Communications Planning Toolkit for Community-Based Organizations

Using Strategic Communications to Create Real-World Impact

Presented by Coleman Collaborative | December 2025

Introduction

This toolkit is presented by Coleman Collaborative, a consultancy that worked with the Pediatrics Supporting Parents (PSP) Proof Point Community (PPC) in Durham, North Carolina as they transitioned from a PPC to an independent nonprofit organization. It is designed to be flexible and equip other CBOs with some of the essential tools and strategies needed to develop a communications strategy and effectively communicate your organization's mission, impact, and needs to a wider audience.

Starting or growing a nonprofit is an exciting journey, but communicating who you are, what you do, and why it matters is just as important as filing the paperwork or building your programs. Whatever stage of development you are in, clear and strategic communication is essential. This toolkit is designed to help you hone your voice, enhance your outreach efforts, build stronger relationships with stakeholders, and ultimately, amplify the positive impact you have on your community and the people you serve.

Background

ZERO TO THREE engaged Coleman Collaborative in 2025 to support the PSP Durham PPC as they planned to launch an independent nonprofit organization called THRIVE Family Health & Education Center. Our remit included a landscape assessment, communications and launch plan and supporting brand materials, and materials to support fundraising efforts.

Whether you engage an outside consultant or do some or all of this work on your own, the process and timing will vary depending on what stage of development you are with your nonprofit, what elements you need to develop, and how many people work with you on these efforts. For example, creating a new name, logo and brand identity should ideally come before embarking on messaging. In developing this toolkit, we made some assumptions based on our work with THRIVE, as the team already had a number of items well developed or in development, including:

- Name, logo and brand colors
- Website with developed content, including core values
- Grant applications and other work examples for research
- Beginning of a strategic plan

At the onset, and especially if working with a consultant, you should consider these best practices to help things go smoothly:

- Co-develop a scope of work and timeline and establish a process for adjusting these, if necessary, during the project.
- Assign a main point of contact on your team who will manage the process, and a second person as back up. This may be someone on your communications team and your development team.
- Plan for weekly or biweekly status meetings, whatever works best for your team.
- Identify the key individuals who need to join these status meetings regularly.
- Tap a board member with communications experience to serve as a guide or advisor, if possible.

In keeping with the organization's values, we designed this as a highly collaborative, two-way process. Parent team leaders were engaged and consulted at multiple stages, and we conducted a name-review process that included input from other PSP representatives as well as the organization's Parent Advisory Team.

What's Inside

Whether crafting a mission statement, drafting website copy, or preparing a launch campaign, you will find ready-to-use resources and adaptable templates to help set you up for success. It's important to establish a clear, compelling presence that reflects your values, resonates with your community, and differentiates your organization from day one and beyond. Inside you will find guidance and materials to help you:

- ☐ Define your story
- ☐ Craft a message framework
- ☐ Develop key messaging
- ☐ Create supporting materials
- ☐ Prepare to launch your organization
- ☐ Reach out to prospective funders

Let's dive in!

What's in a Name?

If you are planning to come up with a new name for your organization, we strongly recommend you work with a brand consultant to help with this process. Along with your landscape assessment (see below), a consultant can help guide your team through the process, and mine for words, insights and information that can help inform a unique name for your organization. Remember, your name and logo are important components of your communications and should do some heavy lifting for you, but they don't have to communicate everything about the organization. Whatever path you take, keep these best practices in mind for naming your organization:

Criteria

- Convey meaning about the organization (i.e., direct, not obscure)
- Provoke thought and deeper interest in the organization
- Easy to say and/or abbreviate
- Different from others in the space (whether NPO or for profit)
- Broad enough to be future thinking, sticky
- Ability to eventually stand alone (e.g., without a tagline)

Avoid

- Anything too specific to any one ethnic/demographic group
- Jargon (e.g., medical or public health terms)
- Not too trendy (stands the test of time)
- Made up words unless very clear what it is

Once you've landed on a name or names you like, be sure to research available URLs for .org and consider purchasing the name with .com and .net as well, if available.

Word Bank

A word bank exercise is a great way to generate dozens of words that could potentially be formed into a name for the organization or provide inspiration for one. Use these questions as a guide:

We do… action words or phrases that describe what our organization does/will do

We help…describe the people we serve.

