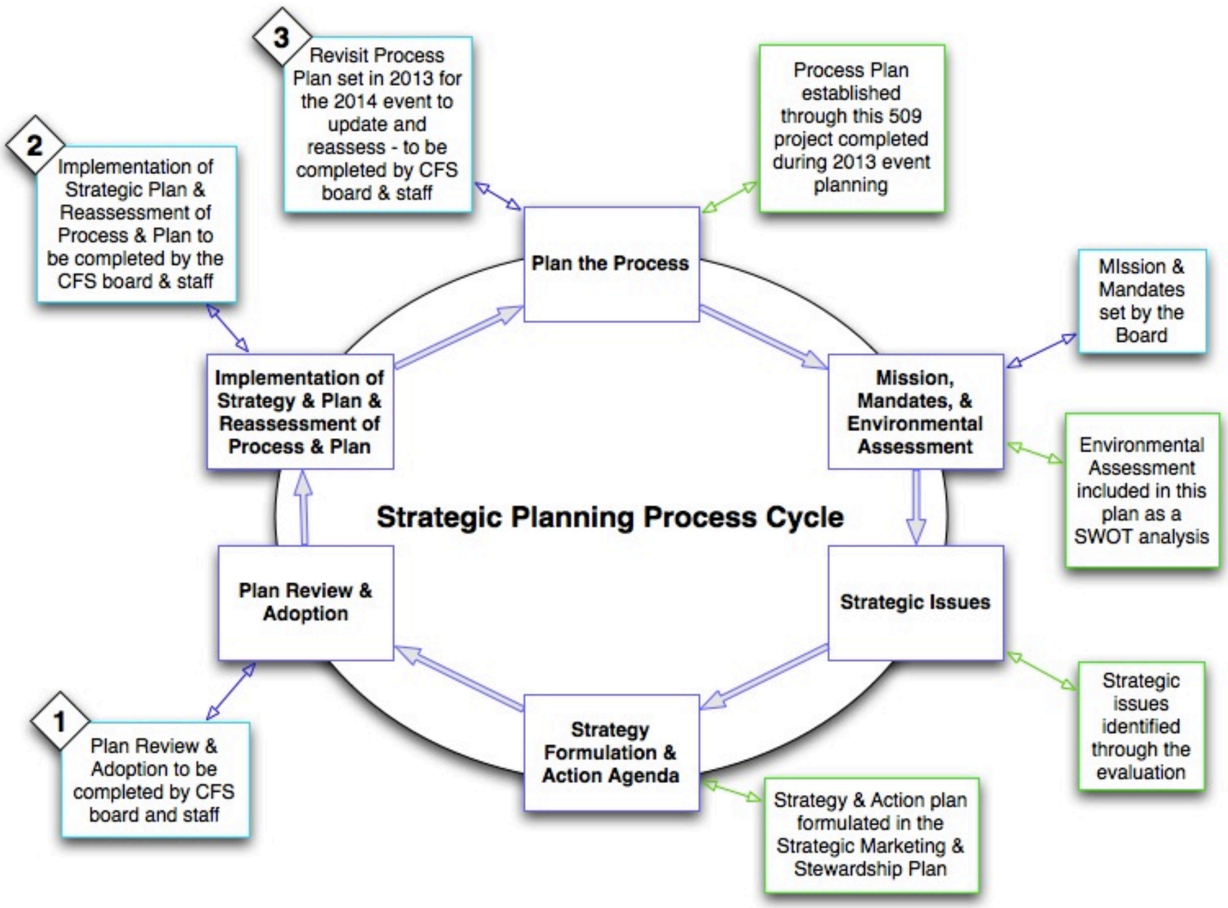
Strategic Marketing & Stewardship Plan

Table of Contents

Strategic Marketing & Stewardship Plan

The Strategic Planning Process

The Strategic Planning Process Cycle



This diagram of the Strategic Planning Process Cycle is taken from Bryson and Alston's book *Creating Your Strategic Plan* and is the model used for this strategic plan. This model is cyclical in nature being "organized around an evolving sense of … the mission, mandates, vision, and goals that emerge," it can begin at many different places (Bryson and Alston, 2011 p 9-10). This model is especially helpful given the evolution of this project and the strategic issues that emerged over the course of the evaluation process.

