Brand Positioning and Key Messages: Findings Presentation

March 9, 2008

Prepared for: THE BELOVED COMMUNITY

Volunteering redefined
Agenda

1. Introductions
2. Timeline
3. Branding Overview
4. Non-Profit Brand Audit
5. Discovery Results
6. Recommendations
7. Open Discussion
8. Next Steps
Introductions / Team

**Taproot Foundation**
- Project Manager, John Gagliardi
- Brand Strategist, Scott Tang
- Marketing Manager, Lisa Mendelsohn
- Copywriter, Hsuan Chou
- Account Director, Johanna Rahal

**The Beloved Community**
- Executive Director, Jonathan Swain
- Chairman of the Board of Directors, James Miller
- Executive Assistant, Rosalyn Patton
## Project Timeline

<table>
<thead>
<tr>
<th>Stage 0</th>
<th>Preparing for Launch</th>
</tr>
</thead>
<tbody>
<tr>
<td>Duration/ Weeks</td>
<td>Varies</td>
</tr>
<tr>
<td>Actions</td>
<td>Client receives Letter of Intent (LOI) &amp; takes actions described.</td>
</tr>
<tr>
<td>Taproot Foundation Deliverables</td>
<td>Letter of Intent</td>
</tr>
<tr>
<td></td>
<td>Service Grant Blueprint</td>
</tr>
<tr>
<td></td>
<td>Service Grant Award</td>
</tr>
<tr>
<td>Client Deliverables</td>
<td>Several as detailed in Service Grant Blueprint</td>
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<tr>
<td></td>
<td>Copy of Service Grant Award signed by client</td>
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</table>

<table>
<thead>
<tr>
<th>Stage 1</th>
<th>Kickoff</th>
</tr>
</thead>
<tbody>
<tr>
<td>Duration/ Weeks</td>
<td>1 week</td>
</tr>
<tr>
<td>Actions</td>
<td>Draft Preliminary Project Plan</td>
</tr>
<tr>
<td></td>
<td>Kickstarter Meeting</td>
</tr>
<tr>
<td></td>
<td>Constitute Combined Project Team: roles, communications, expectations.</td>
</tr>
<tr>
<td></td>
<td>Revise Project Plan</td>
</tr>
<tr>
<td>Taproot Foundation Deliverables</td>
<td>Preliminary Project Plan (i.e. All documents in that section of the blueprint)</td>
</tr>
<tr>
<td>Client Deliverables</td>
<td>Competitive audit targets</td>
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<tr>
<td></td>
<td>Stakeholder interview participants</td>
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</table>

<table>
<thead>
<tr>
<th>Stage 2</th>
<th>Discovery &amp; Planning</th>
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</thead>
<tbody>
<tr>
<td>Duration/ Weeks</td>
<td>8 weeks</td>
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<tr>
<td>Actions</td>
<td>Finalize Project Plan; get client approval</td>
</tr>
<tr>
<td></td>
<td>Conduct interviews</td>
</tr>
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<td></td>
<td>Audit competitors</td>
</tr>
<tr>
<td></td>
<td>Prepare and present Findings, Brand Strategy (including 2-3 positioning options)</td>
</tr>
<tr>
<td></td>
<td>Select 1 positioning option for refinement</td>
</tr>
<tr>
<td>Taproot Foundation Deliverables</td>
<td>Project Plan</td>
</tr>
<tr>
<td></td>
<td>Findings Presentation</td>
</tr>
<tr>
<td></td>
<td>Brand Strategy (including 2-3 positioning options)</td>
</tr>
<tr>
<td>Client Deliverables</td>
<td>Availability for interviews</td>
</tr>
<tr>
<td></td>
<td>Quick approval of Project Plan</td>
</tr>
<tr>
<td></td>
<td>Honest and clear feedback on Findings and Brand Strategy</td>
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</table>

<table>
<thead>
<tr>
<th>Stage 3</th>
<th>Draft Revisions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Duration/ Weeks</td>
<td>9 weeks</td>
</tr>
<tr>
<td></td>
<td>Conduct 1 round of revisions to Key Messages and Req. Brief. Present. Gain approval.</td>
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<tr>
<td>Taproot Foundation Deliverables</td>
<td>Brand Strategy</td>
</tr>
<tr>
<td></td>
<td>Key Messages</td>
</tr>
<tr>
<td></td>
<td>Marcom Audit</td>
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<tr>
<td></td>
<td>Req. Brief for Name &amp; Visual Identity (if appropriate)</td>
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<tr>
<td>Client Deliverables</td>
<td>Quick and direct feedback on document drafts.</td>
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<tr>
<td></td>
<td>Approval of final documents</td>
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</table>

