

# Disseminating Resources to Non-Profits Across Canada

A STUDY OF MARKETING AND COMMUNICATIONS  
STRATEGIES USED BY ORGANIZATIONS THAT  
DISSEMINATE INFORMATION AND THEIR  
EFFECTIVENESS

**By: Talasa Larder**

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A Study of Marketing and Communications Strategies Used by Organizations that  
Disseminate Information and their Effectiveness

Presented to: Kerry Rempel & Kyleen Myrah

**The Scotiabank Center for Non-Profit Excellence**

Okanagan College

Prepared by: Talasa Larder, Student Researcher

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# Abstract

This research is conducted on behalf of the Scotiabank Centre for Non-Profit Excellence in order to determine how non-profit organizations can effectively disseminate training resources to small and medium sized non-profits across Canada. Branding, creating relationships, and social media marketing are elements of marketing that prior research can apply to non-profits that disseminate information. The remaining knowledge gaps on how non-profits find resources, and how to effectively target non-profits via marketing and communications lead to the development of the research objectives for this study. This research is exploratory in nature and uses a qualitative approach by administering interviews over the phone. Ten participating organizations were interviewed using a non-probability sampling method. Analysis of these interviews found that small and medium non-profits find resources through word of mouth, web search, and E-newsletter. Methods that non-profits that disseminate information use to market their services are content marketing, including social media and E-newsletters, events, targeting, branding, and calendars. Key success factors for marketing training resources include quality staff, understanding your target market, and using metrics. E-newsletters are both an effective and cost-effective strategy, and social media and advertising are ranked the most ineffective strategies used by non-profits that disseminate information. Five recommendations are made for SCNPE based on the findings of the research, and are as follows: create a marketing role, plan, utilize content marketing, optimize website for search, and target market research. There are some limitations to this study as it has a small sample size that may not be representative of the population.

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# Chapter 1: Introduction

This research is conducted on the behalf of The Scotiabank Centre for Non-Profit Excellence (SCNPE) in Kelowna B.C. Chapter 1 provides background information on the client and the sector as well as discusses the significance, nature and scope of the research. The research was completed to help SCNPE broaden its reach by developing a marketing strategy.

## 1.1 Background

The Scotiabank Centre for Non-Profit Excellence (SCNPE) enables Okanagan College professors and students to research and identify strategies to ensure sustainability within all realms of Non-Profit organizations. SCNPE began research in 2015, conducting a gap analysis to uncover the areas in the non-profit sector where further education and training were most needed for operational success. This data was used in 2016 to identify resources and develop a curriculum to support sustainability of non-profit organizations in the Central Okanagan. In 2017 SCNPE continued to develop the curriculum as well as conduct more research to identify methods in which non-profit organizations can be encouraged and engaged to participate in training activities and common barriers they face (The Scotiabank Centre for Non-Profit Excellence, 2017).

SCNPE currently, has developed a curriculum, a database of resources, and several training tools, targeted towards non-profit sustainability that are tested and proven. The next step for 2018 will be to administer its resources to non-profit organizations in need. SCNPE's target market is small to medium non-profit organizations that may have little access to resources and funding. Larger organizations are also included as users of SCNPE's resources but because they have greater funding and their own resources, they are not specifically targeted. The problem that SCNPE faces is that smaller organizations are often difficult to identify and communicate with, and there is little information available about them (K. Rempel, Personal Communications, 2017).

The non-profit sector in Canada lacks current data and research. The last national examination of the sector, the "National Survey of Non-profit and Voluntary Organizations", was conducted in 2003, and many other studies do not contain data later than 2007, preceding the recession of 2009 which had a large impact on all sectors in the Canadian economy (Goertzen, 2017).

Non-profit organizations are becoming increasingly competitive for resources. One study states that non-profit executives spend up to half of their time searching for resources. Given these challenges, there is a

need for better understanding of how non-profits like SCNPE can market their resources (Faircloth, 2005).

The desire to promote its resources, and the lack of information on its target market have led the Scotiabank Centre for Non-Profit Excellence to seek help to determine how to effectively market its resources to small and medium non-profit organizations in Canada.

## **1.2 Purpose**

The purpose of this research is to explore marketing in the non-profit sector. The information uncovered from this research will help SCNPE in the development of a marketing and communications plan, so it can effectively disseminate the resources it provides to non-profit organizations in need.

The decision statement is derived from SCNPE's need for primary research to address this issue, and is stated below.

*What marketing and communications methods should the Scotiabank Centre for Non-Profit Excellence employ in order to effectively disseminate its training resources to small and medium non-profit organizations across Canada?*

The following research objectives have been created to provide the information necessary for SCNPE to make the decision identified above.

*RO1: Determine what strategies small and medium sized non-profit organizations use to identify and use training resources.*

*RO2: Identify marketing and communications methods used by non-profit organizations that disseminate information.*

*RO3: Evaluate the perceived effectiveness of marketing and communications methods used by non-profit organizations that disseminate information.*

## **1.3 Significance**

This research will provide SCNPE with the information they need to implement an effective marketing and communications strategy, the goal of which will be to broaden its reach to disseminate resources to non-profit organizations across Canada. This research is significant in not only helping SCNPE but strengthening the non-profit sector. Other training organizations may also find this research relevant and

adopt similar recommendations. The exploratory nature of this research makes it very broad, and transferable to similar contexts.

