

DRIVING PARTICIPATION

WITH BETH BRODOVSKY

SESSION 124

INTRODUCING A THEME FOR YOUR ANNUAL REPORT

WITH MARLENE OLIVEIRA

BETH: Hello, this is Beth Brodovsky, and welcome to Driving Participation. Today I am on with Marlene Oliveira. Marlene is a copywriter and a communications consultant, and she's been doing a lot of interesting things with annual reports lately and we haven't really talked about annual reports on the podcast so I thought this would be a perfect time to have her on to begin talking about what a nonprofit can actually do with an annual report. Marlene, thanks so much for joining me today.

MARLENE: Thank you so much for having me.

BETH: I'm thrilled to have yet another representative from Canada on to join us today especially since we're recording while the Olympics are still going on. How did you end up wandering into this work that you do?

MARLENE: Well, I have worked in the nonprofit sector my entire career. My first job was at a local branch of a nonprofit and I spent several years as a national communications manager for a large health organization, and so when I decided to leave that organization and that role, I really enjoyed both of them and I really wanted to do something different. I wanted to explore my entrepreneurial side, but at the same time I was pretty loyal to nonprofits. So I flipped the switch. I was on the other side. I was working from home and I started to focus in on nonprofits with their content. I really focused in on copywriting. Over the eight years since I launched my business, I've dabbled a little bit outside of the sector, and I always came home. So for the last several years I've just acknowledged that nonprofit communicators, they're who I know. Most of my friends are nonprofit communicators. Certainly all of my clients are, and that's just who I want to serve. So that's what led me here.





DRIVING PARTICIPATION

WITH BETH BRODOVSKY

BETH: It's so funny. I had a very similar type of a path. I worked for a nonprofit and when I left there, I was like, "Ugh, I gotta get out of this," and it just kept showing up and showing up and I finally realized not only was it showing up, that was the work I was really enjoying, and it wasn't even just the work. It was the people I was really enjoying. I just felt more valued as a contributor to the work when we were working with nonprofits. People always ask, "Why do you do it?" and I'm like, "You don't understand. Come over. They're so much nicer."

MARLENE: Absolutely, and as someone who works with content, it's so much more rewarding and interesting for me to write about the issues and the information when it's what nonprofits are doing. It's just so much more interesting for me.

BETH: I can totally understand that because before we really focused, we had a lot of projects from the weirdest sector, things like I didn't know somebody did that, people made clocks for schools. Stuff like that, but OK. Now I mean, personally I love that. My father made coin wrappers so I love the weird nerdy things that people make their living doing in the world, but from a work perspective, focusing on this, I thought from a creative perspective that made me better at it. Do you feel the same way, that kind of living it and breathing it day in and day out elevates the work that you're able to do for people?

MARLENE: Absolutely. I understand my clients more because I understand nonprofit and the culture and the opportunity and the challenges that come within the sector and I also just find it more inspiring from a creative point of view. I remember one client was through an agency, but it was a mining company. I don't even remember what it was. Zinc mining or something, and it just didn't get me going the way my normal clients normally do.

BETH: I can completely understand. So we always talk about this idea of participation. In the work that you do, how does that show up?





DRIVING PARTICIPATION

WITH BETH BRODOVSKY

MARLENE: Well, OK, from someone who works in communications, I really believe that to be effective, you really have to understand your audience and so in my business, what that has turned into are two main things. Aside to my business, I serve nonprofit communicators who are not my clients through a blog. It's called Nonprofit MarCommunity and that's a place that I created where the communicators, the community of communicators can exchange knowledge and share ideas and basically it's a totally guest authored blog. So that allows them to find each other and learn from each other and to enhance that I run a monthly Twitter chat called the NPMC, nonprofit marketing communication, Twitter chat so there I get to participate in the day to day of the people I'm trying to serve by running that blog and by running that chat, I'm in constant contact. I'm participating in helping them in their day to day. I'm collaborating with them, with my community and those I'm trying to serve and that makes me more effective when I'm communicating with them and when I am trying to bring them in to what I do in terms of training or consulting clients.

