

# BRAND PLAN

## UNITED WAY



Griffin Titan  
Aayush Singh  
Lauren Sliger  
Clement Theodore William Carey  
Kevika Sharma

## Table of Contents:

Sr. No.	Particulars	Page Number
1.1	Document Overview	4
1.2	Mission	8
1.3	Goals	10
2.1	Customer Needs and Wants	13
2.2	Customer Experience Narrative	16
2.3	Customer Choice Stages	19
2.4	Customer Touch Point	24
2.5	Customer Marketing Activities	27
2.6	Company Overview	30
2.7	Competitor Overview	32
3.1	Target Customer Profile	37
3.2	Value Proposition	42
3.3	Three Circles of Brand Positioning	44
3.4	Perceptual Mapping	49
3.5	Brand Mantra	53
3.6	Hierarchical Values Map	55
3.7	Brand Resonance Pyramid	60
3.8	Brand Portfolio	63
4.1	Brand Personality	67
4.2	Brand Name	71
4.3	Brand Logo	74
4.4	Brand Trademarks	77
4.5	Brand Soundmarks	79

4.6	Brand Character	81
4.7	Brand Colors	84
4.8	Brand Typography	89
5.1	Brand Equity Index	92
5.2	Goal #1 Measurement	95
F.1	MarCom Table	97
F.2	MarCom Schedule	103



## 1.1 Document Overview

---

### **Introduction:**

This document summarizes the marketing plan designed for United Way of Greater Lafayette. It is a strategy guide for marketing teams and stakeholders, detailing the organization's key marketing strategies targeted at engaging the local community, boosting donations, and encouraging volunteers. The overview is intended to offer rapid access to critical information, helping decision-making and planning for current and future campaigns.

The marketing strategy aligns with United Way's objective of mobilizing community resources to solve local needs in education, health, and financial security. Marketing teams, executives, and external partners can utilize this document to guarantee alignment with strategy objectives and stakeholder expectations.

### **Executive Summary:**

The United Way of Greater Lafayette is a major nonprofit organization dedicated to improving the lives of local residents by tackling critical issues such as education, financial stability, and health. For decades, United Way has organized resources and formed partnerships to address some of the most critical concerns in the Greater Lafayette area. United Way works to achieve quantifiable, long-term change via a strong network of contributors, volunteers, and community partners.

This executive brief gives an overview of the United Way's marketing strategy, which focuses on community engagement, donor participation, and volunteers. Through a combination of conventional and digital marketing activities, United Way hopes to grow its reach, promote engagement in its programs, and maintain its purpose of enabling individuals and families to create better lives.

### **Document's Purpose and Use:**

The document consolidates the United Way of Greater Lafayette's core marketing activities, target audience data, and promotional strategies. Its goal is to streamline marketing processes, improve stakeholder knowledge, and offer actionable insights that support United Way's mission. This overview will be used by:

- Marketing Teams: To integrate everyday activities with overall strategy objectives.
- Executives: Assess the efficacy of current methods and allocate resources efficiently.

- External Partners: To ensure that engagements are consistent with United Way's purpose and marketing objectives.

### **Organizational Structure of the Document Sections:**

- Executive Summary: The executive summary provides a succinct outline of the marketing strategy, including goals, target audience, and value proposition.
- Market Analysis: Provides information on the target audience, competitive landscape, and SWOT analysis.
- Marketing Strategy: Marketing strategy describes strategic efforts and positioning.
- Tactical Plan: Breaks down various marketing initiatives, such as product, pricing, promotion, and location.

### **Flow:**

The document is organized from high-level strategies to tactical activities.

- The Executive Summary introduces the marketing strategy.
- The Market Analysis offers context for external market factors and competitors.
- The Marketing Strategy establishes United Way's brand position and strategic direction.
- The Tactical Plan specifies specific measures, ranging from internet marketing to community activities.

### **Important Terminology:**

- Target Audience: The target audience is mid-career professionals (25-44), young adults (20-25) and retirees (55+) who appreciate transparency and community participation.
- Value Proposition: The United Way's pledge of openness and comprehensive community solutions for education, health, and financial stability.
- Market Segmentation: Market segmentation is the division of a market based on factors like age, wealth, or behavior (for example, younger contributors who prefer digital involvement).
- ROI (Return on Investment): ROI (Return on Investment) is a financial return-based metric used to evaluate the efficacy of marketing efforts.
- Customer Journey: The complete interaction a contributor or volunteer has with United Way, from awareness to participation in initiatives.

**Target Audience:** United Way targets two main segments:

- Mid-career professionals (25-44): This tech-savvy demographic engages through digital channels and prefers clear, quantifiable results.
- Retirees (55 years or older) This group is well-known for its active community participation, and they cherish recognition and long-term contributions to legacy projects.

### **Value Proposition:**

United Way's primary value proposition focuses on trust and openness. The organization distinguishes itself by providing complete community solutions and ensuring that donor money is used efficiently to enhance lives locally.

### **Market Offering: 4Ps**

- Product: United Way provides community-focused initiatives in education, financial stability, and health, resulting in quantifiable outcomes that enhance the quality of life in the region.
- Price: Donations are flexible, allowing either regular little donations or larger legacy gifts, making donating accessible to people of all income levels.
- Promotions: United Way engages their target audience with digital marketing, social media campaigns, and event-driven promotions, such as the Run United 5K. Email marketing and crowdfunding sites are being utilized to recruit younger, more tech-savvy contributors.
- Place: The organization primarily serves the Greater Lafayette region and provides in-person and online interaction opportunities through events and digital platforms.

