A Guide to Promoting National Standards

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If you have any questions about this Toolkit, contact: nationalstandards@cfstandards.org
With competition from other charitable options and heightened scrutiny of charities in the media, National Standards set our field—and your community foundation—apart and underscore your commitment to integrity, effectiveness and transparency.

Whether you’ve been recently accredited for the first time or reaccredited for the third time, this Toolkit is designed to help you communicate the value of National Standards to donors, professional advisors, grantees and the community at large. Many people will want to know that their local community foundation has been recognized in this way. The accomplishments of a local organization often contribute to a sense of community pride—even for those people who aren’t currently involved with your organization.

In this Toolkit, you’ll find communication strategies, letters, flyers, web and social media content, news releases and other tools that offer a “quick hit” opportunity to highlight your accreditation. Each of these tools is also designed to provide ongoing messaging and examples that can be easily incorporated into your already existing communications. Use these tools—in whole or in part—in whatever way they can best support your community foundation’s needs. Even if you never use these turnkey National Standards tools, you’ll find them helpful as you communicate about the good work being done in your community.

A Brief Review
In 2000, a group of respected community foundation practitioners collaborated with the Council on Foundations to establish National Standards for U.S. Community Foundations™. National Standards assist community foundations in establishing legal, ethical and effective operating practices that show a foundation’s transparency and financial responsibility.

Standards are designed to:
- Demonstrate community foundations’ transparency and financial responsibility
- Guide sound policies and accountable practices
- Distinguish community foundations from other philanthropic vehicles
- Build the capacity of community foundations to carry out their missions
- Assist the field with self-regulation in a manner viewed positively by the Internal Revenue Service

National Standards address six key areas of community foundation operations:

1. **Mission, Structure and Governance**, including standards defining board accountability, compensation, independence, fiduciary responsibility and representation of the community.
2. **Resource Development**, including parameters for administration of funds, disclosures to donors and commitment to building long-term resources for varied community issues and causes.
3. **Stewardship and Accountability**, covering prudent investment and management of funds, transparent record-keeping, use of funds for their intended purpose, annual audits and public availability of financial information, including standards related to due diligence and community responsiveness.
4. **Grantmaking and Community Leadership**, including standards related to broad and open grantmaking programs, due diligence and responsiveness to changing community needs.

5. **Donor Relations**, encompassing guidelines for informing, educating and involving donors in responding to community needs.

6. **Communications**, including openness to public scrutiny and frequent communication about activities and finances.

Thanks to hundreds of community foundations that are leading the way toward greater accountability and transparency, more than two-thirds of the field has been accredited and is displaying the official National Standards Seal that denotes the achievement.

Additional information about National Standards can be found online at cfstandards.org.
Becoming accredited with National Standards for U.S. Community Foundations™ is a significant achievement. Communicating the value of National Standards to your community will increase its awareness of your operational excellence, and provides another opportunity to talk about your foundation.

As with the National Standards Seal, which you can now display freely, National Standards messages can be brought into your existing communications materials. Don’t pass up an opportunity to remind your audiences that you’re an effective, proven and trustworthy partner for their charitable giving. And remember that additional information and compelling stories about the value of National Standards are always available at cfstandards.org.

The tools contained in this Toolkit are listed on the following pages according to the recommended timeline for their use: Before you begin, weeks 1, 2 and 3, and tools for ongoing use. Feel free to use this timeline, or choose a timeline (and the tools) that work best for you. This document has plenty of recommendations, but we ultimately want you to use the tools that will work best for you in the time and manner most appropriate for your organization.