BETH: Yeah, I can completely see that and it probably does it in a way that I do this podcast, which is more one way than I would like it to be. Everyone that's listening, the more you guys send me emails and let me know what you want to hear about, the better it will be as a resource for all of us, but in a community you really do get that. So it's not only a service, but it's also telling you what's bugging people right now.

MARLENE: Absolutely, all the time, yes.

BETH: We've just done an episode where I asked people if you got a grant for marketing what would you do with the money. I like to do things like that occasionally just because this tends to be just a one-sided conversation and so I'll put out messaging on Twitter and to my past podcast guests. You're gonna start getting that from me now. I think it's great any way we can get feedback and find out what are people struggling with. It's so helpful.





DRIVING PARTICIPATION

WITH BETH BRODOVSKY

MARLENE: Yeah, you really summed it up there because that one way as communicators, one way is not effective if that's the only way. So participation is key, and it really helps us to do our jobs better.

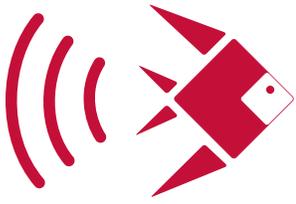
BETH: Interestingly enough, I've asked this question now to 120 people and I've been trying to look at what are the themes that are coming up when people do answer the question and you actually hit one of the two biggest themes that come up over and over again, which is knowing your audience. So can you talk a little more about, you talked about how that shows up in your work, but how does that show up when you're writing for clients, people that really know their audience versus the ones that don't?

MARLENE: Yeah, it's something that a surprising number of communicators want to skip over and I know why. For many of my clients, for many of my training participants, I know why. It's because as the communicator or the marketer in the organization, they might be the only one who values the time and effort that it would take to step aside and really think about audience, but it really kills creativity. It kills effectiveness. When you don't stop, and the main thing I really suggest from a writing point of view is to create a marketing persona or some people call it a buyer or an audience persona.

BETH: Right we call it a perfect person profile.

MARLENE: Oh there you go! Before starting any significant writing project, stop and think about your intended ideal reader is. It doesn't mean ruling out anybody, but it does mean figuring out who you really, really most want to reach, writing a persona, spending an hour or two hours thinking about exactly who they are, where to find them, what their needs are, what they're curious about, what they want help with and then move on to writing so that you have that lens to look through to figure out what words to use, what messages will resonate, in copy-writing speak what features and benefits to include in your copy and I see both sides. I see people who really value it, but I also see them as the exception and





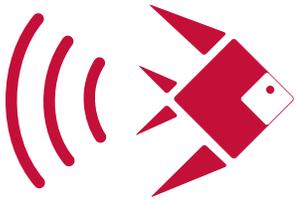
DRIVING PARTICIPATION

WITH BETH BRODOVSKY

many communicators want to skip that, but if you take the time, everything becomes much easier. Writing becomes much easier.

BETH: It so does and it's funny. I feel like people want to skip it because either they don't understand it, they haven't really been exposed to it or the other reason I've heard is it's so corporate. Like that's so big business and a lot of times people work in nonprofits because they want to. They want the difference between the big behemoth of a corporate situation, but it's like you just got to get over what you think it is. I'll use an example. I was at a client meeting yesterday. We're working on the endless website project and nine times out of ten as Marlene and I were just talking about earlier is content is where the projects die a slow painful death and so the initial meeting we had where we define the persona and we did some branding and some clarification around all of that months and months and months ago. Then we built the website. They decided they wanted to write their own copy. So we're now kind of slogging through this part of it and it's actually a second website. We finished one and now we're working on the other one and so people that run businesses, founders, they do what any normal human being does, is over time, new things show up and so we're sitting there and he's like brainstorming off of these ideas and saying, "Well, we need to add this," and "This isn't right," and "Why did we do that?" and he wanted to add something and as soon as he said it, I said, "Is that something that would help with this decision?" and it was like instantly like he totally forgot about the persona, he totally forgot why we made all the decisions that we were making, but as soon as I said that, it all clicked back into place. He was like, "You know what? You're right. Let's table that and we'll make a whole discussion at a future meeting," and we moved right on with the meeting. It's like I try to explain to people all the time. It puts cattle chutes around things when you make decisions and it makes it so clear what you should be doing and what you shouldn't be doing that you end up getting these projects derailed going down because in this case, the client has a brand new marketing coordinator who doesn't understand. She wasn't there when we made these original decisions so she thinks some of the stuff we did was dumb and why would you do that because she came from the law industry and she's bringing