## **1.4 Nature and Scope**

Following this introductory chapter, Chapter 2 provides the secondary research component of this report that seeks to answer the decision statement as well as identify the research gaps that will be filled by primary research. In Chapter 3, the methodology used to conduct the primary research, including sample design, is described. The data that was collected is analysed in Chapter 4 and in the final chapter, Chapter 5, conclusions are drawn from the research to make recommendations for SCNPE relating back to the initial decision statement.

# Chapter 2: Literature Review

## 2.1 Introduction

The literature shows that there is a knowledge gap for research about non-profit organizations that disseminate information. These organizations are different from other non-profits in that their goals and activities are vastly different, eliminating the need for many of the marketing activities that other non-profits employ. There are some similarities in the strategies that non-profits that disseminate information could employ and find similar success as other non-profit organizations and these methods have been noted for this research.

## 2.2 Definitions

Two key terms must first be defined for the reader to make the most sense of the literature. Those terms are non-profit marketing and dissemination.

### 2.2.1 Non-Profit Marketing

Non-profit marketing functions traditionally are: fundraising, attracting volunteers, creating relationships, and communication. (Nicolau, 2016) This is important to note because the majority of prior research in the literature is focused on these functions. Fundraising and attracting volunteers are two functions that are not as applicable to SCNPE and other organizations that disseminate information. Creating relationships and communication are applicable to this type of organization and will be analysed the most in the literature review.

### 2.2.2 Dissemination

Dissemination as defined by the dictionary is “the act of spreading something, especially information, widely; circulation.” Dissemination is a core aspect of SCNPE’s business operations; SCNPE assists non-profit organizations in their search of training programs by having a database of workshops, seminars and online resources (The Scotiabank Centre for Non-Profit Excellence, 2017). To assist non-profits, SCNPE must spread this information, and spread it widely, to create the most impact.

## **2.3 Non-profit vs. for profit marketing**

Marketing strategy varies from business to business. Researchers have analysed marketing in the for-profit and non-profit sectors to determine whether similar strategies can be employed to have similar effects in different settings.

In Sargaent, Foreman & Mei-Na's (2002) research, the marketing orientation construct's relevance to the non-profit sector is evaluated. The marketing orientation construct is defined as the operationalization of marketing concepts in for-profit organizations and reflects marketing activities in the traditional sense. Marketing elements in the construct are customer focus, competitor focus, employee focus, and profit focus. The research concludes that transferring the construct to the non-profit sector is inappropriate and that a different "societal orientation" should be used for non-profit marketing. The research states that customer, competitor, and employee orientation should not be ignored in non-profit marketing, rather that a societal orientation should be more the focus. This research shows that marketing in the traditional sense is not best approach for non-profit organizations and that non-profit marketing has its own set of rules. (Sargaent, Foreman, & Mei-Na, 2002)

### **2.3.1 Non-profit marketing orientation**

Marketing orientation in the non-profit sector focuses on key stakeholder groups and the needs of wider society (Sargaent, Foreman, & Mei-Na, 2002). It involves coordinating activities for communicating the company's mission, reaching goals, and consistent and targeted messaging to potential customers (Nicolau, 2016).

Research on non-profit marketing orientation shows a trend towards creating brands that not only differentiate from the competition but attract potential donors, volunteers, and provide value to stakeholders (Nicolau, 2016). Non-profits with a higher level of brand orientation have also been found to better influence others in adopting a brand focus, are more adept at translating commitment to the brand into managerial practice and are better able to raise money from voluntary sources (Napoli, 2006).

## **2.4 Finding Resources**

When it comes to activities such as strategic planning, impact reporting, grant writing, board development and governance, it is most often up to the executive director or the board chair to take on these tasks. All these tasks and more often require help and resources that are outside of the director's skill set and thus the resources that SCNPE offers are needed in the non-profit sector. This is a problem that could be

solved by more effective marketing on behalf of the organizations that disseminate information. Therefore the first research objective has been developed as follows:

*RO1: Determine what strategies small and medium sized non-profit organizations use to identify and use training resources.*

## 2.5 Targeting Non-profits via Marketing

One of the major gaps in the literature is the lack of research on how to market resources to non-profit organizations. Some strategies have been identified in popular media that can be considered for this research, but the limitations of the sources should be noted. These three articles outline tips for marketing or selling to non-profits and a theme has been identified in each sources list of strategies that can be found in Table 2.1. The themes identified in the table are saving time and money, networking, authenticity, and value proposition. These are all strategies that SCNPE could consider employing in its marketing strategy; however more research is required. This research gap has let to the creation of the second research objective.