**Overall communication objectives**
- Convey that the community foundation is an excellent way of connecting donors to the causes they care about most
- Increase trust and express a commitment to accountability and transparency in all aspects of operations, financial management, grantmaking, etc.
- Distinguish your community foundation from other charitable vehicles

**Messages**
Messages have been developed to help your staff describe the value of National Standards.

Our accreditation means:
- We meet the highest standards for local giving
- When it comes to doing good in our community, you can trust us
- We take transparency seriously
- Let’s [continue to] work together

**Audiences**
- **Professional advisors:** As the gatekeepers to many high net worth individuals, it is critical that professional advisors be aware of your achievements in quality, integrity and accountability. Advisors will be interested in National Standards as they advise their clients.
- **Existing donors:** Donors will want to know your community foundation is accredited with National Standards. They can be proud that their hard-earned money is being used for maximum impact in their community.
Communication plan, continued

- **Potential donors/community/media:** These audiences may not be familiar with the community foundation and the work you do. National Standards provide an opportunity to create a lasting impression with these audiences.

- **Grantees:** The nonprofit organizations you work with will appreciate the assurance that you meet rigorous National Standards for effective policies and practices in grantmaking. Additionally, other public charities can be reassured that your community foundation is a great place to establish an agency endowed fund for a permanent revenue stream.

- **State and local government officials (especially your State Attorney General):** Government officials may not understand the value a community foundation brings to its local area. National Standards can validate with newly elected and long-term officials your organization’s accountability and community leadership, as well as the commitment of the community foundation field to self-regulation. Your community foundation is an excellent partner in working for the public good.

Communicating these messages consistently requires the work of the entire staff, not simply the effort of a few. All staff should be able to check off the following items:

- ☑ I know about the value of National Standards
- ☑ I am comfortable talking about them
- ☑ I am upholding National Standards through my actions
Shortly after becoming accredited with National Standards, and before sharing the news with your constituents, is a great time to start preparing. These tools will make sure you’re ready to discuss National Standards with any audience.

**Talking points**

First, become familiar with the facts. Your staff and board can use these points to prepare for talking with news reporters, donors and the general public. Talking points help everyone speak consistently about the facts and value of National Standards.

When introducing the talking points to your staff and board, also consider introducing the National Standards communications opportunity by handing them a flyer and local news release.

*NS01_TalkingPoints.pdf*

**Web content**

If a news story, flyer, letter or article sparks someone’s interest, it’s important that you have more information available on your website. Before you start communicating with your external audiences, post the web content to your website.

The headline and leading sentence in the web content can be used as a link from your homepage to another page (e.g., News, About us) containing the full web content.

Use the National Standards Seal on the webpage containing the full story. For recommendations on adding the Seal to your website, please consult the National Seal Guidelines.

*NS02_WebContent.doc*
After you’ve shared your talking points internally, and prepared your website for external communications, you may choose to bring the National Standards message to your networks of donors, grantees, professional advisors, local leaders and the community at large. Using these tools and messages within the first week after receiving your accreditation can help you spread the word.

**Local news release**

Once web content is posted, get the word out to your local media. This release highlights your National Standards accreditation and connects this achievement to donor interests and the value of your community foundation.

Submit this release as soon as possible to help ensure maximum relevance to the community, and don’t forget to follow up with editors and reporters. Also, consider the benefit of including this news release in your basic press kit.

*NS03_LocalRelease.doc*

**Social media content**

Get the word out to your social networks online. Platform-specific material has been developed for Facebook and Twitter, and should be customized as appropriate.

This document also contains general messaging of varying lengths for use on additional platforms or in other communication pieces (e.g., e-blasts, e-newsletters).

You may wish to revisit this document when sharing any blog posts, website content or other stories you’ve developed with the storytelling tool. It can be modified for the purposes of distributing any information to your online networks.

*NS04_SocialMedia.doc*

**Postcard**

A mailing campaign is still a good way to reach some of your community members. Simply customize the contact information and logo, send the files to your local printer and drop these postcards in the mail. Feel free to modify the photograph as well.

*NS05_Postcard.doc*
After you’ve reached out into the community with your messages about National Standards, it can be helpful to reinforce the message with a letter to the editor and communications targeted toward specific audiences. These tools will help you reach out to two audiences: donors and professional advisors.

**Letter to the editor**
Whether your local newspaper prints a story from your news release or not, it won’t hurt to follow up with a letter to the editor. A personal perspective from your CEO may help your message reach additional people, or reinforce the message for those who are already aware.