<table>
<thead>
<tr>
<th>Stage 4</th>
<th>Delivery</th>
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</thead>
<tbody>
<tr>
<td>Duration/ Weeks</td>
<td>2 weeks</td>
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<tr>
<td>Actions</td>
<td>Write directions for how to use Brand Strategy and Key Messages</td>
</tr>
<tr>
<td></td>
<td>Train Board on Brand Strategy and Key Messages</td>
</tr>
<tr>
<td></td>
<td>Get board approval of Requirements Brief (if appropriate)</td>
</tr>
<tr>
<td>Taproot Foundation Deliverables</td>
<td>Directions for using Brand Strategy and Key Messages</td>
</tr>
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<td>Board training</td>
</tr>
<tr>
<td>Client Deliverables</td>
<td>Board members for training</td>
</tr>
<tr>
<td></td>
<td>Board approval of Requirements Brief (if appropriate)</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Stage 5</th>
<th>Assessment &amp; Closing</th>
</tr>
</thead>
<tbody>
<tr>
<td>Duration/ Weeks</td>
<td>1 week</td>
</tr>
<tr>
<td>Actions</td>
<td>Conduct evaluations</td>
</tr>
<tr>
<td>Taproot Foundation Deliverables</td>
<td>Evaluations</td>
</tr>
<tr>
<td>Client Deliverables</td>
<td>Evaluations</td>
</tr>
</tbody>
</table>

6/11/2014
## Communication Materials and Programs

External and internal communication materials derived from, consistent with, and extensions of the Brand DNA.  
[e.g. brochures, letterhead, signs, Web site, fundraising materials, etc.]
Branding Overview

### Communication Materials and Programs

External and internal communication materials derived from, consistent with, and extensions of the Brand DNA. [e.g. brochures, letterhead, signs, Web site, fundraising materials, etc.]

### Key DNA Identifiers

<table>
<thead>
<tr>
<th>Name</th>
<th>Brand Promise</th>
<th>Visual Imagery</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Word or words that communicate key elements of our Brand DNA</td>
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<td>• Visual image that communicates a key element of our Brand DNA</td>
</tr>
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6/11/2014
## Branding Overview

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### Important Questions

- Who are we?
- Who do we serve?
- How are we different?
- What are our core attributes?
- What is our organization’s personality?
- What is our commitment and role to funders, clients and the community?
Branding Overview

“Give me a lever and I can move the world.” – Archimedes, 2000 years ago

Positioning Statement

- Defines the organization’s uniqueness, differentiation, and relevance
- Is the *lever* to establish the organization’s value and perception to external audiences
- Provides the basis for reputation
- A tool to provide focus and direction when communicating with external audiences
- Different from a tagline
  - Emotion-rich short-hand of the positioning statement
Discovery: Interviews

- The following individuals were interviewed in person and on-site:
  - Jonathan Swain (Executive Director TBC)
  - April Dumars (Youth Director TBC)
  - Father Michael Pfleger (St. Sabina and founder of TBC)
  - Lisa Ramsey (St. Sabina ERC Director)
  - James Miller (Board Chairman TBC)
- Latasha Thomas (Alderman, 17th Ward)
  - Carlos Nelson (Executive Director GADC)
  - Susana Vasquez (Director, LISC)
  - Leo Latz (Fundraising Consulting, LatzBruni Partners)
  - Gerre (Business Assistance Participant, TBC)
  - Latanya (Youth Services Participant, TBC)
  - Jewel (Business Assistance Participant, TBC)

- Interviews covered:
  - Personal experiences and interactions with the organization
  - Effectiveness of the current brand
“Knowledge is a process of piling up facts; wisdom lies in their simplification.”

Dr. Martin Luther King Jr, quoting Martin Fisher, American philosopher, poet and essayist
LINK Unlimited

Mission

• LINK Unlimited provides college preparatory opportunities for economically disadvantaged African American high school youth
  – Integrates mentoring relationships
  – Service initiatives
  – Spiritual principles
• Fosters academic success, personal development, and interracial understanding and harmony
LINK Unlimited

Positioning
• LINK Unlimited provides four-year high school:
  – Scholarships
  – Mentoring
  – Support programming
• Low-income Chicago high school youth who possess **high academic potential** and strong **personal character**

Key Messages
• **High School graduation** and **college acceptance** are early indicators of future success
• LINK Unlimited strives to **transform lives...one student at a time**
Mission

The Chicago Urban League empowers and inspires individuals to reach and exceed their economic potential

The League focuses on growing Chicago's African American workforce and business community
Positioning

• **Advancement** for those who are least advantaged

Key Messages:

• Ensuring that African American **children are well-educated**
  – Equipped for economic self-reliance

• Helping **adults attain economic self-sufficiency**
  – Employment
  – Home ownership
  – Entrepreneurship
  – Wealth accumulation

• Ensuring the **civil rights of African Americans** by eradicating barriers in economic and social mainstream of American life
**Mission**

To make strategic financial and programmatic investments in the Auburn Gresham community.