Article Title	Strategies
Do You Sell to Non-profits? 5 Strategies to Start Targeting NPOs	<ol style="list-style-type: none"> <li>1. Focus on the time that they'll save</li> <li>2. Learn more about their finances</li> <li>3. Determine their specific needs and goals</li> <li>4. Become active with local non-profits</li> <li>5. Businesses must be genuine and authentic (Silva, 2017)</li> </ol>
How to Sell Items to Non-Profit Organizations	<ol style="list-style-type: none"> <li>1. Identify your audience</li> <li>2. Get involved</li> <li>3. Focus on benefits</li> <li>4. Stand out</li> <li>5. Close the sale (Wagner, n.d.)</li> </ol>
5 Strategies for Selling to Non-profit Organizations	<ol style="list-style-type: none"> <li>1. Focus on saving them time.</li> <li>2. Be patient.</li> <li>3. Network, network, network.</li> <li>4. Make your value proposition clear.</li> <li>5. Stay genuine (Wong, 2016)</li> </ol>

**Table 2.1 – Tips for selling to non-profits in popular media**

*RO2: Identify marketing and communications methods used by non-profit organizations that disseminate information.*

In formal research, three other themes have been identified that may be effective methods for SCNPE to utilize; branding, creating relationships, and social media.

### 2.5.1 Branding

In previous research, brand orientation has been identified to correlate with success in the non-profit sector. Napoli (2006) defines non-profit brand orientation as the organization-wide process of generating and sustaining a shared sense of brand meaning that provides superior value to stakeholders and superior performance to the organization. Non-profit brand orientation entails putting the brand at the centre of an

organization's decision-making process and focusing on the internal and external activities necessary to build and sustain a strong brand.

Napoli (2006) was able to identify that organizations classified as high performers considered themselves to be effective brand managers, using many of the elements of non-profit brand orientation. The organizations that classified as low performers considered themselves poor brand managers. This research tells us that non-profit brand orientation is an important tool that SCNPE should utilize.

Three elements of non-profit brand orientation create good organizational performance. These elements are orchestration, interaction, and affect. Orchestration is the process of implementing integrated marketing activities that deliver consistent brand messages to internal and external stakeholders. It also creates a brand portfolio that is understood by staff. Interaction is the degree to which an organization utilizes feedback to improve and create value. The last element, affect, measures whether an organization understands the attitudes and feelings of its stakeholders, and what they like and dislike about the brand (Napoli, 2006). These are all elements that SCNPE should take into consideration when developing its brand.

### **2.5.2 Creating Relationships**

Orientation towards creating relationships with key stakeholder groups has been identified in the literature as a very important aspect of non-profit marketing. Different stakeholders and partnerships offer non-profits advantages in innovation, supply chain reach, service delivery, and financial support; but they also present a unique array of challenges (Tsarenko & Simpson, 2017). In terms of human resource management, it is also important to balance board, staff, volunteers, and community stakeholders; and demonstrate that the organization is accountable to these publics (Debra, 2010).

Many relationships between organizations are not managed like business-to-business (B2B) partnerships when they arguably can and should be. Organizations must overcome cultural differences, build trust, and align their short and long-term interests if they wish to create meaningful relationships (Tsarenko & Simpson, 2017). SCNPE's target market is other non-profit organizations; therefore a focus on cross-organizational relationships will be an important factor.

In the business of online services, like the training resources that SCNPE provides through its website, an element of trust in the relationship is crucial. It may go without saying that trust is central to most significant relationships. However, the need for trust increases when focusing on relationships between service organizations and their customers and is magnified further when looking at those relationships in

an online context (Mills & Plangger, 2015). Another factor to consider about branding, is that the brand conveys security and performance in the best interests of the clients. Mills & Plangger (2015) suggest that social media provide both the opportunity and the arena, online, of enabling online service firms to build and enhance brand trust and relationships.

### **2.5.3 Social Media Marketing**

Mills and Plangger (2015) suggest that online service brands consider social media not as an extension of a website, but as a separate component of marketing initiatives related to customer relationship management. Social media allows for two-way communication, which can help a brand develop rapport with its customers, but it should also be noted that an organization should be aware that they can't control what customers say about them online (Mills & Plangger, 2015).

Research suggests that almost two-thirds of social media users learn about brands and services on social media, and that 17% feel more connected to brands they've seen online. Mills & Plangger quote this research finding from 2012; since social media has penetrated a higher percentage of users in the last five years it is expected that these numbers have increased. Research on social media at the organizational level has not grown rapidly (Lovejoy & Saxton, 2012).

## **2.6 Effectiveness**

There are no pre-existing benchmarks identified in the literature as to what makes an effective marketing strategy in this context, which has led to the creation of the third research objective:

*RO3: Evaluate the perceived effectiveness of marketing and communications methods used by non-profit organizations that disseminate information.*

## **2.7 Conclusion**

Elements of marketing orientation, branding, creating relationships, and social media can help SCNPE with its decision to employ marketing and communications methods in order to effectively disseminate its resources to small and medium non-profit organizations.

Gaps in the research surrounding how non-profits find resources, how to target non-profits in marketing, and marketing methods used by organizations that disseminate information, have been identified and have led to the development of the following research objectives:

*RO1: Determine what strategies small and medium sized non-profit organizations use to identify and use training resources.*

*RO2: Identify marketing and communications methods used by non-profit organizations that disseminate information.*

*RO3: Evaluate the perceived effectiveness of marketing and communications methods used by non-profit organizations that disseminate information.*

The next chapter, Chapter 3 the methodology that will be used to conduct the primary research to address these research objectives is discussed.

# Chapter 3: Methodology

## 3.1 Introduction

This chapter explains how the research was designed to fit the research objectives. It describes the sampling and data collection methods used to collect the primary research portion of this report. It also discusses instrument evaluation and provides the framework of analysis used to interpret the data in the following chapters.