What problem do we address or help to solve?

What words describe/capture what will be different in our city/state thanks to our work?

What makes us different from others in this space?

How do we want people to feel after interacting with our organization?

- We value...

Landscape Assessment

Whether you are a new or established organization, you will want to identify the “white space” for your brand. This means creating a unique brand, value proposition, and messaging that differentiates you from other organizations in your space. A landscape assessment should research and map competitive/partner organizations and understand the issues and trends impacting the landscape in which your organization will operate. This requires reviewing all current materials and related research, as well as reviewing any relevant news stories, and researching your partner/competitors. Some key elements of the landscape assessment are stakeholder interviews and a S.W.O.T. analysis.

A landscape assessment is a comprehensive process, not detailed in this toolkit, but some background is included for reference. We recommend partnering with an independent consultant to conduct your landscape assessment for a variety of reasons:

- Staff can remain focused on their core responsibilities.
- Ensures neutrality throughout the process and brings valuable outside perspectives that could otherwise be overlooked.
- Stakeholders often feel more comfortable sharing feedback with a consultant than with internal team members, resulting in deeper insights and a more accurate understanding of your landscape.

Stakeholder Interviews:

Below are some example questions which can be modified or expanded upon, depending on the type of stakeholder (e.g., team members, board members, community partners, beneficiaries):

- What differentiates [ORG] from other organizations in this space?
- How do you currently talk about [ORG] to others?
- What do you think is most compelling to funders about [ORG] work and messaging?
- What do you feel your biggest challenge is when it comes to communications?
- What organizations in the same space do you think do a good job of communicating?
- If [ORG] were a person, what words would you use to describe them?

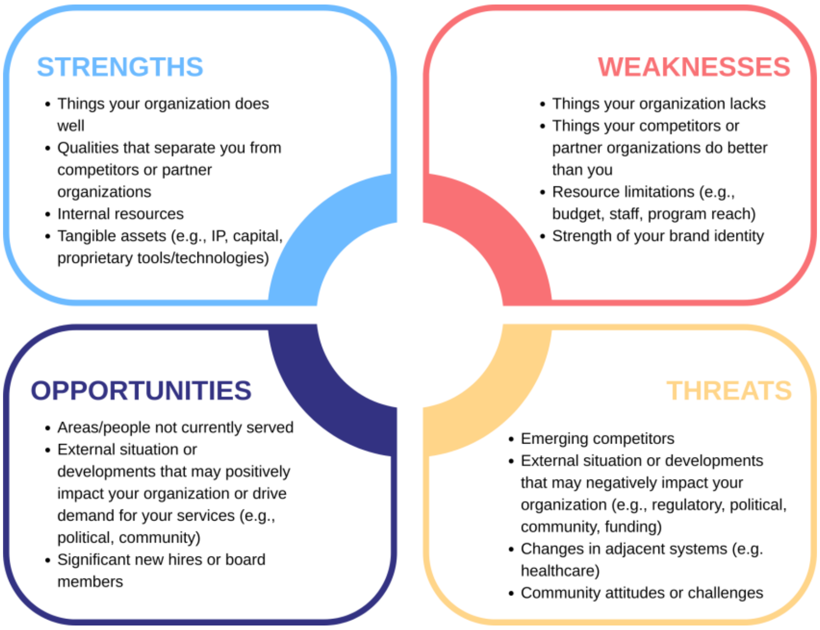
Fill in the Blanks

Additionally, consider asking stakeholders or the core team members to fill in the blanks of these statements, which can also help inform the brand tone and personality for the organization.

- I love that [ORG] ....
- I wish that [ORG] could ...
- If I could change one thing about [ORG] it would be...
- In the future I hope [ORG] can ....
- The programs or resources that would make the biggest impact in our community are ...
- As [ORG] grows I hope it never loses ...

S.W.O.T. Analysis

Using insights and themes gleaned from your landscape assessment, you can develop a S.W.O.T. analysis for the organization. Work as a team to complete your S.W.O.T. Remember that strengths and weakness are internal factors and opportunities and threats are external factors. At any time you can also do a S.W.O.T. on a particular department or function of the organization to help you determine changes you need to make or areas to prioritize for growth.