### **Analysis: Key Facts and Findings.**

### **Market insights:**

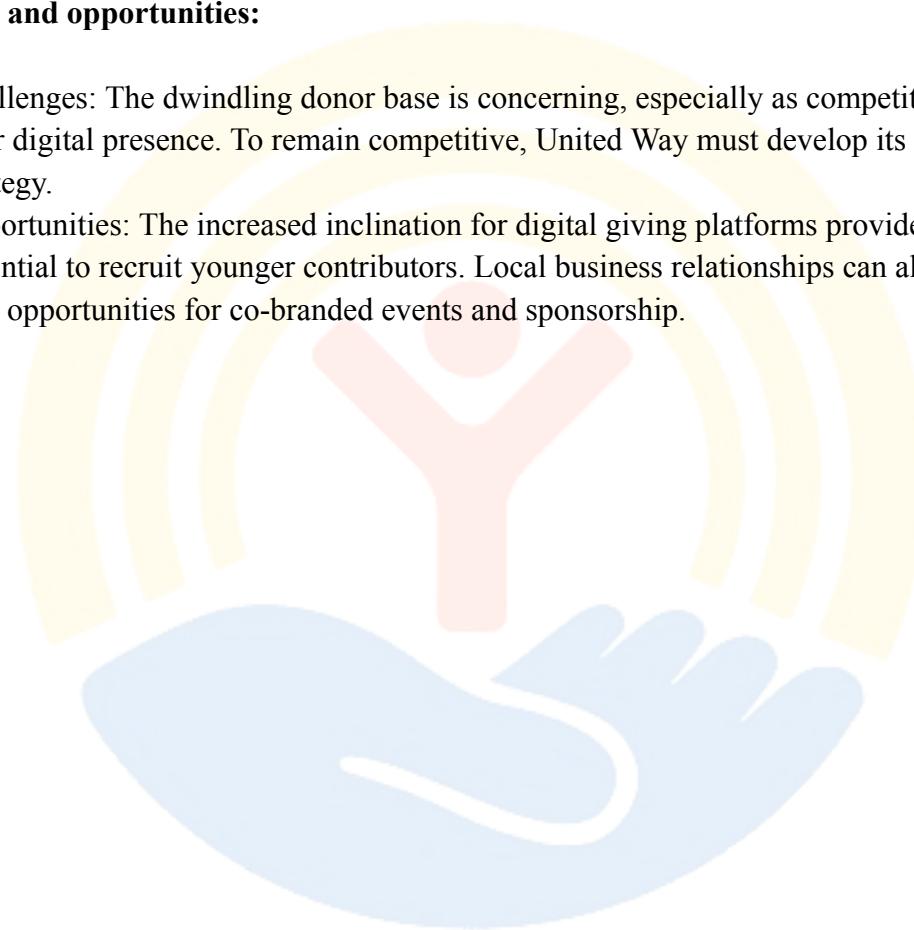
- Digital Engagement: Younger contributors (18-35) favor digital giving channels, particularly mobile and crowdfunding alternatives.
- Local Partnerships: Collaborating with local companies has the potential to significantly increase United Way's community reach.

## **Performance metrics:**

- Donor Growth: The aim is to increase the donor base by 5% by 2025, with a particular emphasis on maintaining 75% of current contributors.
- Event Participation: Aims to improve community involvement through significant events like the Run United 5K, with the goal of increasing participation by 10%.
- Digital Engagement: Important indicators include Click-Through Rate (CTR), conversion rates, and donation amounts from digital initiatives.

## **Challenges and opportunities:**

- Challenges: The dwindling donor base is concerning, especially as competitors expand their digital presence. To remain competitive, United Way must develop its own digital strategy.
- Opportunities: The increased inclination for digital giving platforms provide a significant potential to recruit younger contributors. Local business relationships can also open up new opportunities for co-branded events and sponsorship.



## 1.2 Mission Statement

---

### Introduction:

A nonprofit's mission statement is a dynamic and purpose-driven proclamation that encapsulates the organization's commitment to creating positive social change. It not only articulates the nonprofit's core objectives and values but also serves as a rallying cry for community engagement, innovation, and measurable impact. This forward-thinking declaration adapts to emerging needs while remaining a powerful tool for alignment, motivation, and external communication.

### Framework:

**“Mobilizing our community to improve lives.”**

### Analysis:

The mission statement "Mobilizing our community to improve lives" is effective because it is clear, actionable, and inspiring. It conveys a sense of collective effort and purpose, emphasizing both community involvement and positive outcomes.

"Mobilizing" conveys a sense of active, ongoing engagement, positioning United Way as a catalyst for collective efforts that lead to meaningful change. With this, United Way conveys a sense of urgency and coordination, showing that it's proactively rallying resources and people. "Community" then highlights inclusivity, grounding the mission in local, collective efforts. Next, "to improve lives" is broad and inclusive, allowing the organization to address various societal challenges while maintaining a clear and compelling goal. Within that, the focus on "improve" reinforces the commitment to creating positive change and bettering conditions. At the same time, "lives" personalizes the mission, ensuring it remains human-centered, focusing on enhancing individuals' well-being and quality of life. Together, these words communicate a powerful, purpose-driven vision.

**Cause:** United Way of Greater Lafayette's mission is to mobilize the community to address immediate needs such as poverty, education, health, and financial stability. Through signature programs like Read to Succeed, VITA, and K-Camp, as well as collaborations with partners such as Purdue United Way, they tackle critical social challenges with the goal of empowering every individual in the community to thrive from cradle to career.

**Impact:** The organization strives to create lasting improvements in individuals' lives by enhancing access to education, healthcare, and financial stability. Their initiatives foster a community where children are prepared for school, adults lead healthy and stable lives, and everyone has the opportunity to contribute to and benefit from a stronger, more resilient community.

**Action:** United Way of Greater Lafayette emphasizes community engagement through events such as the Run United 5K and LEC Golf Outing. They bring together volunteers, donors, and organizations to collectively tackle local challenges. Their Volunteer Engagement Center offers a central hub for people to find ways to give back across a variety of sectors, further amplifying their impact by fostering broad-based community involvement.