## 3.2 Research Design

As discussed in the literature review, there is little information available about marketing such a niche service. For this reason, the research is exploratory in nature. A qualitative research method is more appropriate to explore the topic and gather as much in-depth information as possible. A qualitative method will allow for certain insight and experience to be collected from the sample that would not be possible through survey research. Because it is a niche service lots of probing and clarification will be required to get the right information from participants.

## 3.3 Sample Design

The population of interest is all non-profit and for-profit organizations that disseminate information to non-profits across Canada. The sample consists of ten non-profit organizations. For exploratory research this is an appropriate sample size as the focus is more on collecting in depth information and experience which would likely become repetitive after more than ten interviews. A nonprobability sampling method was to purposely select respondents that fit certain criteria. The sample was selected by the interviewer based their ability to meet the following criteria:

- Has been established for more than 3 years.
- Disseminates information to other non-profit organizations.
- Has an observable marketing strategy.

The purpose of this method is to ensure that respondents are of similar nature to SCNPE so that the data collected can be used to make recommendations that SCNPE is able to implement. This research is at the organizational level, therefore the unit of analysis is the organizations that take part in the interviews. Executive directors, CEO's, and Marketing Directors/Coordinators will answer the interview questions on the organizations' behalf.

### **3.4 Data Collection Methods**

The data was collected through individual interviews over the phone. Ten interviews took place for the research. Participants were asked a total of nineteen questions; these questions can be found in Appendix A. The first seven questions are demographic type questions and the remaining questions pertain to their respective research objectives. The last question of the interview asks participants if there is anything else they would like to add to ensure time to reflect and ensure all relevant information has been provided. On average the interviews took 25 minutes to complete. The student researcher recorded the data collected during the interviews by taking notes in a word document as well as using a phone call recording application to ensure that nothing was missed or misinterpreted.

### **3.5 Instrument Evaluation**

Reliability and validity are difficult to measure in qualitative research due to its open-ended nature and difference in human reaction. A measure is reliable when different attempts at measuring something converge on the same result (Zikmund, Babin & Carr, 2013). Statistical testing is not used in this research due to its small sample size, qualitative and exploratory nature. For this research multiple questions are asked for each research objective in order to frame the concepts differently and gain different perspectives. This method works on an individual basis to ensure participants converge on consistent responses to the objectives. The student researcher is the only person conducting the interviews and follows the same structure for each participant to ensure consistency and reliability. The sample and interview questions have been chosen carefully to ensure that the data collected will directly relate to the research objectives to ensure valid responses are captured.

### **3.6 Analysis**

Seven demographic questions are asked at the beginning of the interview and are used to segment and compare respondent's answers. Aside from these questions the majority of the data set consists of string variables (responses to open-ended questions). These variables are analysed by coding the responses for repeating words, concepts, and themes. For further analysis of the data, concepts from Chapter 2 are revisited to compare.

Similarities are noted and used to make recommendations to the client about best practices when it comes to marketing and communications strategies in Chapter 5.

### **3.7 Conclusion**

In conclusion, a qualitative method is used to conduct this exploratory research. Interviews were conducted with a sample of ten organizations that disseminate information. This sample was chosen using a non-probability sampling method to select a sample most appropriate for the study. Grouping and text analysis will be used to interpret the data as accurately as possible and the analysis will be used to make recommendations to the client. The next chapter, Chapter 4 will provide the analysis of the data.

# Chapter 4: Findings and Discussion

## 4.1 Introduction

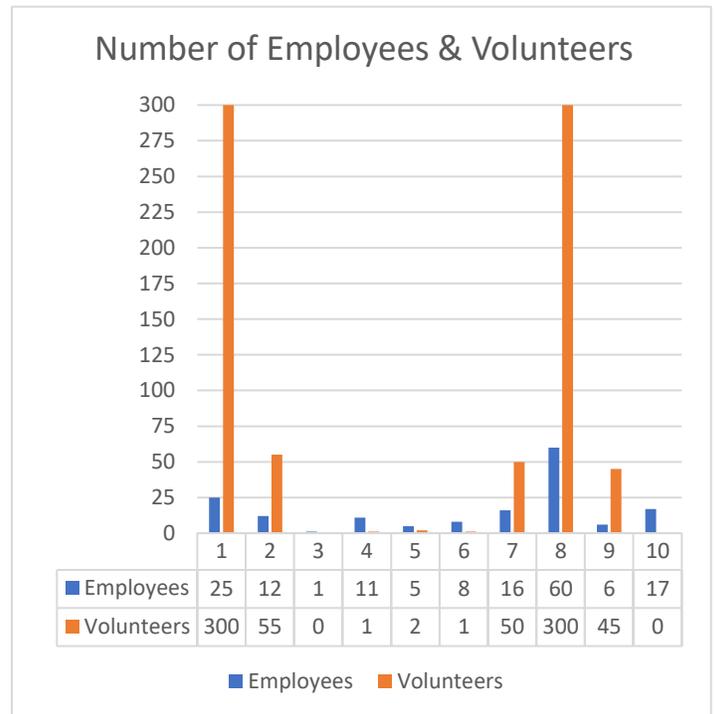
Primary research for this report was collected via interviews over the phone using the methodology presented in Chapter 3. In this chapter the interview participants are described and the data that was collected is presented in the order of the research objectives. The conclusion at the end of this chapter summarizes the key findings and the following Chapter 5 uses these findings to further draw conclusions and make recommendations.