Strategic Marketing & Stewardship Plan

The diagram is color coded to show green elements included in this project and blue elements to be completed by CFS board and staff. This plan includes a discussion of the strategic issues, an environmental analysis for the event, and strategy formulation for implementing the plan. There are three steps laid out for CFS board members and staff to complete as part of the recommendations included in the evaluation portion of this project.

Step 1: Review and Adopt the Plan

The CFS board and staff responsible for the success of the event must review the plan and decide on any changes necessary to adopt the plan. Once the plan is satisfactory, the board and staff must adopt the plan. Adopting the plan involves setting a schedule, assigning responsibilities, and defining outcomes (Bryson and Alston, 2011 p 10).

Step 2: Implement the Plan and Reassess the Process and Plan

Implementation of the plan will depend on the schedule, assigned responsibilities, and defined outcomes established in step 1. The results of the plan must be evaluated in order to determine if the desired outcomes were achieved (Bryson and Alston, 2011 p 9-10).

Step 3: Plan the Process

Once the evaluation is complete, CFS board and staff must decide what strategic planning is needed for the 2014 fundraising event. This process includes deciding who will be involved in the plan, what will be done, and what the desired outcomes are. Once this is completed, the cycle begins again and CFS board members and staff can review the mission, mandates, and conduct an environmental analysis for the event.

Strategic Marketing & Stewardship Plan

Strategic Issue: Donor Retention

There is a very low retention rate for participants at this event. Over the past four years, donor retention has averaged only 7%. This demonstrates low stewardship capacity for this event in large part because participant info is neither kept nor tracked. This is especially concerning because the event participation trends towards attracting more new donors than returning donors which means not only is there a problem with donor retention, but there is a significant missed opportunity to engage new supporters for the organization. In a study conducted by Penelope Burk, she found that "gift averages of the remaining donors [not lost through attrition] increased by 101%" over the course of several campaigns (Burk, 2003 p. 24). Even without taking these donation increases into account, if Chess for Success could retain even 20% of new donors through other campaigns, the overall increase in funding would be significant (Burk, 2003).
As the event becomes a stronger source for new donor cultivation and engagement, the event would not only net greater funding, the organization will also see an increase in donations throughout the year.

Identifying Donor Groups

Complete lists of donors from the past four events were compiled and analyzed to create donor profiles and donor groupings in order to better understand the organization's donor base, best possible approaches to donor stewardship, and to "tailor appeals and stewardship to [each] separate group" (Bray, 2010 p. 162). Working with the Development Director, five donor groups were identified: Board members, Past Board members, Friends of Board members, Sponsor connections, and Supporters, Volunteers, and Staff. Each of the participants' donation amounts, frequency, and type of activity or donation was then analyzed and the resulting information was used to create donor profiles and a strategic marketing and stewardship plan.

Key Strategic Donor Groups

This strategic marketing & stewardship plan is designed to target the key audiences that represent the greatest potential gain to the event and the organization. The participant group analysis revealed that the "sponsor connection" and "friend of board members" participant groups are the largest group and the largest gross contributors. They also represent 69% of all the participants who spent nothing at the event meaning that there is potential for even greater fundraising gains with better marketing and stewardship. The "friend of board" and "sponsor connection" participant groups are therefore, the key audiences for this event.

Strategic Goals

Short Term Goals

Marketing

1. Collect donor data to improve marketing to key participant groups
2. Increase attendance of new donors who spend in the $100- $250 range by 10%

Stewardship

1. Collect donor data to improve stewardship of key participant groups
2. Increase retention of new donors who spend in the $100- $250 range by 10%

Long Term Goals

Marketing

1. Reduce the number of new participants who spend nothing on the event by 50%
2. Increase new donors overall spending levels by 20%

Stewardship

1. Increase retention rates of new donors by 20%

Strategic Marketing & Stewardship Plan

Environmental Analysis (SWOT)

A SWOT (Strengths, Weaknesses, Opportunities, and Threats) analysis is used to "clarify conditions or situations within which an organization operates … and is a valuable prelude to identifying and framing strategic issues" that builds on the strengths of an organization (Miller, 2010 p.119).