Vision and Mission Statements

Vision and mission statements for the organization are a first step as part of your strategic planning process. If you do not already have a defined vision and mission statement, distilling all the information gained through the landscape assessment, materials review and other word exercises can help you get there. For best practices, follow these guidelines:

- Vision Statement
    - Aspirational and inspiring
    - What the world will look like when you accomplish your mission
    - Aim for 5-10 words maximum
- Mission Statement
    - Speaks to what you do, who you do it for, how you do it and why.
    - 25 words or less

Messaging Framework

What is a messaging framework?

A messaging framework provides the tools to unify the organization's voice and guide all communications. It establishes messaging that informs everything from strategy to storytelling. It should align mission, values and language to ensure consistency across the organization.

How is a messaging framework used?

Your messaging framework will serve as the foundation for and unifying thread across all communications and content, including press materials, website, collateral and spokesperson messaging. You will want to develop broad enough messaging to appeal to a wide range of audiences but then hone it further so that you have messaging that speaks to each audience. For example, you may choose to use more technical language when speaking to healthcare professionals and more lay language for connecting with parents.

Five key questions serve as the key pillars of your messaging framework:

- Why do we exist?
- Who are we?
- What do we do?
- How do we do it?
- What's our impact?

Use the language and insights from your stakeholder interviews, along with the prompt questions below, to help craft your topline messaging. Create one concise statement for each pillar and aim for three concise proof points to support each pillar statement. You should be able to use or adapt this language wherever applicable throughout your content.

Avoid jargon or complicated terminology that requires explanation. Keep your topline message simple and straightforward.

Why We Exist	Who We Are	What We Do	How We Do It	Our Impact
What is the problem or need you address? Who do you serve? What is most compelling about your impact, vision, the end goals?	What makes us unique? Are we the first, only, etc.?	What do you do – impact? What are you most known for, key programs or focus areas? Who do you impact?	How do you do what you do? Who do you collaborate with to achieve your goals?	What is your long-term impact? What are some key KPIs from your strategic plan? What does the future look like for beneficiaries and your community thanks to your work?
Support Point 1 Support Point 2 Support Point 3	Support Point 1 Support Point 2 Support Point 3	Support Point 1 Support Point 2 Support Point 3	Support Point 1 Support Point 2 Support Point 3	Support Point 1 Support Point 2 Support Point 3

Once you have developed your topline key messaging, you can further refine it for each key audience and also identify which communications methods and channels are best for each. Here is another approach for when you are ready to refine your messaging by target audiences:

Key Message	Supporting Points	Target Audience	Communication Channels
[Nonprofit Name] empowers [beneficiaries] to [achieve specific goals].	Share stories of individual beneficiaries who have been positively impacted. Highlight the specific programs and services that contribute to these	Donors, volunteers, program participants	Website, social media, email, newsletters

	outcomes. Provide data and statistics that demonstrate the effectiveness of your work.		
We are committed to [core values] in all that we do.	Provide examples of how your organization embodies these values in its daily operations. Share stories that illustrate your commitment to ethical practices and transparency.	Donors, partners, community members	Annual report, website, public presentations
Your support helps us to [achieve specific objectives] and create lasting change.	Clearly articulate the impact of donations and volunteer hours. Provide specific examples of how contributions are used to support programs and services.	Donors, volunteers	Fundraising appeals, online donation platforms, volunteer recruitment materials

Boilerplate

Develop standard boilerplate copy for press releases, grant applications, language to share with partners, etc. Your boilerplate should succinctly describe the organization and include one or two key impact data points, flagship programs, and your website URL. Use consumer-friendly language and avoid jargon. Revise it annually to reflect any new or updated information, or to remove any information which may no longer be necessary to include. For example, you may want to share about the history or origins of the organization initially, but eventually this may not be necessary and can simply be information found on your website.

Example:

About THRIVE Family Health & Education Center

THRIVE Family Health & Education Center partners with parents to create a cycle of good health and well-being for families and children. Rooted in our flagship initiative, Pediatrics Supporting Parents, we began in Durham, North Carolina in 2017 with a bold vision: to transform the transition into parenthood and give every child a strong start by enhancing the pediatric care experience. Building on this success, we work with parents and community partners to advocate for and improve early childhood support systems and co-design practical solutions that equip parents with the skills and resources they need through every stage of parenthood. By centering family voices and cultivating deep cross-sector collaboration, we're changing how communities support parents and children. Visit us at thrive-nc.org.