## 4.2 Participants

Ten organizations participated in the study that ranged in size and scope. The criteria for choosing participants did not exclude organizations based on their business models; therefore, a mix of non-profit, for profit, and charities participated. Of the ten participants, there were four charities, four non-profits, and two for profits. There was some overlap, however, as some of the non-profits noted that they also had a registered charity number.

Demographic questions were asked to determine size and scope of each participating organization. Factors like number of employees, number of volunteers, geographical reach, and budget were taken into consideration to group organizations. The number of employees ranges from 1 - 60 and the number of volunteers ranges from 0 - 300 as seen in Figure 4.1 Using the number of employees and the number of volunteers, organizations can be grouped by size into three groups: small, medium, and large organizations. Participants 1 and 8 are large. Participants 2,7, and 9 are medium, and the remaining (3, 4, 5, 6, and 10) are small.

Geographical reach is also used to group respondents. Organizations were asked if they serve the local,



**Figure 4.1 – Number of Employees & Volunteers**

provincial, or national market. Of the ten respondents, two operate at a national scope, four at the provincial, and four at the local level.

Of the ten organizations interviewed, seven disclosed that they did have an allocated marketing budget; however, only four of them disclosed how much per year they spend on marketing. These budgets ranged from \$5,000 to \$230,000, although it was not defined what expenses would be included in the budget so this is not an accurate grouping variable.

**4.2.1 Non-Responses**

Many of the organizations who declined to take part in the interview provided some insight into the sector in their responses. Approximately 30 organizations were contacted and only 10 resulted in responses. Of the non-responses, most were true non-responders as they never replied to the email or voice message that requested their response. However, some of them did reply but only to refuse to take part. Of the refusals, three noted that they were refusing because their organization did not have a marketing strategy. This only adds to the importance that the outcomes of this research will provide to the sector. The goal of this research is to provide more information about how to market to non-profits, with more information available perhaps SCNPE can help strengthen the sector in this department.

**4.3. RO1: Determine what strategies small and medium sized non-profit organizations use to identify and use training resources.**

Organizations were asked how primarily non-profits find out about the training services they offer. Each respondent offered multiple methods by which new clients identify and use their training resources and a summary of the methods can be

seen in Table 4.1. Each respondent identified 2 to 4 methods, with the exception of respondent 9 who was unsure. The most common methods were word of mouth, e-newsletters, and web search.

Respondents were also asked how they themselves identify training resources. Only nine

How do clients find out about the services you offer?											
	1	2	3	4	5	6	7	8	9	10	Total
Web Search		✓	✓		✓	✓		✓		✓	7
E-Newsletter	✓	✓	✓			✓	✓	✓			6
Word of Mouth	✓			✓	✓		✓			✓	5
Social Media						✓		✓			2
Events	✓			✓							2
Direct Mail	✓										1
Referrals		✓									1
Flyers					✓						1
Webinars										✓	1

**Table 4.1 – How Clients Find Resources**

participants responded to this question, the other responded that so many training opportunities present themselves to them that they don't have to look for training resources. Many had access to in-house resources, as training was an integral part of their business. Others had connections in the sector that they often used as a resource. Only one of the respondents used SCNPE as a training resource. Three organizations said they used Google to search for training resources, and three said they heard about them through word of mouth; only one participant talked about finding them through e-newsletters. Others had one or two training websites that they used regularly, such as Imagine Canada and Charity Village. A detailed list of all the training resource organizations and sites that were mentioned by the respondents during the interviews is provided in Appendix B.

#### **4.4 RO2: Identify marketing and communications methods used by non-profit organizations that disseminate information.**

Each respondent was asked to describe the organization's marketing strategy and communications plans. Many themes among organizations arose in the interviews.. For marketing strategy, the themes that arose were content marketing, social media, E-newsletters and events. Six participants mentioned that they had some sort of communications plan in place. Of the six responses three key themes surfaced in communications; targeting, branding, and the use of calendars.

##### **4.4.1 Content Marketing**

Every organization interviewed mentioned doing some form of content marketing. Social media, websites, and e-newsletters provide online platforms for sharing content, but it is important to note the kind of content that participants are sharing, and how they are using this to benefit their marketing strategy. As one organization put it "Our marketing strategy is not to promote [our brand], but to strengthen the Non-Profit sector." Many of the organizations followed this sort of mantra when it comes to content marketing, as not all of the content shared is their own. Often it is external links, helpful resources, toolkits, research papers, job postings, and more. Organizations are using this free content to engage their audiences before asking them to use their services. Many of the organizations mentioned publishing stories, hosting webinars, and posting podcasts on third party sites. This helps them first establish a trust relationship and then direct a call of action at the end to check out their own site. One respondent mentioned that the majority of new clients are acquired from the webinars they host on third party sites. Participants are also using similar tactics offline by delivering free small-scale presentations at events and partnering organizations. One participant referred to this type of content marketing as "the opportunity to build a relationship and demonstrate expertise before trying to sell them something" which they found to be a valuable asset.