Perpetuate long-term growth and stability by building upon the experience gained through the community development activities of Saint Sabina.

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**The Beloved Community**

**Logo**

A partner of the faith community of St. Sabina

**Tagline**
Positioning

Creating, promoting and encouraging the links between jobs, homeownership and entrepreneurship.

Key Messages

• Moving community members from dependency to self sufficiency:
  – By encouraging employability among all residents
  – By teaching responsible personal finance
  – By cultivating a culture of entrepreneurship
  – By assisting small business owners
Cluster #1 Summary

St. Sabina and Father Pfleger has been, and will be, a huge positive influence on TBC
• Long history of true transformation
• Viewed as a powerful positive force in the community and with potential donors
• Father Pfleger continues to draw in support and respect
• Is indigenous to the Auburn Gresham community as its Big Brother

Branding implication(s):
• Brand story needs to link back to founding vision and the values birthed in St. Sabina
Cluster #2 Summary

The Beloved Community teaches individuals how to fish
• TBC lends a “hands-up” vs. a “hand-out” to those motivated to learn
• Invests deeply in the individual for life change—casts the net deep
• Is indigenous and focused on the Auburn Gresham community as its Big Brother

Whereas GADC:
• Casts the net wide
• More likely to pass out fish (or hot chocolate)
• Is the “community’s community”
• Works with everybody: the walk-ins, the non-religious
• Works with neighboring communities such as Englewood

Branding implication(s):
• Emphasize that success is not measured simply by the number of people served, but by the way lives are transformed
Cluster #3 Summary

The Beloved Community has huge future, potential impact

• TBC has a passionate and very talented core of leadership on both staff and the Board
• Board has more “heavy hitters”
• Is indigenous and focused on the Auburn Gresham community as its Big Brother
• Political and business connections also help pave the way for big projects

Whereas GADC:

• Also has a highly committed and motivated Executive Director, they may not be as eager to go after the 1 vs. staying with the 99
• Much more of a community representative on Board

Branding implication(s):

• Goals and attitudes of the brand does not have to settle for just programs and services
• Services a higher order of convictions that captures the imagination
Cluster #4 Summary

The Beloved Community is rooted in a long history of past success
• The path has already been blazed and TBC enjoys a running start
• Carries the same ethos that carried St. Sabina for over 20 years
• Recent independent results show impact in the community quickly and without
  a lot of resources–has shown they can take a project and run with it

Whereas GADC:
• Has been around longer
• More patient to see the needle move as they recognize change can be slow

Branding implication(s):
• TBC’s track record along with its “shadow” past record in St. Sabina should be
  dialed up to lend respectability and confidence
Cluster #5 Summary

The Beloved Community services are concentrated along the educational and economic pillars of society
- Economic pillars include business assistance and employment resources
- Educational pillars include youth development
- Not into social services, safety and violence prevention programs
- Does not address health issues
- Does not necessarily bring the community together

Whereas GADC:
- Has a broader reach
- Works with more partner organization to affect change
- Is the one organization that can bring the whole community together

Branding implication(s):
- Easier to be known when offerings are focused and streamlined
- Offers greater expertise in those areas
Cluster #6 Summary

The Beloved Community is helping drive the revitalization effort
• Deep investments in people and infrastructure

Whereas GADC:
• Also drove changed particular as lead agent for NCP

Branding implication(s):
• Promoting Auburn Gresham’s success will also highlight TBC’s success
• Equate Auburn Gresham’s fortunes as “Chicago’s Best Kept Secret” due in part to TBC’s assistance
• “A rising tide lifts all boats”
• Work in conjunction with GADC to publicize the community’s success stories
The Beloved Community
As the Big Brethren next door with a strong tradition of social justice, we invest and lend a helping hand to the lives of individuals and the Auburn Gresham community to build hope and change for generations to come.