A couple of days after you send the news release, customize this letter and submit it to the editor of your local newspaper.

*NS06_EditorLetter.doc*

**Donor email**
Quality and accountability are important to donors. They can feel proud that their gifts are handled by good stewards and that they’re partnering to have the maximum positive impact in the community. Build on the confidence your donors have by using this email/letter to reaffirm your demonstrated commitment to integrity and dedication for the causes they care about. You may also wish to include links to any positive coverage from other communication efforts.

Be sure to document any donor responses to this email. Their reactions can be good to include in other materials (e.g., newsletters, press releases). Remember, always ask permission before quoting a donor.

Based on donors’ communications preferences and your access to email addresses, you may choose to format this message as a personal letter on foundation letterhead.

*NS07_DonorEmail.doc*
Advisor email

Standards are important to professional advisors. Their reputation depends on the quality of the advice they give and referrals they make. An email or letter offers a good opportunity to share your message. Regular communications with advisors can help you cultivate important relationships and build trust in the community foundation.

Again, based on professional advisors’ communications preferences and your access to email addresses, you may choose to format this message as a personal letter on foundation letterhead.

NS08_AdvisorEmail.doc
Incorporating the National Standards message into your community foundation newsletter and via selective mailings can help fill in any remaining gaps in your communication, picking up those audience members who may not spend much time online.

**Newsletter article**

Your newsletter is another important way to share your National Standards story. Customize this article with some basic information and use it as a ready-made solution.

If you have received any feedback from donors, advisors or local media, consider highlighting it in your newsletter—use this article and the storytelling template as guides.

*NS09_Newsletter.zip*

**Cover letter, enclosure**

Customize this letter, then copy and paste it onto your community foundation letterhead. Select a subset of donors—those who may be most interested in National Standards, those with whom you have the best relationships, or those you haven’t contacted in a while—and send them a personal letter with an enclosed flyer.

*TIP:* This cover letter can be further modified for mailing flyers to professional advisors, community leaders or other audience members. Simply incorporate some messages from the talking points and repurpose this content.

*NS10_CoverLetter.doc*
These tools are designed for regular, ongoing use. They can be critical components in a short-term communications campaign, of course, but can be turned to for continued use as well.

**Flyers**

Use these flyers to help you target your audience appropriately, whatever the focus. A separate flyer has been included for:

- Current donors
- Professional advisors
- Grantees
- Community members
- Policymakers

In addition to being a handout, the flyers can be enclosed with a cover letter in direct mailings. Together, these materials can offer recipients an “insider’s look” at the National Standards story they will likely hear and read about. Simply import your logo into the production file and paste the letter content onto foundation letterhead.

NS11_FlyerDonor.doc
NS12_FlyerPA.doc
NS13_FlyerGrantee.doc
NS14_FlyerCommunity.doc
NS15_FlyerPolicy.doc

**Storytelling template**

Stories about the good work your community foundation is doing in the local community are important pieces of any communication effort. Use this storytelling template as a guideline for creating compelling stories to include in your newsletter or on your website or blog.

National Standards wants to hear these stories, too. And we want to share them with our national audience. Send your most compelling stories to nationalstandards@cfstandards.org and we’ll post the best ones on our blog.

NS16_StoryTemplate.doc

**TIP:** Don’t forget the ongoing use of your social media platforms. Whenever appropriate, broadcast a portion of the National Standards message to your social networks. Use the Social Media Content tool as an initial guide, then customize the messages for future posts—including any stories developed through the storytelling template—using the guidelines on the following page.
Tools in the Toolkit have been created with Microsoft Word® for easy customization. To make changes, simply select the text you would like to replace and type in your community foundation name, contact information or other content.

Many tools contain yellow highlighting. This treatment is meant to signify an opportunity or need for customization. “Hometown Community Foundation,” for example, is used as a placeholder for your community foundation name and/or logo and is always highlighted yellow. Numbers and statistics provided in these tools are accurate at the time that this Toolkit was released, but are also highlighted yellow. We suggest that all numbers and statistics be verified by your staff. Some updated statistics can be found on the National Standards website at cfstandards.org.