DRIVING PARTICIPATION

WITH BETH BRODOVSKY

that with her. So having this clarity in this person, it will help her in what we're going for and it moved the meeting along and there we go. We got out of there without the project blowing up into something it didn't need to be.

MARLENE: That's fantastic. I would want to say it's surprising. I haven't actually heard the perspective that you shared about this idea of a marketing persona being strange, and I would flip this on its head because nonprofits always want to or should and often want to create a personal connection. So I don't see it at all as a corporate approach. I see it as reminding our clients and reminding ourselves there's a person we're trying to reach. There are individuals and so you can't do that if you don't stop to think about them.

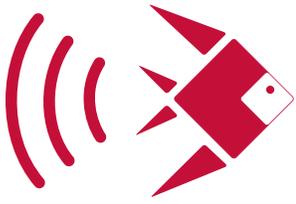
BETH: You know, that's so good. I'll have to use that because I sometimes struggle a little bit with the language to explain to people that if they are thinking if you're trying to sell cereal to millions of people over TV ads, of course you want personas, but that is right. The biggest difference I find in the marketing versus the corporation and marketing as nonprofits is like everyone really should be trying to go for that personal connection, but a nonprofit is dead in the water if they don't.

MARLENE: Yes, absolutely.

BETH: One of the ways that people can create connections is through different types of communications. I am a firm believer that, in fact, our tagline for my business is "Communication builds community." I really believe that good, strong, helpful communications, they help define your brand, clarify to people who you are and they help you facilitating this relationship and so an annual report is often looked at as something that's just like a requirement, like I've got to get these numbers out, but actually, legally it's not required. Why are people doing annual reports lately?

MARLENE: Well, I think it is a bit of something that is not questioned. It's a funny





DRIVING PARTICIPATION

WITH BETH BRODOVSKY

element to the communications mix because very few things just always have budget, but I find there's always budget set aside for annual report, and it's just sort of a status quo thing. Of course we do it. The CEO wants it. The board wants it and we want to hand it out at the annual general meeting. So honestly, I think that's a huge part of the rationale. It's just custom.

BETH: Right. So then the question is if it's just gonna be done, at most nonprofits there's not a lot of money to do every type of communications that you want. So if so much of resources are going into an annual report, how can the people that have to use it, like the communications team and the fundraising team, how can they make an annual report like the most effective tool for them that they possibly could?

MARLENE: Yeah, well I think this is an opportunity to take something that is status quo and instead treat it as a creative challenge and think again going back to that persona conversation, even if it's only going to be handed out to a few key people

BETH: So with all the resources and efforts that go into making an annual report and if it's not something people are willing to let go of, how can marketing communications teams and fund raising communicators make the annual report into something that is the most effective tool for them?

MARLENE: Yes, OK, so my advice here is it can be seen as something very boring or very dull. Don't let it! Turn it into an opportunity to be creative and then to go back to those marketing personas we were talking about instead of just churning out a report, even if your annual report is only going to be distributed to a few key stakeholders. Think about those stakeholders. Think about what you want to communicate to them, what's important to communicate to them and this is where I strongly recommend introducing a theme for your annual report, to break out of the status quo, break out of the year to year and really turn it into a creative exercise.





DRIVING PARTICIPATION

WITH BETH BRODOVSKY

BETH: OK, so talk a little bit about what you mean by a theme. What kind of themes are people using?