GADC
As the beat cop on the street, we bring the community and resources together for a greater Auburn Gresham.
• The Beloved Community, as a strategic community partner vested and invested in realizing the potential of Auburn Gresham, is moved by love and measured by action in building the dream of Dr. King’s “beloved community.” We accomplish this through economic development for the greater community and academic enrichment for our youth to bring life change and hope for generations to come.
The Beloved Community is a strategic community partner in Auburn Gresham, a South Side Chicago neighborhood, which focuses on realizing the economic and educational potential of its residents and members in the surrounding areas. We were founded on the model of Dr. King’s global vision of a “beloved community” in which all people can share in the wealth of the earth. We are driven by love, inclusive by design, and dream of the day where there will be economic and social equality for all.
Communications SWOT

- **Strategic planning tool** used to evaluate organization’s
  - **Strengths**
  - **Weaknesses**
  - **Opportunities**
  - **Threats**

- Identifies internal/external influences on organization
  - Are they favorable/unfavorable?
  - Do they prevent organization from achieving goals?
Communications SWOT

**Strengths**
- Consistent look/feel on signage
- Highlights the vision of Dr. King
- Broad use of media (postcards, Web, newsletters, signage, etc.)
- Personal connection to the founder and to St. Sabina

**Weaknesses**

**Opportunities**

**Threats**
Communications SWOT

Strengths
- Consistent look/feel on signage
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Weaknesses
- Low awareness and visibility
- Not many understand deeper meaning of TBC name
- Scale on the logo is not memorable
- Dark and brooding colors
- “LOVE” may not stand out on black & white

Opportunities

Threats

<table>
<thead>
<tr>
<th>Strengths</th>
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<tbody>
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<th>Opportunities</th>
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<td>• Take advantage of recent formal separation from the church to investigate name and logo direction</td>
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<td>• Develop stronger and more emotional language to engage constituents</td>
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<td>• Establish independent identity to funders and community</td>
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</table>

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<th>Threats</th>
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# Communications SWOT

## Strengths
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- Broad use of media (postcards, Web, newsletters, signage, etc.)
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## Weaknesses
- Low awareness and visibility
- Not many understand deeper meaning of TBC name
- Scale on the logo is not memorable
- Dark and brooding colors
- “LOVE” may not stand out on black & white

## Opportunities
- Take advantage of recent formal separation from the church to investigate name and logo direction
- Develop stronger and more emotional language to engage constituents
- Establish independent identity to funders and community

## Threats
- Does not own “the beloved community” phrase
- Confusing messaging when trying to communicate depth/breadth of services
- TBC is not a “community” but an organization created to develop that community
Only organization in the Auburn Gresham focusing on empowering economic and educational self-sufficiency of its residents and members.

We do this through
• Working with motivated individuals
• Providing a “hand up” (vs. “hand out”) to take them to the next level
• Drives deep, lasting change in their own lives

We are driven by:
• Love
• Inclusive by design
• Relentlessly pursuing economic and social justice
• Dream of the day when there will be equality for all
The Beloved Community does not own “The Beloved Community” in search…

The Beloved Community is the #7 listing on Google— and more importantly, not on the top half of the search finding page.
… or in its own domain names

www.thebelovedcommunity.org

www.belovedcommunity.org

www.belovedcommunitycenter.org
To add more confusion, there is the Beloved Community Christian Church and Beloved Community Family Services in Englewood, the neighborhood next to Auburn Gresham.
Delivering the Message in the Logo

Great names and logos tap into the emotional aspects of our thinking and incite us to respond.

what matters.®

Where all people can share in the wealth of the earth

A mind is a terrible thing to waste.®
We recommend:

• **Investigate** the name
  • Is there another name that can capture the spirit of Dr. King’s vision without referring to it explicitly?
  • Find an ownable proposition

• **Modify** the logo
  • Reflect the brand essence of The Beloved Community
  • Contemporize the graphic elements and color scheme

• **Add** a tagline
  • Sell the benefits of the organization in an emotionally powerful word play
In a word...

COMPETENCE

transforming

embracing

LOVE

highly-committed

Passionate

caring

CHANG

care

concerned

Strategic

high-energy

hard-working

Growing

Vibrant

Intensive

Emerging
Brand Personality

• Based on discovery interview findings and brand statement, Taproot created 4 brand personality options from which to choose
• A brand personality serves as the tone and manner for communicating your message to all stakeholders
Fireman

Personality
• Specialized services
• Intensive
• Longer-term work

Why they care
• Not like “beat cop” who deals with day-to-day problems
• Approaches a problem strategically
• Intensively evaluates a problem
• Develops and executes plan
Fireman