### **Recommendations:**

A new mission statement might be unnecessary because this one already encapsulates the essence of fostering community engagement and making a difference. It provides a broad, adaptable framework that can guide diverse initiatives and align with various goals, ensuring focus and unity in efforts to enhance lives.

### **References:**

<https://www.bridgespan.org/insights/mission-and-vision-statements#:~:text=Gather%20input%20from%20board%2C%20staff,make%20change%20in%20the%20world.>

<https://www.springly.org/en-us/blog/writing-your-nonprofits-mission-statement/>

<https://nonprofithub.org/nonprofit-mission-statements-good-and-bad-examples/>

<https://uwrlafayette.org/cradle-to-career/#kcamp>

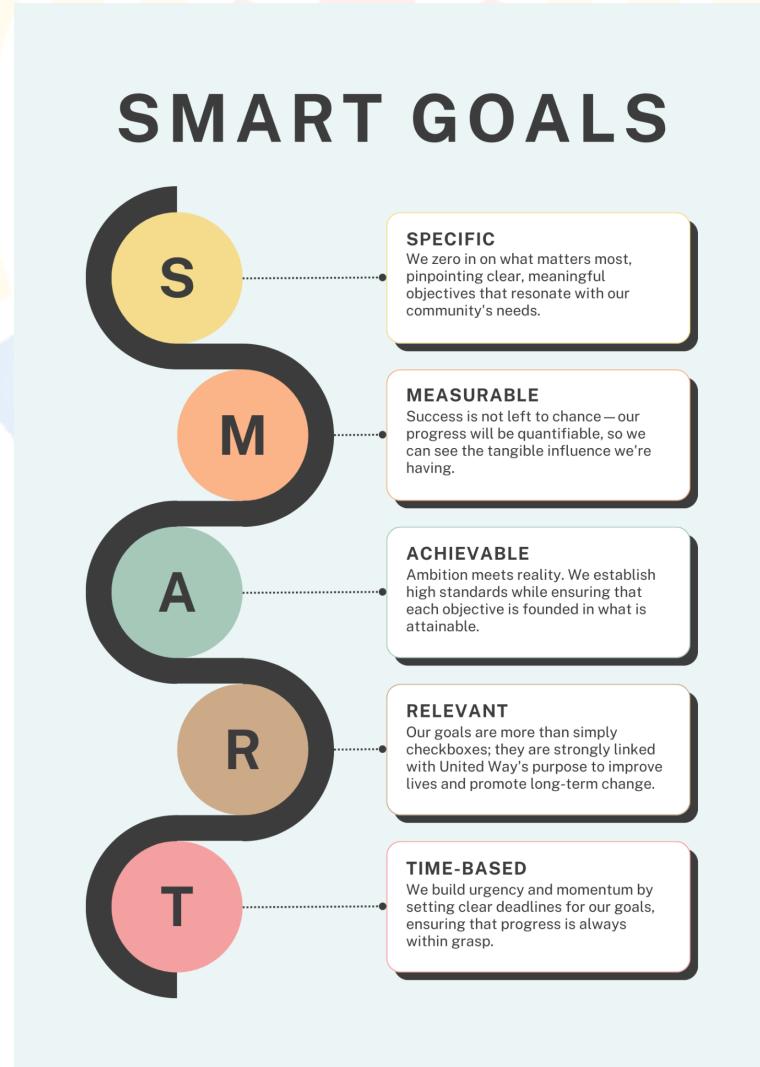
## 1.3 Goals

### Introduction:

In a dynamic world where meaningful change necessitates more than just vision, it's critical that our objectives be more than simply dreams—they're concrete paths to achievement. As we start on the United Way brand strategy, we are not only establishing goals; we are also creating the blueprint for a better, more connected community.

### Framework:

To ensure every step we take has a purpose, we're harnessing the power of SMART goals. The acronym SMART stands for Specific, Measurable, Achievable, Relevant, and Time-bound. These goals go beyond vague aspirations, providing us with a precise, results-driven framework.



## **SMART Goals:**

1. 5% increase in the number of individual donors by December 2025.
2. Retain a minimum of 75% of existing donors by December 2025.

## **Analysis:**

Provide context and detail for the recommended SMART goals that we listed (a.k.a. Why are they our goals)

### Goal One:

Context and Rationale: Since 2019, United Way has experienced a concerning drop in the number of donors, from 16,000 to approximately 8,000. Despite the dollar amount of donations remaining steady, the reduction in donor numbers poses a risk to long-term financial stability. The decrease in the donor base threatens future donation levels, which could decline as existing donors age or disengage.

To counteract this trend and ensure sustainable growth, it is essential to focus on increasing the number of donors. A goal of increasing the donor base by 5% by December 2025 addresses this need. Achieving this target will not only help UWGL maintain its current donation levels but also provide a buffer against potential decreases in per-donor contributions due to inflation or economic inflation.

### Goal Two:

Context and Rationale: The significant decline in donors from 16,000 in 2019 to 8,000 in 2024 indicates an average annual loss of approximately 1,600 donors. Retaining existing donors is critical, as it is generally more cost-effective to retain current donors than to acquire new ones. High donor retention rates are crucial for building long-term relationships and ensuring consistent support.

A retention goal of 75% serves as a realistic benchmark, given the historical data. This goal emphasizes the importance of not only acquiring new donors but also maintaining strong relationships with current supporters. By focusing on retention, United Way can stabilize its donor base, reduce the risk of future declines, and foster a more reliable source of ongoing contributions.

## **Recommendations:**

**Enhance Donor Acquisition Strategies:** Develop targeted marketing campaigns and leverage data analytics to attract new donors. Utilize insights from psychographic and demographic analyses to tailor outreach efforts, particularly focusing on engaging tech-savvy mid-career professionals and leveraging social influence. Additionally, invest in digital platforms and social media to increase visibility and attract a broader audience.