Strengths:

CFS has many strong connections to large companies and influential community members with a high capacity for donations that are very active in supporting their work.

Weaknesses:

The key audiences are are not as present on social media or other online sources. This makes communicating and marketing more challenging since traditional marketing avenues are typically more expensive. Additionally, the marketing must be very carefully and narrowly focused to target individuals with capacity to spend $500 - $1,000 at a benefit auction making more conventional avenues as well as free avenues of advertising unhelpful. To reach the target audience, there must be a high level on one-on-one interface and communication. This means the marketing strategies rely heavily on the board, committee, and supporters. This once-removed nature of marketing makes the process much more delicate and difficult to manage.

Stewarding this group is also more challenging due to the fact that the process by which names of participants were added to the event was chaotic and haphazard; there is a critical need for better data collection efforts. Although the development director set a deadline and a process by which to add names, this was ignored and names were added right up to the last minute. This meant that there was no contact info or data about how the participant was invited or whom they were connected to for over ¾ of all participants. Without accurate data and contact info from participants, not only is it impossible to improve and grow the event, but also impossible to conduct donor appreciation.

Opportunities:

Although tracking donor contact info and data is a significant weakness of the current system, it is an easy problem to fix. There are a few simple ways to improve tracking and thus dramatically increase the reach of marketing efforts to the target audience and stewardship capacity for greater donor retention.

Threats:

Total reliance on board members means that losing connection to any board member or other primary contact person for these participant groups will result in losing contact with a large pool of potential donors. Additionally, CFS could find that low levels of stewardship results in fewer donors willing to return and fewer new donors interested in engaging with the organization.

Defining Donor Groups

The donor profiles based on participant groups focus specifically on higher level donors because one of the strategic goals of this event was to attract and engage donors with high capacity in order to host a smaller event with fewer costs.

Strategic Marketing & Stewardship Plan

Donor Groups Defined and Described				
Donor Group	**Current & Past Board Members**	**Friends of Board Members**	**Sponsorship & Corporate Connections**	**Volunteers, Coaches, & Long-Time Supporters**
Group Definition	This group is defined as any individual holding a board member position when the event took place. AND Any individual who previously held a board member position or was a founder when the event took place.	This group is defined as any individual who first heard about the event and came or continues to come because they are a personal friend of an individual who holds or has held a board member position when the event took place.	This group is defined as any individual who first heard about the event and came or continues to come through their employer, business partner, business contact, or colleague when the event took place.	This group is defined as any individual who first heard about the event and came or continues to come because they are already connected to the organization or they volunteer or volunteers for the organization when the event took place.
Demographic Description	They are primarily high-level business executives, business owners and in one case a New York Times best seller author. Few of them have a huge online presence and are not in the demographic that typically uses social media.	Tend to be older individuals who are socially minded and group oriented. These individuals are personal friends and connections of board members and many have a higher capacity for donations. They are often personal supporters of education and are part of larger corporations and elite Portland society.	Vary widely in age but tend to have more capacity and disposable income. They are not already connected to the work of the organization but likely have an interest in families, education and children.	These individuals are likely to be educators, parents, or grand parents.
Relationships	They are very influential in their community circles. Some for their significant financial resources and some for their relative fame and large public sphere of influence. Many have been highly involved in the organization since the beginning and many of the participants are friends or followers of theirs.	They want to support their friends, to engage in a social environment, & to give back to their community. Although they range in socio-economic levels, they are often very family oriented.	They are most likely business executives. They are likely to be busy and not to engage in, nor come across the organization through casual contact.	Most likely connected to the schools and families of the children being served by the organization - CFS programming, school connections and community organizations whose spheres of influence touch CFS.

Strategic Marketing & Stewardship Plan

Marketing Strategy

Purpose

A strong marketing plan is essential to capturing the attention of new donors. Marketing provides name recognition, brand image, and communicates the mission of purpose of an organization. Marketing is how uniformed donors become informed and engaged supporters. (Burke, 2003). The purpose of this marketing plan is to help guide future event planners to achieve the goals of the fundraising event by identifying key strategic audiences, the methods and messages to use to reach these audiences, and the metrics by which to measure achievement of marketing goals.