MARLENE: There are all kinds. There are a couple that I would say stay away from. If you Google annual nonprofit report, you'll probably find quite a few changing lives and making a difference and transforming lives report, but it doesn't have to be a tag line. Those are sort of an attempt to be a tag line. It can be a single word. So this year and honestly it doesn't have to be the most surprising or shocking or unusual thing. This year one of my clients was coming out of a very challenging year and they had to make a lot of tough decisions and putting layoffs and cutting programs, but it was for a purpose. It was an organization realizing they needed to focus in on where they could make the biggest difference. So focus became the theme of the annual report. The word focus and in this particular case, what we ended up doing was essentially a long form blog post. It was a few more bells and whistles than that in the format, the online format, but it made the most sense based on a theme and the theme was about being accountable and reporting back on how they focused in on what mattered in a very difficult year and so the theme was focus.

BETH: That's great! I love that. So people are doing that and you've seen them do it in lots of different formats.

MARLENE: Yes definitely. You mean the print format here?

BETH: Yeah. Did you say it was online?

MARLENE: Yes, purely online.

BETH: A purely online tool. So does it work as well when people do it in print?

MARLENE: Yeah for sure. I mean, sometimes the theme is predetermined. There is no negotiating and an example would be an anniversary year for a nonprofit, a 25th or 75th and so I've seen them do timelines, a foldout almost like a poster. It's





DRIVING PARTICIPATION

WITH BETH BRODOVSKY

a very simple report, but they took advantage of looking back at their history to choose their format. I know some nonprofits have had less to say and more data to report on and they've done something really simple like an infographic as their whole report card, I'm sorry. A postcard infographic for their annual report.

BETH: How have you seen when people choose a theme, how does it make the whole process of doing an annual report easier because either way, whether it's a multi-page print piece or a web based thing, there's multiple people that have to be involved. There's a time line that has to flow through. There's everything from planning, the writing, the design and with the website, the programming. So where does this theming aspect help streamline the process?

MARLENE: Great question. So thinking as a copywriter and a content creator and I referred to this earlier, when you decide you're going to come up with a theme, the process of developing your theme makes annual report writing easier because it makes it into a fun creative exercise. It gets the creative juices flowing and you can just have a little more fun. You realize you can build fun into brainstorming and running ideas off of each other and throwing silly ideas out there and finding the right one. Now it helps in that creative aspect. It helps creatively and it helps tactically. Again, as a copywriter, once you've narrowed in on your theme and I've narrowed in on a theme, a theme tells me what language to use in the report. Instead of having a world of possibility, I like being creative in perimeters. So a theme provides those perimeters. So I start to have ideas for specific words or phrases to use throughout the report in things like the cover perhaps, although I honestly don't feel that the theme needs to be explicitly stated on the report cover. It can influence words that you use in sub-headings or section headings or the title across a spread in a report, photo captions, text boxes, pull quotes. Theme gives you ideas for the language to include in all of those places as well as through the body copy and then there's kind of a much more of a, you talked about those multiple players and I know, six years in-house and then eight years as an outside consultant, but certainly from my in-house years and afterwards, I see how annual report time becomes jockeying for position in the annual report





DRIVING PARTICIPATION

WITH BETH BRODOVSKY

time.

BETH: Oh my gosh! I never thought about that, but you're so right. That does happen.

MARLENE: It's awful because what happens is it's jockeying for position, jockeying for equal billing or equal billing in the report, which is not a good idea. Not every department or every program realistically would have something to say every year of significance to say every year. So a theme does help you to make some tough calls or they're not as tough with a theme in place because if an update doesn't support the theme you've decided on as an organization, then it doesn't make it or it waits another year when it is more relevant to the focus of the year.

BETH: I think that's so true because we've seen the same thing happen. It's like I feel that I see it in everything from like creating a mission statement where it's like, "We can't cut Bob's word." It's political and all that stuff happens and you do want it to be a summary of the year, but a summary of highlights.

MARLENE: Yes, what was significant about the year, not just what happened that year.

BETH: Which ultimately I feel gets back to knowing your audience because the problem, what I think happens when people are jockeying for position, if they are at that stage, they are writing their report for themselves as opposed to writing the report based on all things that are going on here. What does the audience for this report need to know in order to continue supporting us?