**Strengthen Donor Retention Programs:** Implement comprehensive retention strategies that emphasize regular, personalized communication with existing donors. Utilize transparency and clarity in reporting the impact of donations, addressing the needs of both Millennials and Baby Boomers. Establish programs that recognize and reward loyal donors and create opportunities for meaningful engagement to reinforce their connection with United Way's mission.

**Align Strategic and Operational Goals:** While focusing on increasing donor numbers and improving retention, United Way must also align its strategic objectives with long-term organizational goals. This includes fostering internal alignment and ensuring that all efforts support the broader vision of the organization. Regularly review and adjust strategic goals to reflect evolving community needs and organizational priorities.

## **References:**

<https://www.guidestar.org/profile/shared/6040de76-4f76-4acc-b60b-6545b601fcc6>

<https://uwlfayette.org/>

## 2.1 Customer Needs and Wants

---

### Introduction:

In marketing, *needs* refer to essential requirements or motivation behind a customer's decision-making process (physical and psychological). On the other hand, *wants* are desires shaped by culture, society, and individual personality. Addressing both is crucial in crafting effective marketing strategies.

For United Way, understanding these factors helps tailor communication, campaigns, and engagement strategies to align with what drives their donors. This alignment is crucial for sustaining and growing donor relationships.

### Framework:

Ten important target donor needs for United Way of Greater Lafayette:

- 1) **Transparency:**
  - a) Donors need transparent, accessible financial reporting to ensure their funds are used effectively.
- 2) **Impact:**
  - a) Donors seek evidence that their contributions lead to tangible community improvements in education and health.
- 3) **Accountability:**
  - a) Ensure that United Way is responsible and ethical in managing donations.
- 4) **Recognition:**
  - a) Donors want acknowledgment to feel valued and appreciated for their support.
- 5) **Engagement:**
  - a) Opportunities to be actively involved in community events and volunteer efforts.
- 6) **Personal Connection:**
  - a) Donors must feel emotionally connected to the cause, which drives continued support.
- 7) **Long-term Change:**
  - a) Donors are interested in supporting initiatives that offer sustainable, long-term community solutions.
- 8) **Feedback:**
  - a) Regular updates on their donations' impact and ensuring that they stay informed and engaged.
- 9) **Community Trust:**

- a) Assurance that United Way is a respected and trusted organization within the local community.

**10) Ease of Contribution:**

- a) Simple, accessible methods for donating, ensuring convenience and encouraging repeat contributions.

In terms of United Way's donors, here are what we believe are their three most critical target wants and needs based on previous conversations with the organization as well as extensive research:

Needs	Wants
<ul style="list-style-type: none"> <li>● Donors may seek to contribute to <b>impactful, transparent, and well-managed programs</b> that address urgent community issues such as education, financial stability, and health</li> </ul>	<ul style="list-style-type: none"> <li>● They likely desire <b>recognition</b>, a sense of <b>community involvement</b>, and assurance that their contributions <b>make a difference</b></li> </ul>

**Analysis:**

Regarding needs, contributing to “impactful, transparent, and well-managed programs” is quite broad and can point to many different programs. Specifically analyzing each aspect of said program, we mean the following:

- **Impactful Programs:** Donors expect their contributions to support programs that yield measurable, positive outcomes. United Way can meet this need by highlighting the tangible impacts of its initiatives in areas such as education, financial stability, and health. This builds trust and reinforces the organization's credibility.
- **Transparency:** Donors want to know how their money is spent. United Way does an excellent job of this by providing detailed financial reports and showing the allocation of funds. Regular updates and open communication channels can also fulfill this need, ensuring donors feel informed and confident in their contributions.
- **Well-Managed Programs:** Donors seek assurance that the programs they support are managed efficiently and effectively. United Way can emphasize its expertise and operational efficiency by highlighting partnerships, showcasing a successful project management track record, and sharing strategic planning efforts.

Furthermore, an analysis of the implications of the “wants” section follows:

- **Recognition:** Donors often appreciate public acknowledgment of their contributions through various levels of recognition, such as featuring donors in newsletters, on the website, or at events. Personalized thank-you notes and donor recognition programs can enhance their experience and foster long-term loyalty.
- **Sense of Community Involvement:** Many donors desire to be actively involved in their community. Creating a community-centric narrative in marketing materials can strengthen donors' emotional connection with the cause.
- **Assurance of Contribution Impact:** Donors want to feel that their contributions make a meaningful difference through impact reports, stories of beneficiaries, and visual content like videos and infographics.

### **Recommendations:**

United Way's ability to market effectively hinges on its understanding of and ability to address these needs and wants. By aligning marketing strategies with these insights, United Way can:

- **Enhance Donor Engagement:** Tailor messaging to reflect the transparency, impact, and recognition that donors value.
- **Build Trust and Credibility:** Use data and storytelling to demonstrate program success and financial integrity.
- **Foster Long-Term Relationships:** Create a sense of community and belonging through recognition and local involvement opportunities.

By focusing on these areas, United Way can strengthen its donor base, attract new supporters, and ensure long-term program sustainability.

### **References:**

<https://uwlfayette.org/>

<https://www.indeed.com/career-advice/career-development/understand-the-customer-needs>

<https://proechosolutions.com/understanding-your-customers/>

<https://www.wfpusa.org/articles/why-americans-donate-what-motivates-people-to-give-and-what-causes-do-they-give-to/>

<https://www.charitylink.net/blog/reasons-people-give-to-charity>

## 2.2 Customer Experience Narrative

---

### Introduction:

A customer experience narrative is an effective tool for mapping out the path of a target customer as they engage with a company's services. This third-person narrative focuses on essential requirements, actions, and decision points that affect the customer's experience. For United Way of Greater Lafayette, this narrative helps them to understand how their community-focused programs resonate with the target audience and where they can enhance our engagement strategies to better serve them. Analyzing this journey allows them to make educated business decisions that not only meet current demands but also create long-term community support and growth.