Q&A

Make sure spokespeople and other staff/board members are prepared to answer questions about the organization so that everyone uses consistent responses across the organization. Craft responses in an internal Q&A document and spend time or work with a consultant or your communications team to message train and prepare spokespeople. This can be done for media interviews, donor meetings, or any scenario where questions may arise. The document can also be organized by the category of stakeholder that may pose the question, along with general organizational questions. Be sure to consider tough questions that could be asked.

Launch Preparation: Communications Considerations

Set yourself up for success by creating foundational materials that will help you with your launch and everything that comes after it. Think about your team's capacity, and of course, budget, and what will set you up to shine:

- Would a soft launch with key stakeholders help build early momentum?
- Do you want to plan a launch event or do will it be more cost effective to pitch a local news story and issue a press release?
- What kind of website or communications channels will best showcase your work – and which ones do you want to create and confidently maintain as you grow?

- Consider how your community can champion your message, too. Who can help spread the word, and what simple, shareable tools can you create to make it easy for them to amplify your launch?

Fact Sheet / Backgrounder

Create a 1-page word document that does double duty: provides an easy reference sheet for staff and serves as an external document to share with any stakeholders. As with your boilerplate copy, be sure to update this regularly with new or changing information and data points. Once you have your messaging solidified, you can also create a more visually appealing version of a backgrounder to use at conferences, hand out to community members, share digitally, and more. Following are examples created for THRIVE Family Health & Education Center (notes in red).

1-Page Word Document Fact Sheet

THRIVE Family Health & Education Center

Fact Sheet

About Us *(Adapt from your key messaging framework or your "elevator pitch" statement.)*

Families thrive when they get the support they need – emotionally, socially, and through community and health systems – to create nurturing and stable environments for children early in life. Through THRIVE's Caregiver-Clinic-Community model, we engage parents, healthcare providers, and community organizations as equal partners in building resilient, integrated systems of care across Durham County – and help other communities do the same.

Our Mission

To support the health and well-being of North Carolina's growing families across all stages of family development through education, research and advocacy.

Programs

We take a comprehensive approach to care and co-design trainings and programs that equip caregivers and clinicians with the knowledge and tools they need to help families THRIVE.

- Parent Advisory Team – Made up of Durham caregivers who serve as Parent Leaders and conceptualize and support implementation of our initiatives. They ensure families are at the table where healthcare systems are being redesigned and have successfully piloted programs at Duke Children's Primary Care.

- Education – We are closing gaps in health literacy and connecting families to resources and services that help them thrive at every stage of the family-building journey. This includes our Parent Educational Suite – monthly bilingual, peer-led workshops on early relational health, child development, mindfulness, and evidence-based parenting tools.
- Research – We listen to families, honor lived experiences and conduct research to transform insights into better health outcomes, parent-driven programs, and family-centered policies.
- Advocacy – We amplify the voices of families to help shape policies and systems at the state and local levels that impact their well-being.

Our Impact *(Include past, current and/or projected impacts.)*

- Proven track record of engaging parents and HCPs
- Serving 600+ parents/families per year

Our Story *(Provide history/origin story of the organization. Eventually, this can be replaced with more emotional narrative, statistics or other newer and relevant information.)*

Launched as a 501(c)(3) in 2026, THRIVE began within Durham Partners for Early Relational Health (DPERH) leading Pediatrics Supporting Parents (PSP), where parents and providers co-designed new approaches to pediatric care to support better health and social outcomes for children and families. Building on this work – and the foundation of Durham's Early Childhood Action Plan – PSP is joining forces with Durham Children's Initiative (DCI), formerly East Durham Children's Initiative (EDCI), to strengthen the programs families already trust and create new initiatives grounded in whole family health.