Quotes attributed to Council on Foundations staff or Community Foundations National Standards Board members should not be altered (but may be deleted). All quotes can be used or replaced with quotes from your staff/board/etc. When referring to the Council on Foundations, always use the full name.

Here are a few other general tips for getting the most out of this Toolkit:

- **Incorporate Toolkit messages into already-existing material.** For example, if you’re sending out a year-end update to donors, you may want to cut-and-paste a short paragraph from the social media tool to include at the end of the letter. The talking points and messages in this Toolkit can be adapted and included in your current communications products.

- **Repurpose communications for multiple audiences.** Take a quote from the newsletter article and post it on Facebook. Modify the donor email to include a message tailored to the particular interests of a local business owner. Feel free to use these tools as examples, guidelines and resources when developing communications unique to the needs of your community foundation.

- **Rely on your networks to distribute some material.** For example, use the postcard as an event handout. Consider providing multiple copies of the donor flyer to professional advisors that you already know. After all, if they have flyers on hand when discussing charitable contributions for their clients, they’re more likely to recommend your community foundation.
Now that you’ve been accredited, National Standards is an important part of your community foundation story. Engaging local media effectively will help you share that story with members of your community. Consider these general guidelines when talking about National Standards or other stories with the news media.

Be proactive
- Instead of waiting for the newspaper, magazine, TV station or radio station to call you, be proactive in providing them with accurate information. Talking to reporters is a very good way of educating the public.
- Identify the reporters who write about issues your foundation works in (e.g., education, health). Introduce yourself and let them know that you’re willing to be interviewed and help them with background information. Reporters need help understanding the issues just like anybody else, and they will welcome the opportunity to add local color to their articles.
- When a good story about your foundation comes along, call the reporter and tell him or her about it. Newspapers have an information gap and will be very happy if you help them fill it.

General tips
- If you don’t want something to appear in print, don’t say it. Be careful, because flippant or off-color remarks can damage an interview.
- Spell out all names when talking to a reporter. This will help ensure your name is spelled correctly and can increase the likelihood that you’ll be quoted.
- Be concise. Try to find the shortest way of answering the question. Sound bites are more likely to be quoted than detailed explanations. Try to say what you need to in 30 seconds.
- The foundation world is rife with jargon and acronyms. Avoid them as you will only confuse the reporter and reader.
- Think before you talk. Don’t be so eager that you launch into an explanation without gathering your thoughts. It is okay to pause before answering to help you speak more slowly and articulate better.
- Be yourself. Don’t assume a persona. Use personal pronouns and the active voice.
- Use concrete examples to illustrate abstract topics.
- Reporters like to attribute information to reliable sources. If you know of a report or other reference that answers their question, tell them about it. Give them a name and phone number if possible.
- Be as helpful as you can. If the reporter is confused, the general public will probably be even more confused. It is a good investment of your time to help the reporter understand your field.
Preventing and correcting errors

- At the conclusion of the interview, ask the reporter to verify all of your quotes with you before they appear in print.
- If a newspaper runs an article containing factual errors, call the reporter and ask for a correction. As a last resort, write a letter to the editor correcting the error. Keep the letter short and to the point. Be concrete and direct. Attribute facts to the source.
- Do not repeat an error. Why give it any extra exposure? Just give the context, such as the general question or topic and state the correct answer.
- If a quote was mistakenly attributed to you, think twice before correcting it. Sometimes correcting an error (“I didn’t say that”) is worse than the original error.

Adapted from www.finaid.org, October 2004
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   (b) Maintain its accreditation with National Standards
   (c) Only display the Seal in accordance with the National Seal License Agreement and the National Standards Seal for U.S. Community Foundations Guidelines (“National Seal Guidelines”)
   (d) Submit to the Board a signed copy of the National Seal License Agreement
   (e) Comply with the terms and conditions of this Agreement

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