### Framework:

#### Jane's Journey with “Read to Succeed”

Jane is a long-time resident of Greater Lafayette, working as a marketing manager at a local firm. Passionate about education and literacy, she has always sought ways to give back to her community. When she first heard about United Way’s Read to Succeed program, she was immediately intrigued by the opportunity to make a tangible difference in the lives of young students.

After a bit of research, Jane learned that the program was designed to improve literacy skills in local classrooms by having volunteers, like herself, spend one hour per week reading with students. The simplicity of the commitment appealed to her busy schedule, but what truly drew her in was the potential to impact the future workforce by helping students succeed academically.

Jane decided to sign up for the program. The process was smooth, with easy-to-follow instructions on the United Way website and prompt communication from program coordinators. Before her first day, she received a brief training session, which equipped her with strategies to engage students and foster a love for reading.

On her first visit to the classroom, Jane felt a mix of excitement and nervousness. The children, initially shy, quickly warmed up to her as she read a story about adventure and friendship. Week after week, Jane noticed the same students becoming more confident in their reading skills. One student, in particular, Sarah, who struggled with reading at the beginning of the program, was now eagerly reading along with Jane, her eyes bright with achievement.

Jane's experience with the program was fulfilling on multiple levels. Not only did she feel that she was making a difference in Sarah's life, but she also experienced personal growth, gaining a deeper connection with her community.

### **Analysis:**

Critical Needs:

- Consistency and Reliability: The Read to Succeed program addresses Jane's demand for a dependable volunteer option that works around her hectic schedule. The one-hour commitment each week is reasonable, allowing her to contribute without feeling overwhelmed.
- Impactful Engagement: The program addresses Jane's desire to have a significant influence. Seeing Sarah's improvement increases Jane's dedication and happiness, giving her a feeling of purpose and fulfillment.
- Community Connection: The curriculum also addresses Jane's need for a stronger connection to her community. By interacting with local youngsters, she feels more connected to the community of Greater Lafayette.

Behavioral insights:

- Decision Points: The program's objective was simple and clear, which encouraged Jane's choice to volunteer. The simple sign-up procedure and supporting messages were vital to her commitment.
- Ongoing Engagement: Jane's prolonged involvement was motivated by the evident influence she made on the pupils. The accomplishments of students like Sarah inspired her to continue participating and even advocate for the program among her classmates.

### **Recommendations:**

- Enhance Volunteer Support: While preliminary training was helpful, equipping volunteers with continuous tools and advanced tactics might help them make a bigger difference and stay motivated.
- Highlight Success tales: Sharing additional tales like Jane and Sarah's may be an effective technique for attracting new volunteers. These tales should be highlighted in marketing materials and social media efforts.
- Create a Volunteer Community: Creating a forum or frequent gatherings for volunteers may enhance their connection to the program and develop a feeling of community, resulting in increased retention.

**References:**

<https://koreascience.kr/article/JAKO201806352375439.page>  
<https://link.springer.com/article/10.1057/bm.2012.15>



## 2.3 Consumer Choice Stages

### Introduction:

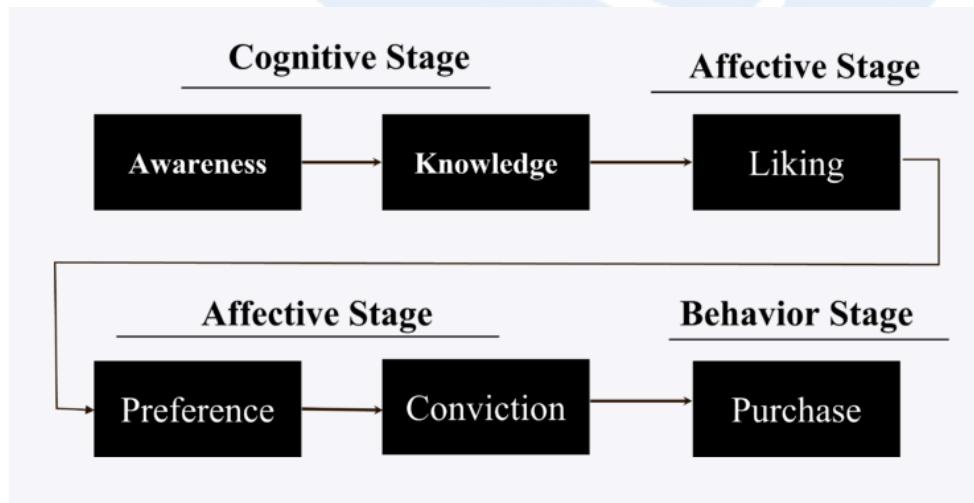
Imagine the United Way of Greater Lafayette focused its efforts on strengthening neighborhood ties. People in the community come to grasp the need for societal change and know that they can help make it happen by supporting the United Way. They begin to look for methods to contribute, gathering information about United Way projects and their impact. As they consider their alternatives, their desire to make a difference gets greater, and they decide to help United Way. After making this decision, individuals see the beneficial influence of their effort and consider how they might continue to participate.

This narrative reflects the consumer choice stages, which United Way of Greater Lafayette can leverage to strengthen its donor engagement strategies.

The donor decision-making process is quite similar to consumer behavior in commercial situations. Recognizing this, United Way of Greater Lafayette should intend to have a better knowledge of these stages in order to improve involvement methods. By linking their programs with the consumer choice process, United Way may deepen its community connections, assuring continued support for its mission to better lives and build a stronger Greater Lafayette.

### Framework:

The consumer choice process is commonly divided into five stages: problem recognition, information search, alternative evaluation, purchase decision, and post-purchase behavior. Each step is an opportunity for United Way of Greater Lafayette to improve its donor engagement.