#### 4.4.2 Social media

Five social media platforms were mentioned by respondents, those platforms are Facebook, Twitter, LinkedIn, Instagram, and Snapchat. Table 4.2 provides the frequency by which each platform was used by the ten respondents in their marketing strategies. Facebook and LinkedIn were the most common platforms, used by 7 organizations, followed by Twitter, used by 6. Instagram and Snapchat were each used by 1 organization.

Social Media Platforms											
	1	2	3	4	5	6	7	8	9	10	Total
Facebook	✓	✓		✓		✓	✓	✓	✓		7
Twitter	✓			✓			✓	✓	✓	✓	6
LinkedIn	✓		✓	✓			✓	✓	✓	✓	7
Instagram		✓									1
Snapchat	✓										1

**Table 4.2 – Most Common Social Media Platforms**

Facebook and Twitter were both popular for content marketing, sharing useful content, as well as promoting upcoming events. One organization mentioned using the testimonials feature on Facebook as a way to engage new clients. Two of the ten participants mentioned that they have used Facebook for advertising campaigns.

Of the participants using LinkedIn, many of them expressed how useful it is for developing their B2B professional networks. One organization has started its own professional network using LinkedIn Groups to reach its target market, where it can post content on a regular basis. They post primarily external links, useful content and job opportunities.

Snapchat was only mentioned by the one organizations that uses it, and it was not elaborated on. Other organizations however commented that Instagram was not for them because they are not a visual organization and the messages that they are trying to get across are too complex to be summed up by pictures.

#### 4.4.3 E-Newsletters

E-newsletters was a very popular and highly regarded tool used among the participants. Of the participants 9 of 10 used E-newsletters to communicate with stakeholders. One organization prepares its E-newsletter in the following fashion:

*It gleans information that's pertinent to the non-profit sector. Highlighting things we believe are of the most importance and in the best interest of our target market. It highlights what [our organization] is doing, employment opportunities, how to segments, funding sources and where to apply for grants. There's a housing section, a local info section, research section, resources*

*and toolkits, social media and tech, training offered in the area, and volunteerism. In between newsletters if there's something time sensitive it goes out in a separate e-mail blast; selectively. We don't want to be bombarding people with information.*

The commonality of E-newsletters used by participants in this research should be heavily noted. Many of the participants who mentioned using E-newsletters did so more than once. One organization even relied on E-newsletters as the basis of its marketing strategy, which shows how impactful this tool can be.

#### **4.4.4 Events**

Of the respondents, six discussed events as being closely tied to their marketing strategy, and the timing of marketing activities throughout the year. Two respondents mentioned attending numerous events to set up a booth as a good way to engage with their local target markets. The other four respondents referred to much of their marketing resources going towards promoting their own events.

#### **4.4.5 Targeting**

Segmenting and targeting were mentioned as useful communications tools by two organizations, although knowing your audience was mentioned by a few more. One of the organizations explains how they use segmenting and targeting to achieve communications objectives in the following quote:

*Once we have people in the database we look at them and try to target what we offer to their demographic, mostly through targeted emails. We generate content that applies to them, we're about generating helpful resources for people by understanding their needs. Through that we work them down the funnel to hope that they come to one of our events or engage more with us on a deeper level rather than just on our website.*

Another organization discussed the importance of reaching its target audience stating that “every time I try something new and go outside my target audience I fail.” Segmenting and targeting were discussed as important tools for getting the right information to the right people. It was also useful for one organization to ensure that useless information did not go to unintended audiences resulting in information overload.

#### **4.4.6 Branding**

Branding was mentioned by three organizations as part of their communications plans. One organization has established brand guidelines for messaging, where everything is reviewed for brand voice. Another mentions that branding is used to ensure consistent messaging across all channels of communication.

#### **4.4.7 Calendars**

One participant described its communications strategy as an ecosystem that consists of a shared online calendar that tracks, monthly newsletters, social media posts, and is where all marketing activities are clearly mapped out to align with upcoming events. Four organizations mentioned using calendars to strategically plan their marketing and communication in this way.

#### **4.4.8 Key Success Factors**

Participants were asked what they would identify as key success factors for marketing to Non-Profit Organizations. Three main themes surfaced as common key success factors among the participants; staff, target market, and metrics.

Four organizations mention staff as being a key success factor, stating that having a position in the organization that dedicates a person to managing marketing activities is key to their marketing success. Two organizations mentioned having the right people and processes in place. One organization said ensuring their team of staff are all on the same page, across departments was also key.

Knowing your target market also surfaced as a theme in the key success factors. Target market and audience were mentioned by seven of the organizations. In addition to knowing your audience, organizations also talked about how using a combination of strategies to reach their markets, such as developing customer personas, engaging and responding with two-way communication, and targeting and excluding different markets with different messages.

Metrics were mentioned by two organizations. Paying attention to online metrics and tweaking their campaigns in accordance were noted to be key success factors. For a full list of all the key success factors mentioned by interviewees see Appendix C.

### **4.5 RO3: Evaluate the effectiveness of marketing and communications methods used by non-profit organizations who disseminate information**

In addition to asking participants what sort of marketing and communications tactics they use, they were asked how effective they perceive their strategy to be. Questions asked for this research objective were what are the most effective, least effective, and most cost-effective tools used. Participants were also asked to rank their overall strategy.