Contact: *(Include at least one primary contact, such as your executive director or director of communications.)*

Danielle Little, M.Ed, Executive Director
thrive-nc.org
info@thrivenc.org
984-212-0602

Designed 2-Page Backgrounder

Press Release

A press release should follow a structured format, follow a style such as A.P. or Chicago Manual of Style, be written in the third person, and include:

- a compelling headline and optional supporting sub-headline
- a strong lede – an introductory paragraph (approx. 2-3 sentences) with the most important information: who, what, when, where and why should be covered
- supporting details
- factual data
- one or two quotes
- a clear call to action
- boilerplate
- contact info

[Nonprofit Name] Announces [News Headline]

Sub-headline with additional supporting news point

[City, State] – [Date] – [Nonprofit Name] today announced [brief summary of the news]. [Expand on the news with details, statistics, and quotes from key stakeholders].

"[Quote from Executive Director or other key leader about the news and its impact]," said [Name], [title] at [Nonprofit Name].

[Provide background information about the nonprofit, its mission, and its programs].

Contact:

[Name], [Title]

[Email]

[Phone Number]

[Boilerplate]

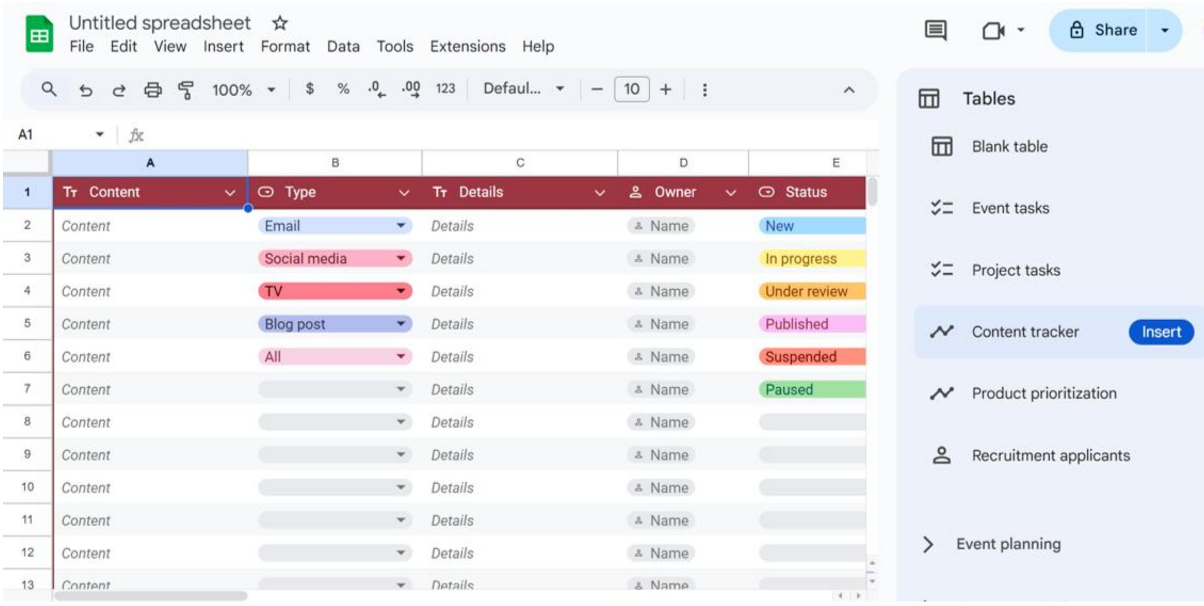
###

Set Yourself up for Storytelling Success

Let the pace and scale of your work guide the cadence and volume of your content. Build an editorial calendar anchored in monthly themes and start with a rhythm that feels sustainable – even if that's just one post a week or focusing on one or two key channels to begin with. Create an editorial calendar driven by monthly themes. Start slowly, even it means posting once a week or focusing efforts on one or two media channels.

- Incorporate holidays/observances, milestones, spotlights (e.g., parents, providers, CBOs, funders), events, news, blog content and more to help craft weekly content
- Segment and repurpose across different channels
- Engage parents, board members, community members to provide content (with editorial oversight)

Tip: Find numerous editorial calendar templates online. Google Sheets offers a flexible template for a content tracker.