## Problem Recognition

- Concept: Donors must first recognize that there is a societal issue they are concerned about and wish to help. The United Way's goal is to facilitate this recognition by successfully conveying the needs of the Greater Lafayette community.
- Strategy: We recommend establishing focused campaigns that highlight crucial concerns in the community. These efforts should go beyond traditional appeals, using immersive storytelling approaches like interactive webinars or neighborhood visits to show potential contributors the effect of these issues directly. By telling captivating stories of local families and people who have benefitted from United Way initiatives, the organization can foster an emotional connection that makes the problem more palpable and urgent. Furthermore, incorporating data-driven insights to emphasize the precise impact areas most important to each donor can help to tailor and improve this step.

## Information Search

- Concept: After identifying an issue, potential contributors will look for information on how they may help to solve it. At this step, the United Way must give thorough and easily accessible information.
- Strategy: We advocate upgrading the United Way of Greater Lafayette's internet presence into a vibrant, interactive destination. Beyond program descriptions and effect reports, the website might include other features that allow visitors to explore virtual communities and witness the direct impact of their donations. Gamified aspects, such as quizzes that connect donors with programs based on their interests, can further enhance the information search experience. Collaborating with local influencers and thought leaders to generate material that appeals to potential contributors helps increase the reach and effect of this information.

## Evaluation of Alternatives

- Concept: At this stage, funders assess several organizations to determine where their donations will be most effective. The United Way must differentiate itself by emphasizing its distinct assets.
- Strategy: To distinguish itself in a crowded philanthropy field, we recommend the United Way of Greater Lafayette harness its strong local roots and long-standing community ties. Creating a transparent, interactive dashboard that compares United Way's impact to that of other organizations may present donors with clear, data-driven insights into how their donations will be most efficiently spent. Furthermore, providing live virtual tours of supported initiatives, where donors may engage with project leaders and recipients, can

help to strengthen the organization's trust and reliability. Highlighting real-time success stories through dynamic, multimedia material, such as podcasts including interviews with local beneficiaries, may also generate a compelling story that sets United Way apart from other organizations.

## Purchasing Decision

- Concept: This stage includes the actual choice to make a gift. The convenience and security of this procedure are crucial.
- Strategy: To make the donation process easier, we recommend building a smooth, omnichannel experience that caters to various donor preferences. This might include incorporating donation choices into local shop partners' point-of-sale systems. To inspire action, United Way might establish exclusive donor communities that provide members early access to impact reports, exclusive events, and insider information. Personalized incentives, such as naming chances for specific projects or recognition in communal places, can further increase the attraction of giving.

## Post-purchase Behavior

- Concept: After contributing, contributors consider their decision and its implications. Positive reinforcement at this point can encourage repeat donations and long-term loyalty.
- Strategy: Post-donation involvement should be about developing a long-term connection. We recommend building a donor engagement app that provides tailored material such as success stories, project updates, and invites to special events. This app might include a "Donor Journey" tracker, which would allow donors to view the ongoing impact of their donations and communicate with recipients via virtual town halls or video messaging. Furthermore, implementing a donor recognition program that uses social media to publicly acknowledge gifts can boost the contributor's sense of pride and community participation.

## **Analysis:**

Viewing the donor experience through the lens of the consumer decision process enables United Way of Greater Lafayette to strategically improve each connection. Optimizing the Problem Recognition stage using new, data-driven narratives ensures that potential donors are not only aware of community challenges, but also emotionally motivated to act.

The Information Search and Alternatives Evaluation processes are crucial for establishing trust and placing United Way as the preferred organization for effective donation. United Way may

differentiate itself in a competitive market by providing a dynamic, engaging digital experience that is both transparent and personalized.

The Post-Purchase Behavior stage offers the ability to turn transactional gifting into a long-term partnership. By consistently engaging contributors with targeted material, special experiences, and public acknowledgment, United Way can develop a stronger relationship that leads to long-term support and advocacy.

### **Recommendations:**

- Immersive and data-driven storytelling: Tactics, such as interactive webinars and community tours, can help to improve donor campaigns. Combine them with data-driven insights to make the difficulties facing the Greater Lafayette community more apparent and accessible to contributors, enhancing their emotional connection and urgency to donate.
- Interactive and Engaging Digital Presence: Make United Way of Greater Lafayette's digital platforms more engaging by adding elements like virtual neighborhood explorations and tailored quizzes. This will make the information search process more engaging, ensuring that potential donors discover relevant and compelling reasons to support the cause.
- Transparent effect Comparisons: Create a transparent, interactive dashboard that allows funders to compare the effect of United Way to that of other organizations.
- Seamless contribution Experience: Implement an omnichannel contribution procedure that involves incorporating donation choices into local companies' point-of-sale systems. Additionally, develop special donor communities that provide early access to publications and events, as well as tailored incentives, to make the giving process not just simple but lucrative.
- Ongoing Donor Engagement: After a gift, focus on developing long-term connections with contributors via a dedicated engagement tool. The app might contain a "Donor Journey" tracker, which would allow donors to follow the impact of their gifts and connect with beneficiaries, reinforcing their desire to continue donating.

### **References:**

1. Bruner, G.C., & Pomazal, R.J. (1988). *Problem Recognition: The Crucial First Stage of the Consumer Decision Process*. Journal of Services Marketing, 2(3), 43-53.
2. Kotler, P., & Keller, K.L. (2009). *Marketing Management*.
3. Kumar, R. (2010). *Marketing and Branding*.

4. Dudovskiy, J. (2024). *Consumer Decision Making Process*.
5. Solomon, M.R. (2018). *Consumer Behavior: Buying, Having, and Being*.