Table 4.3 displays each participant’s answers to which marketing tools are the most effective, least effective, and cost effective. There is a lot of overlap in answers for most effective and cost effective. Five respondents report that their most effective strategies are also their most cost effective. Email and E-Newsletters are mentioned several times both as effective and cost effective. Social media is mentioned four times in the least effective responses, and advertising is mentioned three times.

Participants were asked to rank how the overall effectiveness of their organizations marketing strategy on a scale of 1 to 10 with 1 being extremely ineffective and 10 being extremely effective. When asked to rank their organizations’ overall strategies, participants responded with a mean ranking of 6.75 which is only somewhat effective. Rankings ranged from 4 to 8. Mean rankings can be compared by type of respondent. Table 4.4 shows the mean rankings for each organization type, size, and geographical scope. There is little deviation from the overall mean of 6.75. In every case, participants who answered this question with low scores stated that they were doing a good job of marketing their services, but felt that there was much room for improvements, to justify the low score.

## 4.6 Conclusion

Ten respondents participated in this primary research, all with varying business models, size, and geographical scope. Key findings of this research are that the most common methods non-profits use to find training services are word of mouth, e-newsletters, and web search. Of the participants there were

	Most Effective	Least Effective	Cost Effective
1	Email	Social media (Pinterest and Google Plus) and Banner Ads	Direct Marketing, E-newsletter, One-on-one at events
2	Content Marketing	Print Media and Social Media	Email Marketing
3	E-Newsletters	Reaching outside the target market	E-Newsletters
4	Presentations	Advertising	Presentations
5	Networking	Social media and Facebook Ads	
6			Email Marketing and Twitter
7	Content Management Calendar	Instagram and LinkedIn	E-Newsletter
8	Social Media, Database Marketing, Posters	Newspaper Column	Social Media
9	Website	Advertising	Website
10	Email Marketing	Over Emailing	Webinars

**Table 4.3 – Effectiveness of Marketing Strategies**

Mean Ratings	
Segment	Mean
<b>Business Model</b>	
Charity (3)	6.875
For Profit (2)	6.75
Non-Profit (5)	6.625
<b>Size</b>	
Large (2)	6.75
Medium (3)	6
Small (5)	7.2
<b>Geographical Scope</b>	
Local (5)	6
Provincial (3)	7.83
National (2)	7

**Table 4.4 – Mean Ratings of Effectiveness**

many similarities in marketing strategy, including the importance of content marketing. E-newsletters and social media are regarded as important platforms for delivering content. The most used social media platforms are Facebook, LinkedIn, and Twitter. Common communications plans include guidelines for segmenting and targeting, branding, and many organizations use a calendar to plan communications and tie it to events that are happening. Respondents rank the effectiveness of their organization's marketing strategy on average 6.75 out of 10.

In the next chapter, Chapter 5, these findings will be used draw conclusions and make recommendations.

# Chapter 5: Conclusions and Recommendations

## 5.1 Introduction

This chapter uses the literature review and the findings discussed in Chapter 4 to draw conclusions about the research objectives and decision statement. Recommendations are made for SCNPE based on the findings and limitations are discussed.

## 5.2 Conclusions about research objectives

*RO1: Determine what strategies small and medium sized non-profit organizations use to identify and use training resources.*

Small and medium sized non-profits identify training resources using three main methods; word of mouth, E-newsletters, and web search. The results of the interviews identified these three methods as the most common ways that their clients, most of whom are small and medium sized non-profits, find out about training services.

*RO2: Identify marketing and communications methods used by non-profit organizations that disseminate information.*

Non-profit organizations use a variety of methods to disseminate information. The literature review identifies that traditional marketing does not work in a non-profit setting and that rather a societal orientation is necessary. To achieve this, prior research suggests three methods that non-profits should incorporate in their marketing strategy; branding, creating relationships, and social media marketing. The results of this study found that content marketing, including E-newsletters and social media, and branding are common methods used. Branding, as stated in the literature, is comprised of three elements; orchestration, interaction, and affect. It involves delivering consistent brand messaging, ensuring branding is understood by staff, utilizing feedback to improve, and understanding what its stakeholders like and dislike about the brand. While only three participants discussed branding in the interviews, elements of branding resurfaced when key success factors were discussed. Participants mentioned that ensuring staff are on the same page, understanding stakeholders and utilizing metrics, a form of feedback to make improvements, were key to their marketing success, both elements of branding as discussed in the literature.

Word of mouth, networking, and building relationships are an important method that non-profits use for disseminating information. The literature identifies trust as an integral part of building relationships. Content marketing provides an opportunity to build trust and establish a relationship. Every organization interviewed used content marketing in some capacity as part of its marketing strategy.

Social media was one form of content marketing discussed. The most common social media platforms used by participants are Facebook, LinkedIn, and Twitter. Social media allows for two-way communication, which is identified as a key success factor, to develop brand and establish rapport with clients. However, participants in this research believe that social media is not a very effective tool. E-newsletters, are being used by the majority of non-profits that disseminate information and are highly regarded as an effective tool.

Segmenting and targeting are methods that non-profits use to ensure the right messages are getting to the right people at the right time. Participants say understanding your target market is key for marketing to non-profits.

Many organizations plan their communications using a calendar to map out marketing activities throughout the year. Attending and hosting events are common, and non-profits often tie their marketing timelines to events that are happening.