Fundraising Materials

Sales Pitch Presentation

A well-designed PowerPoint presentation geared toward prospective funders can help you sell your organization in meetings, whether in person or via video conference calls. This presentation should provide you with a template that can be adapted and organized to suit your needs and target audiences. These materials should reflect your visual brand identity, key messaging, content on your website and in your backgrounder in a succinct, compelling and visual way. Along with your designed backgrounder, you can provide a PDF version of the deck as a "leave behind" or digital follow up to your meeting.

Key elements of your fundraising presentation include:

- ☐ The need and problem you are solving in your community
- ☐ Your organization's story/history
- ☐ Vison and mission statements
- ☐ Core programs – an overview slide and individual program slides
- ☐ Quantitative and qualitative impact - data, a story or two, anecdotes
- ☐ Points of alignment with the prospect (shared vision, beneficiary audience in common)
- ☐ Examples of ways to partner, how their funding will be utilized to reach your goals
- ☐ Contact information

Prospect Email Outreach

Following are some tips and best practices for cold and warm lead outreach:

Cold Outreach: Identifying Prospective Funders

Helpful when you are looking to cultivate conversations, whether with foundations or corporate prospects, and not just submitting a grant application blindly:

- **Do Your Research:** To ensure you are a fit for a funder, follow these steps before reaching out.
  - Find Alignment: Understand their focus areas, geographic preferences and funding interests.
  - Study past grants: Review 990s and recent grantees to understand funding levels, grant types, and project preferences.
  - Identify various points of entry and contacts, e.g.,
    - Foundations: grants, programs, marketing, executive director
    - Corporate: CSR (Corporate Social Responsibility), ESG (Environment, Social, Governance or Sustainability), Marketing, Human Resources, Employee Resource Groups
- **Find connection points:** Board or staff relationships, mutual partners, or events and conferences can serve as warm entry points. If you can't cultivate a warm lead, use LinkedIn and search their website to find the right contacts.
- **Tailor outreach:** Personalized communication shows that you understand their goals and how your work can help to advance them.
- **Be persistent:** Cold outreach typically requires multiple touch points (3-4 emails) before getting a response.
  - Be succinct.
  - Ask for 30 minutes to connect
  - Change up the content – offer an anecdote, impact data point, commonality, etc.
  - Ask if they are still considering your request versus saying things like "I haven't heard back from you."
  - Pause and look for future opportunities to reach out or find new contacts.

Warm Leads: Turning Relationships into Partnerships

Once you've made a connection with someone (e.g., through a board member, at a conference or other event) follow these best practices to help turn the relationship into a funding partnership.

- **Follow Up –** Don't let too much time pass after you've made a connection. Quickly connect with them on LinkedIn and send a brief message that reminds them of your interaction and that you look forward to continuing a conversation with them about how you can work together to advance your shared goals and visions.

- **Do Your Research** – Just as you would with a cold prospect, do your research on the prospect to understand their mission, areas of funding who they fund/how much, key leadership, programs, and any other information relevant to your organization and that can help inform your strategy.
- **Build the Relationship –** Unless you've been invited to submit a proposal, start with a conversation first. Reach out for an informal conversation to learn more about the funder's priorities and to share more background about your organization.
- **Prepare for the meeting –** Once you've secured a meeting, prepare accordingly for an in-person or video call. (Note: These steps apply for meetings you secure via cold outreach and warm leads.)
  - Know who will be in the meeting
  - Create a brief agenda to guide the conversation
  - Prepare your PPT slides to help you present about the organization and reinforce alignment with the funder.
  - Be prepared to answer questions, including challenging ones.
  - Even if this is an exploratory meeting, be prepared to explain what you are seeking funding for, and how much – demonstrate how you are a steward of funding.
- **Follow Up –** Send an email within 24 hours of the meeting to thank them, share a PDF of the deck you presented, and recap next steps. If appropriate, and depending on the next steps, offer dates for a second meeting.
- **Stay Connected –** Once you are in the process of submitting a grant application or a proposal to a funder, look for touchpoints along the way to stay connected. This should continue as part of funder stewardship once you've secured a partner. Reciprocity in a funder relationship builds credibility.
  - Keep them informed – Send a short, meaningful update about your impact, latest progress, a success story.
  - Be a resource – Share relevant insights or data or a new story that might interest them.

