking, they are anything

but. At this point, it is worth considering a bit more deeply what it really means to inform people.

Engaging the “Responsible Mind”

The findings from decades of research into how people think offer some important lessons for communicators who are interested in helping people reason more effectively about issues and become more engaged with them (the two typically go together). Here are two basic principles that emerge from the cognitive and social sciences.

Cognition is not organized around facts, but around what researchers call *frames, schemas, models, scripts, scenarios*, etc.

Unless explained properly, facts can tell a very different story from the one that is intended (and true). This is because facts are only understood in terms of the richer mental models within which they fit. A fact like “poverty has doubled in the county over the past five years” can mean many different things depending on the particular mental *models* of poverty that are guiding people's reasoning. Although poverty can be defined quantitatively in terms of income and assets, these definitions don't capture how laypeople actually understand the term. People's models or frames for poverty involve ideas about why people are poor (e.g., “they don't work hard” or “they're born into a set of disadvantages”), ideas about what the day-to-day experience of poverty is like (e.g., images of violent urban housing projects, or of rustic family scenes), and so forth. To really help people understand a point about poverty—and especially, to change their current understanding—communicators need to offer true explanations, involving cause and effect, for example, rather than just numbers and static images.

The mind works most easily and naturally with simple, concrete images.

This is a straightforward point, but one that advocates often ignore or don't fully appreciate. Explanations should be as concrete as possible, even if this means providing metaphors and analogies for topics that are inherently abstract. (After all, much of people's everyday thinking and language uses metaphors as simple as “heavy workload,” “*approaching* completion,” etc.). Even a highly educated audience grasps concrete ideas much more quickly and effectively.

When explanations follow these principles, they are much more likely to help change thinking.

Issue Examples

Consider the following issue areas, where progress has come along with increased understanding:

Ozone hole. While the problem is not yet solved, very substantial steps have been taken to address it. Not coincidentally,

a high proportion of Americans know that aerosols and CFCs have a destructive effect on the ozone layer,⁴ and that the resulting “hole” allows sunlight to penetrate the atmosphere in harmful ways. The very concrete language (and images) of the ozone hole—which seems like a hole in our metaphorical “roof”—have certainly been factors in helping American society grasp and take responsibility for the problem.

Mental health. There is still a great deal of progress to be made in educating Americans about mental health, but there has also been an undeniable change for the better on the levels of both attitudes and policy. Behind this change is the growing understanding that brain chemistry and anatomy contribute to behaviors that used to seem simply “crazy” or “bad.” Various nonprofits have helped promote messages about “brain disorders” and “chemical imbalances,” for instance. Even if only understood in a simplistic way, these biological explanations for behavior have had the virtue of concreteness, and have opened the door to entirely new ways of understanding familiar problems.

Tobacco. The history of the tobacco issue is very complex, but explanation is certainly one of the factors that has led to more restrictions on the use of tobacco products. For instance, people now recognize, as they did not a generation ago, that cigarette smoke contains chemicals that are physically addictive, and that second-hand smoke has health consequences for nonsmokers.

In each of these cases, the public has been offered a concrete explanation involving cause and effect, and the result has been that parts of people’s minds that would otherwise not have been engaged have helped them view the problem in new ways. (For further discussion of these principles of explanation, see the e-zines on “simplifying models” and “causal sequences,” authored by Cultural Logic for the FrameWorks Institute—www.frameworksinstitute.org/products/kids.shtml.)

Does an explanation really work? Journalists and experts (e.g. economists, biologists) sometimes hit on an explanation that works well with the public. The term “ozone hole,” for instance, was coined by a chemist, Sherwood Rowland, and publicized by Walter Sullivan of the *New York Times*. (Note, by the way, that the idea of a “hole” in the ozone layer is an effective *metaphorical* explanatory concept—there is no literal hole, but only a diminished density in a particular region.)

But getting an explanation right is so important that it probably shouldn’t be left to chance, especially given that many explanations that sound promising actually prove to be startlingly ineffective. The history of the global warming issue is sobering and instructive here. The term “greenhouse effect” was coined in 1896 by Swedish chemist Svante Arrhenius.

Even though this seemingly clear explanatory model has been widely publicized for many years, it has not entered the minds of the American public. In Cultural Logic’s experience talking with several hundred laypeople about the issue of global warming, we found that virtually none used the term “greenhouse” when trying to explain how global warming works—not coincidentally, virtually none were aware of the basic heat-trapping mechanism behind global warming, which the greenhouse analogy is supposed to convey.

In short, even when it seems like an explanation has the right qualities, it is well worth doing research to determine whether it actually works with “real people”—or is doomed by the fact that people have little experience with greenhouses, for example, and aren’t truly conscious of how they trap the sun’s heat. And nonprofits are the actors who are the most likely to invest time and resources in making sure. Journalists’ deadlines generally call for an instinctive approach to expressing ideas, and in any case, empirical communications research is certainly not part of their job description. Nor do social and physical scientists typically see communication as a critical part of their mission. In effect, one of the important roles for nonprofits is to serve as translators—finding effective ways of expressing expert findings in forms that journalists can disseminate for the purpose of true public information.