*RO3: Evaluate the perceived effectiveness of marketing and communications methods used by non-profit organizations that disseminate information.*

According to the interviews, non-profit organizations that disseminate information perceive the effectiveness of their marketing strategies to be an average of 6.75 out of 10. E-newsletters are an effective and cost-effective strategy used by non-profits. According to participants, social media and advertising are not effective strategies.

### **5.3 Conclusions about Decision Statement & Recommendations**

The decision statement developed at the beginning of the research process asks the following:

*What marketing and communications methods should the Scotiabank Centre for Non-Profit Excellence employ in order to effectively disseminate its resources to small and medium non-profit organizations.*

The following recommendations answer the decision statement by stating what marketing and communications methods SCNPE should use to effectively disseminate its resources. The recommendations are supported by the conclusions drawn above from the literature and findings from the primary research.

**Recommendations:**

1. Create a Marketing Role

SCNPE should allocate a staff member or volunteer to be held accountable for maintaining marketing activities.

2. Plan

SCNPE should create a marketing calendar each year of all the marketing activities to take place throughout the year for staff and volunteers to stick to. This plan should include branding guidelines to ensure consistency of brand voice. The timeline should be planned around events SCNPE is participating in and hosting.

3. Content Marketing

SCNPE should begin an E-newsletter for marketing content.. E-newsletters are discussed in every research objective. They are one of the top methods non-profits use to find resources, they are used by most non-profits to disseminate information, and they are rated as one of the most effective and cost-effective marketing tools. SCNPE should be well advised to implement an E-newsletter that current and potential clients can opt-in via its website.

4. Search Engine Optimization

SCNPE should optimize its website content for search engines. Web search is one of the most common tools that non-profits use to identify resources. If SCNPE does not appear on search engine results pages they could be missing out on potential web traffic and new clients.

5. Target Market Research

Understanding your target market is key for non-profits that disseminate information. SCNPE should ensure it has an extensive knowledge of its target market before implementing any of these strategies outside of the Okanagan. Further research may be required to ensure a full understanding.

## **5.4 Limitations**

It is important to note the limitations of the primary research conducted for this research. As an exploratory study a qualitative approach was used, and due to the capacity of the student researcher only ten interviews were conducted. These ten participants' responses may not be representative of the entire population. It is impossible to measure the statistical significance of the data collected in this research due to its small sample size.

## **5.6 Conclusion**

As the Scotiabank Centre for Non-Profit Excellence embarks in 2018 to expand its reach and market its training resources to small and medium non-profit organizations across Canada, this research can provide a useful guide of recommendations. If SCNPE creates a marketing role within its organization, plans effectively, utilizes content marketing and search optimization, and does some target market research, it can expect to effectively market and disseminate its resources.

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# Appendix A: Interview Questions

1. What is your corporate structure?
  - a. Non-Profit
  - b. Charity
  - c. Foundation
  - d. For Profit
2. How many employees work for your organization?
3. How many volunteers work for your organization on a regular basis?
4. What geographical reach does your organization serve?
  - A. Local
  - B. Provincial
  - C. National
5. What type of training services do you offer?
6. Does your organization have an allocated marketing budget to promote these services?
7. How much each year does your organization spend on marketing these services?
8. How do your clients find out about the services you offer?
9. Please describe your organizations marketing strategy
10. Please describe your organizations communications plan
11. Who decides on these strategies and evaluates them/keeps them up to date?
12. Do you do any preliminary research before implementing new strategies? If so what kinds?
13. What would you say are some key success factors of marketing your services and why?
14. What would you say is the most effective marketing tool used by your organization and why?
15. What would you say is the least effective and why?
16. Which one is the most cost effective/gives you the best return on investment/bang for your buck?
17. How would you rate the overall effectiveness of your marketing strategy (1-10)? With 1 being extremely ineffective and 10 being extremely effective.
18. Where does your organization go to look for training resources?
19. Is there anything else you'd like to add?

## Appendix B: Training Resources

This is a list of organizations and websites interviewees use when they need to identify training resources.

- Institute of corporate directors
- Vantage point
- Non-assistance Fund
- Center for Innovation Content Institute
- Volunteer Canada
- Imagine Canada
- Charity village
- Lynda.com
- Hubspot
- Nonprofitmarketingguide.com
- Board Source
- Net Squared
- Skill Share

## Appendix C: Key Success Factors

This is a list of all of the respondents' (concise) answers to the Key Success Factors question.

- Planning, clarity of goals, articulation, having a budget and or hr, ensuring message is clear for audience.
- Understand audience, don't use negative language, focus on client experience not promoting us.
- Focus on the market, develop personas.
- The opportunity to build a relationship and demonstrate expertise before trying to sell them something.
- Knowing our market. Combination of strategies/platforms to reach different markets.
- Understand your audience, engage and respond, make it two-way, look carefully at your metrics.
- Having a position in the organization, having the processes in place, having the right tools, make sure everything is integrated.
- Consistency, responsible staff, branding, dependability.
- Being resourceful, building efficiencies, repurposing content, having a plan/calendar, getting the right message right time to right people, understand your market.
- Team on same page, processes in place, looking at metrics and tweaking, open, adaptable to respond, coordinating efforts, targeting and exclusions, merit based content, webinars similar to events happening soon.