Visual Identity & Brand Strategy Service Grant

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Outline

• What is a Visual Identity & Brand Strategy Service Grant?
• Why do a Visual Identity & Brand Strategy Service Grant?
• What are the deliverables and what is considered in scope?
• What is not in scope for this Service Grant?
• What are the criteria to qualify for this Service Grant?
• Process
  - Key milestones
  - Pro Bono Consultant team
  - Project management and tools
  - Timeline
• Spotlight: HIV Law Project and Eastside College Preparatory School

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What is a Visual Identity & Brand Strategy Service Grant?

The Purpose:
• Conduct research to better understand your organization, key audiences’ perception of your organization’s identity, as well as the visual identity of other organizations in the field
• Define a brand strategy and then find ways to articulate it in your organization’s new logo

Why do a Visual Identity & Brand Strategy Service Grant?

The Result:
• Stronger brand and positioning that better reflect your organization
• Consistent messaging and communications about your organization to clients, funders, volunteers, etc.
• Increased recognition for your organization
• Solid foundation for future marketing materials and decisions
Activities in Scope

- Interviews with a range of your organization’s key stakeholders
- Deliverables:
  - Audit to evaluate the visual identity and positioning of organizations that compete with your organization for funding and/or clients
  - Creative or requirements brief that details your organization’s needs and the Pro Bono Consultant team’s suggested approach – your brand strategy
  - New visual identity (logo) for your organization, which reflects your brand strategy
  - Extension of visual identity to business papers
  - Style guide for printing and use of the selected name and visual identity

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Activities that are not in scope

- Development of Key Messages
- Tagline
- Development of specific marketing collateral (letterhead, reports)
- Digital implementation of Visual Identity (on to website, etc.)
- Printing costs
- Development of a name
- Testing of Visual Identity

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Grant Criteria

We recommend you apply if your organization has:

• A current and complete Strategic Plan
• An effective organization name (otherwise, our Key Messages & Brand Strategy Service Grant may be a better place to start)
• Staff who can invest the necessary time to make the project succeed:
  – Executive Director: 10 to 15 hours total
  – Day-to-Day Contact: 3 to 5 hours per week
  – Board of Directors Representative: 5 to 10 hours total

The Process

- Define expectations
- Draft Preliminary Project Plan
- Conduct interviews
- Audit competitors
- Finalize and present project plan
- Write and present Requirements (Creative) Brief

- Draft and present 4-5 Directions for VI
- Draft 1 additional round of VI if needed
- Extend and present VI to business papers, with 2-3 options

- Produce print-ready visual identity; extend to business papers
- Write Creative Guidelines
- Write Print Specifications
- Write Name Change Checklist
- Approve finished name, visual identity, & business papers
- Conduct evaluations
- Celebration of success

* Please note that while the Pro Bono Consultant team completes most of the work, the nonprofit also has tasks and deliverables at each stage.

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The Visual Identity & Brand Strategy Team

- Account Director
- Project Manager
- Brand Strategist
- Marketing Manager
- Graphic Designer(s)

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Program Management and Tools

Your organization will be equipped with the following resources for the Visual Identity & Brand Strategy Service Grant:

- Leadership from Account Director
- Oversight from Project Manager
- Pro Bono Consultant team with Taproot tools that can be shared with you as needed:
  - Visual Identity & Brand Strategy blueprint
  - PowerPoint templates for Findings Presentation and Recommendations Presentation
  - Helpful articles and links

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 Ideal Timeline*

<table>
<thead>
<tr>
<th>Stage</th>
<th>Approximate Timing</th>
</tr>
</thead>
<tbody>
<tr>
<td>Letter of Intent (LOI) Sent</td>
<td></td>
</tr>
<tr>
<td>Account Director Assigned / Site Visit</td>
<td>1 month after LOI sent</td>
</tr>
<tr>
<td>Staffed</td>
<td>1 - 2 months after LOI sent</td>
</tr>
<tr>
<td>Kick Off Completed</td>
<td>2 - 3 months after LOI sent</td>
</tr>
<tr>
<td>Discovery Completed; Findings Presented</td>
<td>3 - 4 months after LOI sent</td>
</tr>
<tr>
<td>1st Draft of Visual IDs Presented</td>
<td>5 months after LOI sent</td>
</tr>
<tr>
<td>Visual ID Approved / Business Papers Drafted</td>
<td>6 months after LOI sent</td>
</tr>
<tr>
<td>Final Presentation</td>
<td>6 – 7 months after LOI sent</td>
</tr>
<tr>
<td>Creative Style Guide &amp; Business Papers Delivered</td>
<td>6 – 7 months after LOI sent</td>
</tr>
<tr>
<td>Project Closed</td>
<td>7 months after LOI sent</td>
</tr>
</tbody>
</table>

*Ultimately, depends on you and your team

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Spotlight: HIV Law Project and Eastside College Preparatory School

“The Taproot Foundation team] took the time to learn about our history and work, spoke to our clients and friends, and listened to what we had to say. And now we have a brand that better reflects who we are and what we’re trying to accomplish. It’s a brand we’re extremely proud of and very excited to launch – one we believe will resonate strongly with both our donor and client communities.”

TRACY WELSH
Executive Director, HIV Law Project

“This is our panther! is how students and faculty alike have described the new logo developed for Eastside by the Taproot Foundation team of volunteers. This will establish a consistent image for our school out in the community. We’re huge fans of the Taproot Foundation.”

AMY LIT
Development Director, Eastside College Preparatory School

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