MARLENE: Absolutely, that report I mentioned is a great example where if they did the status quo, ask everyone for their updates and put them into the report, there would be a very good chance that everyone reported on their activity and the elephant in the room would never have been acknowledged. Layoffs, program cuts.





DRIVING PARTICIPATION

WITH BETH BRODOVSKY

BETH: Yes, because when people try to report on their activity, nobody wants to get fired so everyone is going to make themselves look like they're awesome and their department is awesome and everything is great and one of the most damaging things in communications I believe probably the most damaging thing is what I call a disconnect, when things look all pretty, but everybody knows what's really going on or if somebody hasn't experienced working with you and it doesn't line up with other things that they know about you. When there's a disconnect between what you say and what you show, it hurts you more than if you've done nothing.

MARLENE: That's so true and that's why I brought up that example. When you talk about the reader and the marketing persona, if that glossed over annual report went out, you better believe they would notice. We know a whole lot was going on that you didn't talk about in that report. We want to know about it.

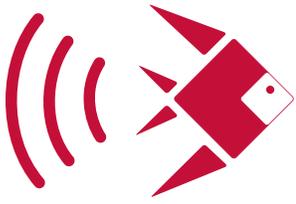
BETH: That just makes people feel like there's something shady going on. Like that makes people more suspicious and more curious and the number one thing that you need in a nonprofit is trust and if people don't trust you to do the work that you say you're going to do, the report on the work that you say you're gonna do and just basically steward their money well, they're not gonna give it.

MARLENE: Absolutely.

BETH: That's so helpful. Here's the tricky question. How do you get people on board with this idea because as you know and an annual report is a project that a lot of people have their finger in, have attachment to, have a say over and projects can get really kind of locked up in circular meanings and opinions and they can struggle to move forward. If you're trying to change the way you do it and move to this thematic approach, are there any tips you can give people to make it easier to get people on board with this change?

MARLENE: Absolutely, so first it's about the final product. I just want to touch





DRIVING PARTICIPATION

WITH BETH BRODOVSKY

on the idea that when you work with a theme and so this is over a year thing when they see how a theme has worked or how a theme has worked for others, then your internal players will see that theme lends itself or leads to better design choices, more of a hook for readers, more of a again reporting on the significance, more communicating something instead of just communicating updates, but from a logistical point of view, for the person who is creating the annual report, there are two things that happen. I would be surprised if they aren't happening as the norm. The two things are I send an email out to all of my internal stakeholders saying, "Can you please send me your updates for inclusion in the annual report?" or the other thing that often happens is a meeting, a kick off meeting. We're gonna do an annual report and bring your updates and we're gonna talk about what can go in the report. You kind of touched on those Beth and those I believe are mistakes. I think my number one tip would be do you think you're being efficient when you do that email or you conduct that meeting? Spend time on one-on-one conversations with a few key people. It's not going to be everyone. It should certainly be your organization's leader, your executive director, CEO or president. It may or not be the president or the chair of the board. It should certainly be someone in finance, someone leading programs, 4, 5 maybe 6 key players. Sit down with them. Have a real conversation about the year. Ask them to tell you what was significant. Take lots of notes, but in a conversation you can dig deeper for nuances about why things are important. It will break you out of that "I've got a pile of updates. Now what do I do with them?" problem. It also makes everyone feel included, and you'll be briefing them. You'll be telling them, "Listen, I'm sitting down to talk to you to figure out what was significant about the year and how that can shape our annual report." If you think internal players are gonna think it's silly that you want your annual report to have a theme, you don't even need to say it yet. You just need to tell them you're looking to find out what was significant or what mattered or what mattered about a year in particular. Those conversations go a really long way. I actually have a few questions that I find really helpful. Later I think we're going to direct people to my blog, but a few key questions you can sit down and ask and it goes miles and miles beyond those kick off meetings or email requests. Then you can





DRIVING PARTICIPATION

WITH BETH BRODOVSKY

go back and ask for if you did a report to the board, can I have it so I can get the details out of it.