Motto
• Providing long-term solutions to your problems

How would the Fireman talk to AG Residents
• Is honest, upfront about problems in the neighborhood
• Provides possible solutions to problems
• Plans who, what, where, how to solve the problem
• Offers to lead project

How would the Fireman talk to board members
• Understands the problems in the neighborhood
• Works with you to solve them
Nurturing Mother

Personality
- Loving
- Cares about you and wants to see you succeed
- Makes you feel good about your involvement
- Organizing behind the scenes
- Resourceful
- Congenial
- Wants everyone’s experience to make them feel special

Why she cares
- Her job is to make sure everyone has a good, positive experience
- She believes in the mission of TBC
- She likes her neighbors, and cares about their experiences
- She doesn’t want people to leave
Nurturing Mother

Motto
• Self-sustaining and more enriching lives

How would she talk to AG Residents
• Positive experience to this area
• Under its business development program they assisted businesses
  – Perfect Piece
• Established Excellence in Education program
• Brings needed housing and retail opportunities

How would he talk to Board Members
• She really cares about the neighborhood
• She is a project manager, letting them know how to get more involved
Good Samaritan

Personality
• Creative yet sensible
• Plans, designs, knows where to place things

Why he cares
• Wants the area around them to beautiful with solid foundations
• Wants to make environment work efficiently so residents know where to go and how to get there
Good Samaritan

Motto
• Benifiting the entire community

How would he talk to AG Residents
• Focuses our resources on a specific area
• Benefits entire community
• The Perfect Piece, Walgreens

How would he talk to Board Members
• Focuses our resources on a specific area
• Benefits the entire community
• The Perfect Piece, Walgreens.
Optional: The Bull

Personality
- Firebrand preacher
- Activist
- Opinionated and judgmental
- Not afraid to offend people; doesn’t sugar-coat
- Passionate
- Evangelical
- Won’t let you escape until you hear his point
- Takes a stand for what he believes in

Why he cares
- Go-getter
- Deeply cares about the neighborhood
- Wants to see it succeed
- He doesn’t take “no” for an answer
Optional: The Bull

Motto
• Hand up not hand out

How would he talk to Board Members
Residents
• We’ll help, but you take first step
• We are ready to make a change for the better

How would he talk to Board Members
• Aggressive growth goals
• By 2010 increase the number of programs
• Develop an holistic identity apart from St. Sabina
• Increase operating budget over 300% to $3M
• Increase staff 20 full-time staff
## Personality Implications

<table>
<thead>
<tr>
<th>“Fireman”</th>
<th>“Nurturing Mother”</th>
<th>“Good Samaritan”</th>
</tr>
</thead>
<tbody>
<tr>
<td>Saving lives</td>
<td>Loving</td>
<td>Approachability</td>
</tr>
<tr>
<td>Sense of urgency</td>
<td>Care and empathy</td>
<td>Resources</td>
</tr>
<tr>
<td>Whatever it takes</td>
<td>Nurturing</td>
<td>Assists and builds alongside</td>
</tr>
<tr>
<td>“Bringing hope for a better tomorrow.”</td>
<td>“Love is our middle name.”</td>
<td>“Lending a hand to those in demand.”</td>
</tr>
</tbody>
</table>
Key Message Targets

• Key Messages
  – Internal Usage
  – External Usage
  – Donors
Key Message: Internal Usage

Transforming lives by creating and encouraging economic development for the greater community and academic enrichment for our youth which brings life change and hope for generations to come.
Realizing individual and community potential in Auburn Gresham, a south-side community, by promoting economic development for the greater community and academic enrichment for youth, with love, inclusiveness, and economic and social justice—pillars that drive us to pursue the dream of equality for all.
Driven by love and inclusive by design, The Beloved Community relentlessly pursues economic equity for the community, and fosters academic enrichment to prepare our youth for the future.
Proposed Tagline

Realizing Potential
Potential Realized
## Next Steps

<table>
<thead>
<tr>
<th>Milestone</th>
<th>Owner</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Select brand positioning</td>
<td>TBC</td>
<td></td>
</tr>
<tr>
<td>Refine positioning as needed and craft key messages</td>
<td>Taproot</td>
<td></td>
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<tr>
<td>Present revised brand strategy to TBC</td>
<td>Taproot</td>
<td></td>
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<tr>
<td>Present key messages</td>
<td>Taproot</td>
<td></td>
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<tr>
<td>Present/train Board on brand strategy and key messages</td>
<td>Taproot</td>
<td></td>
</tr>
<tr>
<td>Deliver closing, process evaluation</td>
<td>Taproot/TBC</td>
<td></td>
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Appendix: Program Offering Grid