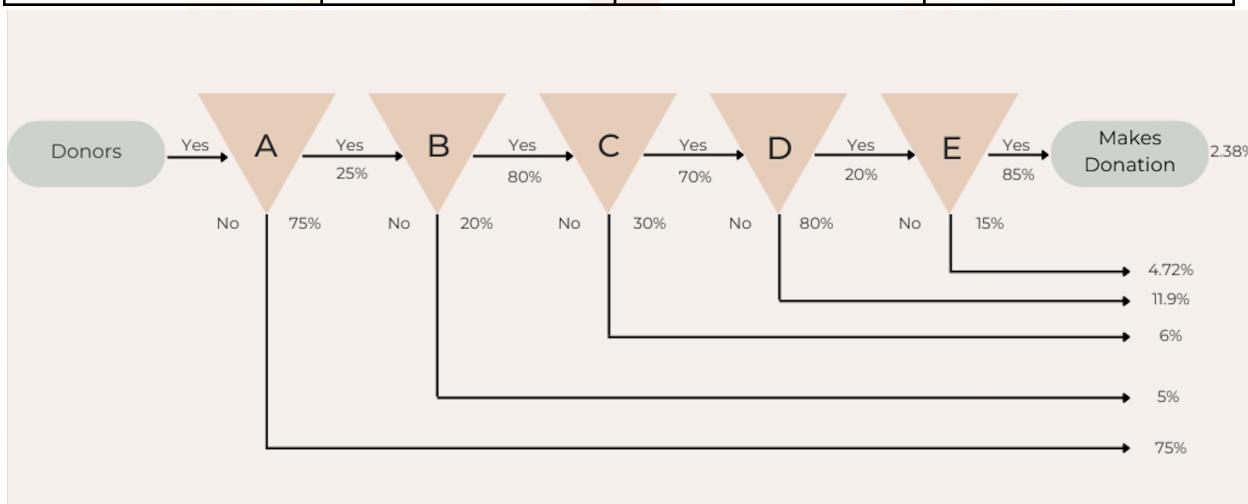
## 2.4 Activity Map and Touch Points

### Introduction:

Customer touchpoints are the heartbeat of engaging the customers and keeping the relationship warm. The various interaction points between an organization and its stakeholders, including potential and existing donors, are of paramount importance. For United Way, optimizing these touchpoints can significantly enhance donor engagement, acquisition, and retention.

### Framework:

Target Market (Profile and Need)	Cognitive (Mind)	Affect (Heart)	Behavior (Choice)
Career professionals, corporate decision-makers, empathetic individuals, community leaders and influencers, and residents in the Lafayette community	A . View the social media page, hear from word of mouth, see local advertisement B. Visits website C. Reads about partners and projects	D. Reads personal narratives and stories from people who have been positively affected E. Visit the donation page	F. Makes donation



### Analysis:

The percentages are educated estimates based on conversations with United Way's previous knowledge about donations. Point A represents a person viewing United Way's social media page, hearing about the organization from word-of-mouth advertising, or seeing a local ad. From

there, we expect 75% of people to drop off in terms of their interest in donating to the organization, and we expect 25% of people to move to Point B in the process. Point B is visiting the United Way website. Once on the website, we expect that most viewers will choose to navigate the website they just visited rather than immediately clicking off. More specifically, we expect 80% of viewers to stay on the website and read about United Way's partners and projects, the most information about their cause, and we expect the rest of the 20% to click off the website. Next, from Point B to Point C, we expect that 70% of the remaining viewers will continue to navigate the website to read the personal narratives and stories of people positively affected by the organization. We expect that the other 30% will click off of the website. After obtaining knowledge about United Way, the viewer will either click off the website or navigate to the donation page. We expect a steeper drop off here in which we expect that only 20% of the remaining viewers will click on the donation page, whereas 80% of the remaining viewers will click off the website. Lastly, of the remaining viewers who are now on the donation page, we expect that, if they have made it this far, most of them are willing to donate. Therefore, we expect that 85% will go through with donating and 15% will not. Ultimately, we estimate that roughly two out of 100 people will donate to United Way after first being aware of them.

### **Recommendation:**

United Way needs to incorporate more options for viewers and potential donors to access various information pertaining to the organization. Currently, the only link in their social media leads to their general website. However, this does not provide the viewer with much information and does not provide ample means for answering potential questions about what the organization does, who is involved, where the money goes, etc. Instead of a single, general website, United Way should include "Linktree" in their social media bios and posts. This "Linktree" will allow United Way to input multiple links and websites in one focused place and will also allow the viewer to specially choose which link they want to view. For example, if a viewer simply wants to donate money without gathering more information, one of the links within the "link tree" will go straight to the donation page. Additionally, if someone wants to specifically read about personal narratives and stories from people who have been positively affected by United Way's work, then there will be a specific link within the "link tree" for them to visit. This not only adds organizational prowess to United Way's ability to provide information but also gives the viewer a much easier method of navigating information and enjoying more ease of use. The overall ideology would be to reduce the number of clicks for the viewer so that they can get from point A to point B more easily and not lose interest in donating. Viewers would now have a seamless pathway to obtaining the necessary information they need and want, ultimately leading them to donate more often.

### **References:**

<https://www.instagram.com/uwlafayette/?hl=en>

[https://linktr.ee/s/join-linktree-pro-for-free-ga/?utm\\_source=google&utm\\_medium=&utm\\_campaign=Always\\_On\\_US\\_Google\\_Performance\\_MAX\\_VBB&utm\\_term=&utm\\_content=&gad\\_source=1&gclid=CjwKCAjwuMC2BhA7EiwAmJKRrHFL9ZUgjoykeVf02QNPWcQipwNfAcw6TWG5VXVKk55XAjyVERakxoCpAkQAvD\\_BwE&gclsrc=aw.ds](https://linktr.ee/s/join-linktree-pro-for-free-ga/?utm_source=google&utm_medium=&utm_campaign=Always_On_US_Google_Performance_MAX_VBB&utm_term=&utm_content=&gad_source=1&gclid=CjwKCAjwuMC2BhA7EiwAmJKRrHFL9ZUgjoykeVf02QNPWcQipwNfAcw6TWG5VXVKk55XAjyVERakxoCpAkQAvD_BwE&gclsrc=aw.ds)



## 2.5 Marketing Activities

---

### Introduction:

Consumer Marketing activities are the strategic efforts undertaken to understand, engage, and influence potential supporters or donors. These activities involve identifying key audiences, crafting targeted messages, and utilizing various channels – such as social media, email campaigns, and community outreach – to effectively communicate the mission and impact of nonprofit partners. The goal is to build meaningful, personal connections with individuals and businesses, encouraging them to contribute time, resources, or funds to support our collective efforts in addressing community needs.