BETH: I love that. We will make sure we put a link to those questions in the show notes page so make sure you go there and look at it, but what I also love about that is you start off by saying we need a theme and I bet there's a lot of people that are listening are gonna go, "I don't know what the theme should be." How do I tell people what I want to write for the theme. If you start backwards and start asking people what was significant, like the theme will probably trickle through all of that and it will make sense on its own.

MARLENE: You may go in thinking you know. I happen to even with clients thinking I have a sense from one briefing meeting and some background documents thinking I might know what the theme will be and I usually change my mind after having those conversations.

BETH: Really? That's good to know.

MARLENE: Yes, definitely.

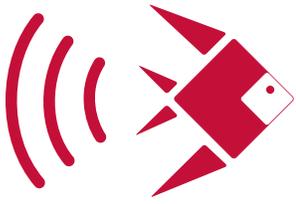
BETH: So don't go in with any too set expectations.

MARLENE: No, I mean you're genuinely including people in the process of shaping the report.

BETH: Right. So I know that your primary focus is on the writing, but I'm getting a lot of questions about print versus web, print versus web. Why do one over the other? It costs so much to print. Then it's like if you do the web version, then you've got costs to design your programming so it's not that either one is free. Can you give your thoughts on why to use which one?

MARLENE: Yeah, I do focus on content and I know it can get harder and harder to justify a print budget, but I always come back to what may be my easy answer





DRIVING PARTICIPATION

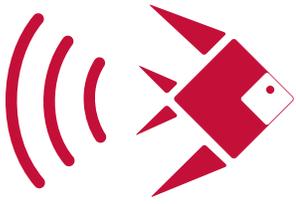
WITH BETH BRODOVSKY

out is what makes the most sense for your audience? If you have a group of stakeholders, the ones you really want to read the annual report and you do an online version they're never gonna go look at, but they're sitting in a room at an annual general meeting and you put it on their chairs and they're actually going to read it, then that's what you should do and then maybe if you know you've got to do print, there are many ways to be more cost efficient about how you do a print annual report. I think any advice for any communications tactic, I usually stay out of the devices and say to go back to your audience and do what makes sense.

BETH: It's funny how many times that is what it comes back to. It's not about what you want and the thing that's frustrating a lot is people are like, "That's a lot of money." Last year we had somebody on the podcast that does a newsletter, a print newsletter, and she makes, if I'm remembering correctly, she makes \$3 million I think. A lot of money. I don't know what it was. It was a tremendous amount of money that she makes on this print newsletter and they didn't start making that money until they started spending more money on it, until they went full color and hired a professional designer, until they hired a professional writer. The more they invested in it and the better they made it, the more money it started to generate. It's hard because a lot of people in nonprofits don't have a business background to necessarily understand. I don't have a business background either. I've learned it slowly and painfully over 20 years being in business that investing money into things, if you do it the right way, it will show up on the other end.

MARLENE: Sure. I mean the challenge with annual reports, the challenge here is, it's not a revenue generator. It's not even, it's an accountability piece. So in what way can you most effectively be accountable to the people you need to be accountable to? I mean, if it becomes a video annual report because that's the format that's going to make the most sense for the culture of your organization and the people inside of your organization and it can be a really informal, graphics only, then do it. A lot of organizations have this like wink, wink





DRIVING PARTICIPATION

WITH BETH BRODOVSKY

acknowledgment. No one is going to read our annual report. So figure out how to most efficiently deliver it to the few, that small group that really need to know that information.

BETH: Absolutely, definitely. These are just big decisions that have to be made and it's hard to know which way to go. Another thing that I've seen clients do is they have used a theme in an even bigger way than just the annual report. I have had a client that came up with a theme in the beginning of the year and used that theme, including in their annual appeal and in their asking throughout the year and used the annual report to kind of be like the closing of the campaign. Like this is our year's worth of conversation and this is what the summary of that year's conversation. Have you ever seen other people take that theme that they come up with and use it beyond the annual report?