Brand/Communications Planning Checklist

While this toolkit is not intended to cover every element of a comprehensive communications or fundraising plan, it offers a strong foundation. Below is a practical checklist – a library of resources you can build, refine, and expand over time. These tools will help you establish a clear brand identity and communicate your organization's mission, work, and impact with confidence and consistency as you prepare to launch as an independent nonprofit.

- ☐ Brand Identity
  - ☐ S.W.O.T. Analysis
  - ☐ Organization name
  - ☐ Visual identity - logo, color palette
  - ☐ Brand tone/personality
  - ☐ Brand guidelines
  - ☐ Glossary of public health/medical terms you may use frequently
- ☐ Messaging
  - ☐ Target audiences
  - ☐ Messaging framework
  - ☐ Narrative
  - ☐ Vision and mission statements
  - ☐ Topline key messaging for the organization and by audiences
  - ☐ Boilerplate
  - ☐ Q&A
  - ☐ Toolkit/promotional content for staff, board members, external stakeholders
- ☐ Suite of Materials
  - ☐ Fact Sheet
  - ☐ Launch press release
  - ☐ Media advisory for events
  - ☐ Designed organization backgrounder
  - ☐ Program flyers/backgrounders
  - ☐ Bios (staff, board members)
  - ☐ High quality photos (original and stock)
  - ☐ Brand video
  - ☐ Testimonials and stories from beneficiaries and partners (written and video)
  - ☐ Impact data
  - ☐ PowerPoint Presentation template
- ☐ Owned Communications Channels
  - ☐ Website
  - ☐ Social media accounts and policies
  - ☐ Email marketing plan / newsletter
  - ☐ CRM
- ☐ Funder Prospecting
  - ☐ Sales pitch deck
  - ☐ Email templates for cold and warm outreach

Key Takeaways

Coleman Collaborative and the THRIVE team worked closely throughout the entire project. Clear communication and using the scope of work as our guide was key to keeping everyone and each phase of the project on track. In addition to the recommendations we make throughout this toolkit, we have compiled some key takeaways to help you before embarking on your own communications and launch plan:

If contracting with a consultant, choose one who fits your needs: As an organization focused on pediatric/early relational health, you may want to select someone with a strong grounding or at least some experience in your field. At the same time, look for a consultant who brings perspectives from both the public and private sectors and whose background differs from that of your existing team. This blend of expertise and fresh viewpoints can lead to more innovative insights and a more well-rounded approach to the project.

- **Prioritize target audiences:** Nonprofits typically have multiple stakeholder audiences to appeal to: individual donors, corporate funders and foundations, board members, community members, and of course, the beneficiaries you serve. Your topline communications messaging should appeal to a broad audience and be further segmented to develop target-specific messaging. Just remember to prioritize, because you cannot reach everyone, everywhere, all the time.
- **Develop your strategic plan:** A strategic plan is the 3 to 5-year roadmap for your organization's growth and impact. Branding, marketing and communications should be included as a key component of your plan and not just as a supporting player. Having clear short and long-term goals for the organization's programming and fundraising will help make your communications planning smoother and more focused.
- **Consider external factors:** External factors that could impact your plans or the communications process – your S.W.O.T. analysis may reveal some – are important to consider when it comes to process, timing, and people involved in the project. If working with a consultant, the more they know, the better they can deliver for you.
- **Assign a point person:** It's helpful to your team and the consultant to have a designated point person who will always be on calls and be responsible for gathering all the necessary information and materials, answering any questions, and streamlining communications. Ideally this will be someone on your communications staff or a combination of development/comms. One person can be the lead, with another staff member as their back up.

Make time for the process: Ensure your team can commit time, whether you are working with a consultant or embarking on this process on your own. This includes team meetings and completing any required preparation or follow-up work. Clearly define roles and responsibilities and be ready to communicate frequently and transparently throughout the engagement.

Next Steps

Now that you have the tools, put them to use! Start by reviewing your current communication strategies and identifying areas for improvement. Workshop messaging together. Tailor the message framework and other materials to fit your specific needs. Remember, these are living, breathing documents that should not just be put on a shelf. You will tweak them for different audiences and can adjust over time as your organization grows and evolves. Most importantly, be authentic, be consistent, and never stop telling your story.