Implementation

Commit to a Plan:

Connecting the target audience with the organization requires a commitment to a marketing strategy. Leadership in the organization needs to commit some amount of budget and time resources and intention to reaching the target audience. This may include getting professional marketing support from sponsors and supporters. Many of the corporate sponsors are likely to have a marketing department that could act as consultant and partner in marketing efforts.

Setting a Schedule & Defining Roles & Responsibilities:

Having a clear set of steps for marketing leading up to the event that the committee, board, and staff each have a responsibility for can make efforts far more successful in the short term. See **Appendix C** for an example of a marketing schedule.

Getting the Word Out

The development director and ED can work with the board and committee to identify venues to share information about the organization and the event where the target audience is likely to be and open to hearing the message. Examples of this include coordinating with corporate sponsors to do co-marketing and posting to the Portland Business Alliance community events page.

Set the Tone

It is essential to set the tone of the event before saying a single word about it. By creating an elegant and sophisticated design, it is possible to convey to the target audience that the event will be a classy, elegant affair.

Deciding on a theme and a design for invitations, signs, and other marketing materials first will help set the tone and allow organizers to communicate to the target audience that this is an event worth paying attention to. See **Appendix C** for an example of theme, design, and packaging.

Supporting Materials:

Creating supporting materials that include talking points for the organization and the event will make it much easier to involve supporters effectively in marketing efforts. An example of this is an info packet for sponsor contacts and supporters to help find the right attendees. See **Appendix C** for an example of a marketing packet.

Strategic Marketing & Stewardship Plan

Collect & Evaluate Participant Data:

Improvements to both short term and long term success can be made by collecting & evaluating participant data to determine how target audiences are getting invited in order to reach these individuals better, determine what activities each group participates in most in order to market these activities to these groups, and track what kinds of feedback participants groups give in order to improve long-term stewardship and engagement efforts.

Messaging

Since most of the target demographic is unreachable by CFS through traditional marketing strategies which are time consuming and expensive, CFS must rely on supporters, sponsors, and board members to reach their audience. This can be made easier and more successful by spending establishing a marketing plan. Identifying the messages that will resonate with each participant group and the methods by which they will best receive these messages is essential to an effective marketing plan.

Donor Group Marketing Messages and Strategies				
Donor Group	**Current & Past Board Members**	**Friends of Board Members**	**Sponsorship & Corporate Connections**	**Volunteers, Coaches, & Long-Time Supporters**
How to Reach Individuals in Each Group	Phone calls and lunch meetings are the best route to go. They tend to be very strong personalities with strong opinions but little time or inclination for organization or logistical work. Keeping interactions focused and action items limited to larger decisions seems helpful	Messages should come from their friends (board members)	Messages should come from sponsor and friend or board connections via email, flier, and other communications methods used internally at each company	Messages should come through the CFS programming, school connections and community organizations whose spheres of influence touch CFS.
Messaging that Resonates	Emphasize how their support helps the organization. Convey factual data about the positive impact the organization has on the families it serves.	Emphasize how their support helps children and families and how fun and social the event will be. Convey factual data about the positive impact the organization has on the families it serves.	Emphasize the social aspects of the event and that highlight the fact that their peers are involved. Convey factual data about the positive impact the organization has on the families it serves.	Emphasize how their support helps children, families, and communities. Convey factual data about the positive impact the organization has on the families it serves.

Strategic Marketing & Stewardship Plan

Stewardship Strategy

Purpose

The purpose of this Stewardship plan is to increase the retention of new donors from the "Knight to Remember" annual fundraising event. "Stewardship is the most important practice in the development process. It secures donors for the future as it honors their impact on the present" (Sprinkel Grace, 2005 p. 156). The very first principle of stewardship is to "begin involving donors in the stewardship program with their very first gift" (Sprinkel Grace, 2005 p. 146). This means that each participant is part of the plan, no matter what their initial donation amount is.

Implementation

Collect Participant Data

Without accurate data and contact info from participants, not only is it impossible to improve and grow the event, it is also impossible to conduct donor appreciation. By collecting and analyzing data, CFS will be able to retain and engage donors for greater fundraising success. Critical data can be collected and sorted using the recommended collection tools.