MARLENE: What you just described is amazing. I love it and I haven't seen it. I've seen a slightly more obvious application. For example, the annual report theme is developed and it only makes sense to only use it as the theme of the annual general meeting if there's collateral to be developed or for the end of year awards to give shape to speeches or your annual report theme and the content, when you use a theme, it gets you to think about certain key messages, just the current key messages as opposed to your big picture organizational current key messages, but the current this year, what do we have to say or what to say. It unearths some very key messages about the significance of your work, of your current work. So that can find its way into speaking and speeches. If your CEO or your executive director is on a bit of a speaking circuit, it can shape speaking presentations and other types of reporting back. That's where I've seen it more, but definitely what you described sounds beautiful and it can be temporary. It can be used for the newsletter or the blog in the time frame around when your annual report is getting released as well.

BETH: I'm seeing all sorts of interesting things happening around theming. Another person we had on the podcast is here in Philadelphia. It's our Greater





DRIVING PARTICIPATION

WITH BETH BRODOVSKY

Philadelphia Cultural Alliance and since we had them on, they actually have a new executive director and when the new executive director came on, she decided that she wanted to create a theme for basically her tenure or at least for right now. So she came on and as a new director, she wanted to move the whole, not just the organization, but the sector. She wanted to move the sector in Philadelphia in another direction. So she came up with this whole I can't remember. I'm drawing a blank. It's something fast forward or something like that and everything that they're doing, every educational session, every webinar, every event and their newsletter is all around servicing this movement I guess that she's trying to create in the region so it's really interesting to see that you can make it be a theme for your own annual report, a theme for a season of communications or what's it's done for here is it took somebody who was not involved in the organization at all to somebody that was like leading the organization with a capital "L" very quickly.

MARLENE: Nice. That's fantastic!

BETH: One other sort of tactical question I wanted to ask you. You said that the purpose of an annual report is for accountability. What's your opinion of asking in the annual report? Like putting an envelope insert into it or putting on the blast panel "don't forget to give" or something like that.

MARLENE: Well, I have another disclaimer here where I say this often. I really don't focus on fund development or fundraising, so I don't have experience to say what works, but there is always that idea that I believe in that for every communication there should be some kind of call to action. Don't waste that opportunity to ask people to take action. So on that basis I would say it's worth it. It might make more sense though, again depending on how widely you distribute the annual report, the culture of your organization and who is going to receive it, a different call to action might make more sense.

BETH: I love your perspective on that. I try really hard not to warn or coach





DRIVING PARTICIPATION

WITH BETH BRODOVSKY

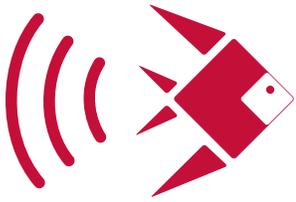
people when I ask them that question. It's funny. I was just asked by somebody last night to help with an organization and once again I had to communicate to them that there's a difference between a communications consultant and a fundraising consultant. You and I, we both work on the communication side to support nonprofit missions. That doesn't mean that my expertise is in helping you decide whether you should have an event or hire a major donor development person or whether you need to implement a planned giving campaign. I can't advise on stuff like that.

MARLENE: Yes, but just think of imagining a very small distribution of an annual report just to maybe the board members and some high level donors and at the beginning the timing would affect it so let's say if the beginning of the time frame is when they're developing a new strategic plan, well I don't think that's necessarily the right audience to ask. In an annual report, you're reporting back to them. They deserve to know and maybe your call to action is to tell them that was last year. We're getting ready to shape the future of this organization so maybe the call to action is about getting involved with the strategic planning process. It could be anything.

BETH: I love that! It's so easy for those of us that we're all involved with helping organizations raise enough money to survive that that's not the only way to help. That's not the only thing you need to be asking people to do. The whole idea of participation is getting people to take action on any of the number of things and then once you get them to take action, having some sort of a pathway that they can get slowly deeper and deeper into that process. One more step on the participation chain. Your annual report. I love it. Marlene, this was so helpful. I know you did give that one tip of definitely do this if you're bringing everybody together, but is there any other sort of place that you would suggest people to know, something that you want them to think about if they decided to begin thinking about having an annual report that had a theme?

MARLENE: Well, I have a don't.