The Place of Explanation in Communications

We have focused on explanation as one of the chief purposes of nonprofit communication, and now it will be helpful to place this approach in a somewhat broader context.

A complement to moral and emotional appeals. Explanation is certainly not a replacement for appeals to “do the right thing,” but rather a critical complement to it. It is right to help suffering children, to make sure that all Americans have access to healthcare, to prevent the unnecessary extinction of species—and it is both appropriate and effective (to an extent) to make moral appeals on behalf of these causes. But explanation is a dimension of communication that is often given much less attention, with the result that additional sources and dimensions of motivation are left untapped (not to mention the fact that democratic public discourse is also being diminished).

Organizations have also been told that they must appeal to potential funders and supporters by tapping into people’s pity, fear, or guilt, by putting a (pathetic) “face” on an issue, and so forth. In fact, many advocates recognize at some point in the history of their issue that this approach can produce early success but then lead to a “dead end,” as sympathy and altruism are tapped out, or problems begin to seem overwhelming. Once again, a lack of understanding can essentially put a ceiling on how far support will go.

A counterbalance to personal responsibility. Importantly, explanations help advocates overcome one of the chief obstacles they typically face—the idea that all problems can be solved by (or are caused by lack of) *personal responsibility*. People in poverty can “work harder to get out of poverty.” People without health insurance should “earn more so they can afford decent coverage.” Child abuse would stop if “bad parents would learn to control themselves.” Racial disparities (if they exist at all) “are the fault of minorities who blame everyone but themselves for their problems.” The emphasis on individual responsibility is characteristic of American thinking in general, but is also promoted by an advertising culture that encourages people to think like individual consumers, as well as by some conservative communicators, who put a near-exclusive emphasis on individual responsibility for either ideological or strategic reasons. (This position obscures the role of corporate responsibility, for instance.) Overall, nonprofits working to make change are often fighting uphill against patterns of thinking that are very easy for people to fall into. *This is all the more reason why nonprofits must work hard to provide explanations that effectively open people’s eyes to the big picture.*

Explanation and “framing.” Explanation is only one aspect of effective communications that nonprofits produce in order to create progress on their issues and an informed environment for democratic deliberation. There are various other critical aspects of communication that complement and reinforce effective explanation, such as the careful choice of messengers (e.g., businesspeople who can credibly explain the practical value of a particular after-school program); association of an issue with the core values it relates to; emphasis on available, effective solutions, rather than just problems and “symptoms”; expansion of the scope of any issue beyond affected individuals to the community context; and so forth. (See the FrameWorks Institute’s Web site www.frameworksinstitute.org for discussion of a comprehensive, empirically based, interdisciplinary approach to strategic framing as a whole). Within this broader picture of communications, effective explanation is one key component that works in tandem with all the others.

Conclusion

Nonprofits work on the hard issues—the ones where progress is difficult by definition, or there wouldn’t be organizations devoted to working on them. These are also the kinds of

issues for which we need democracy, where collective action or informed pressure on policymakers can yield positive outcomes for many citizens and for society as a whole. But in order for the democratic process to function as it supposed to on difficult issues, explanations are critical. And nonprofits have a special opportunity, and responsibility, to help provide them. In effect, it is often up to nonprofit communicators to “teach” the issues of the day.

As one important indicator of the current place of explanation in an organization’s communications approach, we suggest a simple test: Examine the organization’s Web site. Does it offer an explanation of the core ideas at the heart of the issue? Or does it assume that anyone worth reaching already “gets it”? If an organization works on “community reinvestment,” on “single-payer” health coverage, or “food security,” does the site explain what the term means, for the benefit of the many individuals who might be helpful to the cause but who do not fully understand the phrase? Here are some other basic questions:

If there is an explanation, is it effective (and what evidence might there be about this)?

How prominently is the explanation placed? Is it “buried” in a late paragraph or a deep, internal link?

Answers to these questions say something important about how an organization sees its role—and the role of an informed public—in a democratic society.

NOTES

1. Here and elsewhere throughout this paper, we refer to findings from research conducted by Cultural Logic on behalf of various nonprofit organizations across the country, usually in partnership with the FrameWorks Institute.
2. Iyengar, Shanto. *Is Anyone Responsible?: How Television Frames Political Issues*. 1991. Chicago: University of Chicago Press.
3. Many of the examples of effective and ineffective communication in this section are drawn from our own work with nonprofit organizations throughout the country (often in partnership with the FrameWorks Institute). We offer no identifying information about the organizations in these cases, which are not intended as individual critiques but rather as illustrations of widespread patterns in advocacy.
4. In fact, Cultural Logic researchers were startled to find, in conversations with hundreds of Americans about global warming, how many mentioned CFCs specifically (even if erroneously) in connection with the issue.