Calling Card Data:

This is a tool for collecting participant data aimed at individuals who came as a guest of sponsoring corporations and board members who are not otherwise in the CFS donor database. It also asks for information about what they enjoyed and what they would change. See **Appendix B** for the Calling Card sample.

Survey Data:

This is a tool for collecting data from all participants that asks for information about their connection to the organization, what they value about the event, what they would change, and what they value most about the organization. See **Appendix B** for survey example.

Analyze Collected Data

Once data is collected, organizing the data by participant group is essential to understanding the feedback. Each group has different needs and interests and is likely to participate in different aspects of the event. By sorting the feedback by participant group, it will be possible to make sense of the feedback and then begin to implement necessary changes.

Organize Donor Activity by Participant Group

Using the data collected from the Greater Giving database and the calling cards, organize donor data in four steps.

1. Sort donors by participant group
2. Sort donors within each participant group by type of event activity they participated in
3. Sort donors participation in each activity by the amount they spent
4. Create a sub-group within each participant group for donors who spent nothing at the event

Send out the Survey

Using the data collected from the Greater Giving database and the calling cards, compile emails and send out the survey. Add the survey data collected to the donor data sorted in the previous step.

Survey Form Link for Participants:
https://docs.google.com/forms/d/1lFtX8lPR12N8XjRbx14qWpieiVdu76J62jnmk0KzOKQ/viewform

Survey Form Link for Editing:
https://docs.google.com/forms/d/1lFtX8lPR12N8XjRbx14qWpieiVdu76J62jnmk0KzOKQ/viewform

Survey Data Sheet Link:
https://docs.google.com/spreadsheet/ccc?key=0At2RXdtwC7UWdFBOb3RmVFZscFk2MEh2bXEyTXlEa2c&usp=sharing

Analyze the Donor Data

Using the collected and organized data, examine each participant group's collected information to answer the following questions.

1. How were most participants in each group invited?
2. Why did most participants say they decided to attend the event?
3. What event activities did most participants do? (i.e. Wine Wall, Dessert Dash)
4. How much did participants spend on average across their specific group over all and at each activity?
5. How much did participants spend as a group overall and at each activity?
6. What did most participants say they liked most?
7. What did most participants say they would change?
8. How many participants said they would like to attend the event again?
9. How many participants spent nothing at the event?

Update Marketing & Stewardship Materials

Use the answers from the analysis of donor data to draw conclusions about each participant group and then to update the marketing and stewardship plan for future use. The simplest way to do this is to use the tables provided in this document as a foundation for organizing the relevant information. From the updated tables complete with relevant information, it will be possible to develop more accurate messages, marketing strategies, and stewardship plans.

Donor Appreciation

Send a "Thank You" & Provide Meaningful Information

It is essential to follow up with a thank you to each and every participant, whether they spent any money at the event or not. For donors who spent any amount at the event, it is important to provide information about how their donation is being put to work. A study by Burke revealed that "the vast majority of donors said that although recognition is appreciated, what they really wanted was more meaningful information and, if they got it, they would continue to give" (Burke, 2003 p. 10). It is important that the follow up thank you does not include any further donation requests.

It is a good idea to get each participant's permission to contact him or her again with information or a newsletter about the organization. If donors indicate on the calling card or in the survey that they are willing to be contacts, add these individuals to the newsletter and include them in future fundraising efforts.

Donor Group Stewardship Plan				
Donor Group	**Current & Past Board Members**	**Friends of Board Members**	**Sponsorship & Corporate Connections**	**Volunteers, Coaches, & Long-Time Supporters**
Meaningful Stewardship & Engagement	Acknowledge their specific expertise and using those skills as well as specific appreciation for their past contributions in ways that highlight how they have impacted their community	Acknowledging their contributions in ways that highlight how they have impacted their community It is especially important to send this group information about how their donation is being used because they are not already highly connected to the organization - hearing this could increase their feeling of connection and willing ness to support the organization.	Acknowledging their contributions in ways that highlight how they have impacted their community It is especially important to send this group information about how their donation is being used because they are not already highly connected to the organization - hearing this could increase their feeling of connection and willing ness to support the organization.	Acknowledging their past contributions and ensuring they see and hear how they have impacted their community is essential to long-term stewardship. It is especially important to acknowledge this group's past contributions in the form of time as well as money.

Sources

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