DRIVING PARTICIPATION

WITH BETH BRODOVSKY

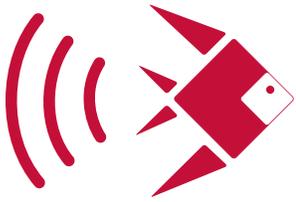
BETH: That's good. You gave a do so let's do a don't.

MARLENE: I have a don't that comes to mind when you ask that because, my don't is don't, let me backtrack a little bit. A theme will help you to decide on a creative structure for writing your report. They go hand in hand. Once you come up with a theme, figure out a meaningful structure to communicate the message that you've got, but to go with that, the don't is don't structure your annual report based on your organization's departments or your organization's structure, which is super common. So a theme brings you out of that because it won't make sense any more.

BETH: I love that! It's so funny. I had that exact same conversation with someone the other day as well. Here's the thing I would tell people. It's hard to know when you're doing it yourself. So if you're writing it yourself, if you're trying to do all of this yourself, make sure that you're showing your work to somebody that doesn't know you at all or isn't connected with how you structure or how you do things. It's so easy to think you're being donor focused, outside person focused, but when you're [unclear 24:20] the way that you do things, it's actually a lot harder to tear yourself away from it than you think. Don't beat yourself up if you do it, but put some things in place to make sure that you don't.

MARLENE: I think a lot of us as communicators forget something very simple we can do, which is just pick up the phone and call someone or shoot an email over to someone who would be that ideal reader. You know them. If you don't know them, your executive director knows them or someone in programs knows them. Shoot them an email. If it's another report or other communications tactic, but in the case of the annual report, shoot them an email and say, "What would you want to know about our organization?" It doesn't mean you're going to completely answer their question in the annual report as they've laid it out, but it will just remind you of who you're trying to communicate with and get you thinking a little bit more about their needs.





DRIVING PARTICIPATION

WITH BETH BRODOVSKY

BETH: That is so helpful. Marlene, thank you so much for all of your insight, for sharing everything with our community. How can people get in touch with you if they had more questions?

MARLENE: Well, first thank you so much for having me on. Thank you. I really appreciate that. My online hub, my digital home base is my website so it's MoFlow.ca, m-o-f-l-o-w.ca is my company name and you can find me there. It's a pathway to other things like my Facebook page or the nonprofit community that I mentioned to learn about my training and all of that. I am pretty active on Twitter so my Twitter name is Mo_Flow. I didn't get there in time to not have to use that underscore on Twitter and of course, speaking about Twitter, the NPMC chat, I'm active there once a month speaking with nonprofit communicators, but I'm pretty responsive. I like Twitter. It's a great place for me to be sitting in my home office here all by myself to connect with people and then sorry?

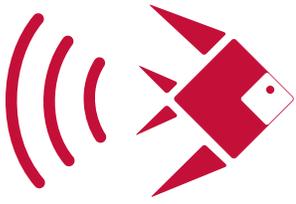
BETH: I was going to say, can you tell people when the chat is?

MARLENE: Oh, thank you. Yes, so it's the last Thursday of every month at 1 o'clock p.m. Eastern time. We do take occasional breaks so when this is airing, I think the next break that will be coming would be over the Christmas holidays and we move it. I'm Canadian, but we move it in November for American Thanksgiving because I wouldn't get anybody participating so we move it to Wednesday, but it's usually the last Thursday of every month at 1 o'clock p.m. If you're on the site, I always update so people always know what the date is of the next chat.

BETH: Excellent.

MARLENE: There's one thing that I wanted to mention Beth. I am in the process of developing with a friend and designer an annual report guide. A guide to planning your next annual report. So if people at the time they're listening, it may be up or you may be able to just sign up so you're notified when it is released. That would be at Mo_Flow.ca/annual-report-guide.





DRIVING PARTICIPATION

WITH BETH BRODOVSKY

BETH: Perfect! Thanks so much. I'm gonna have links to everything that Marlene shared up on the show notes page. Thanks again for coming. This was a blast!

MARLENE: I enjoyed it thoroughly. Thank you, Beth!