### Framework:

Marketing Activity	Details of Activity	Expected Outcome
<b>Website/Email Marketing</b>	Utilize the website as a landing page for digital advertising (social media, search ads, OTT, video ads). Send targeted email newsletters to engage donors and promote programs.	Increased website traffic, enhanced brand awareness, and stronger donor engagement.
<b>Social Media</b>	Post regular content on social media platforms, including success stories, program highlights, and donor testimonials. Conduct “Ask Me Anything” sessions to engage followers.	Increased social media engagement, higher brand loyalty, and stronger online community presence.
<b>Event Marketing</b>	Organize events during key periods (e.g., campaign season, tax season) to launch, update, and conclude fundraising campaigns. Publicize these events to attract media attention.	Higher community participation, enhanced media coverage, and stronger connections with donors.

<b>Collaboration with Partners</b>	Partner with local businesses (e.g., breweries, cafes) for co-branded events and cross-promotion. Engage with corporate sponsors for event sponsorships and media partnerships.	Broadened reach, increased brand visibility, and strengthened community ties.
<b>Rebuild Read to Succeed</b>	Launch a marketing and communications plan to recruit 500 volunteers for Read to Succeed over three years. Target businesses, teachers, and community members for participation.	Restoration of volunteer levels to pre-pandemic numbers, and enhanced community involvement.
<b>K-Camp Enrollment Expansion</b>	Work with schools and community organizations to increase enrollment in Kindergarten Countdown Camp to 325 by 2025	Higher program enrollment, better educational outcomes for children, and increased community support.
<b>Texting (SMS) Campaigns</b>	Implement SMS campaigns using MobileCause to engage young adults, reminding them of pledges, events, and volunteer opportunities.	Increased donor engagement, higher retention rates, and enhanced communication effectiveness
<b>Focus Groups and Surveys</b>	Conduct focus groups and surveys with non-donors to refine messaging and identify new strategies for converting them into active donors.	Improved targeting, more effective messaging, and higher conversion rates of non-donors to donors.

### Analysis:

The idea is to focus on enhancing United Way Greater Lafayette's digital engagement, strengthening community ties, and expanding outreach to increase donor numbers and volunteer participation. By leveraging digital advertising, social media, and SMS campaigns, United Way aims to engage younger demographics while maintaining strong community connections through event-driven campaigns and partnerships. The revitalization of key programs like Read to Succeed and new initiatives like the Retired United group will further solidify relationships with

donors and volunteers, ensuring long-term community impact and sustained growth in Greater Lafayette.

### **Recommendations:**

In addition to the existing plan, consider the following recommendations to enhance United Way of Greater Lafayette's marketing efforts:

- Collaborative Campaigns with Local Influencers: Partner with local influencers and community leaders to leverage their social media reach, increasing brand visibility and attracting younger audiences.
- Interactive Online Events: Host virtual events such as webinars or live Q&A sessions with community figures and beneficiaries to engage potential donors and provide a platform for direct interaction with United Way's mission.
- Storytelling Campaigns: Develop and share compelling personal stories of individuals impacted by United Way's programs across social media and newsletters to build emotional connections and encourage support.

### **References:**

1. <https://www.wildapricot.com/blog/nonprofit-marketing-plan#1-assess-your-past-nonprofit-marketing-efforts>
2. <https://blog.hubspot.com/marketing/market-research-buyers-journey-guide#how-to-do>
3. <https://uwlfayette.org/kickoff24/>
4. <https://www.wildapricot.com/blog/nonprofit-marketing-plan#8-choose-the-best-marketing-platforms-to-share-your-message>

## 2.6 Company Overview

### Introduction:

Since 1923, the United Way of Greater Lafayette has been more than just a community organization; it has been a driver for change, creativity, and collaboration. From humble origins as a group of local individuals addressing Lafayette's pressing welfare needs, the organization has grown into an influential advocate for community improvement. Today, United Way serves as the foundation of social impact in Tippecanoe County, laying the groundwork for a future in which every individual can thrive.

### Framework:

#### **A Legacy of Collaboration and Growth**

What began as a modest fundraising campaign for nine local charities has grown into a large network of over 20 partners addressing intricate social issues front on. The United Way's development reflects the changing needs of the Greater Lafayette region, from negotiating the Great Depression's economic problems to tackling contemporary concerns such as healthcare access, school inequities, and financial instability. This agility has enabled the organization to remain at the forefront of local development while adhering to its long-term sustainability goals.

#### **Core Capabilities: Empowering Communities and Mobilizing Change**

United Way's strength stems from its unique capacity to bridge barriers, whether it's linking organizations with resources, bringing companies together for collective impact, or inspiring individuals to take responsibility for their futures. The organization's three pillars—education, financial stability, and health—form the basis of its activities. Innovative initiatives like Read to Succeed, which increases childhood reading rates, and VITA, a tax aid project for low-income households, are good examples of how the United Way translates community needs into tangible solutions.

But what actually distinguishes United Way is its attitude to involvement. From the Run United 5K to the LEC Golf Outing, United Way provides opportunities for community people to actively participate in the change they want to see. The Volunteer Engagement Center serves as a beacon of civic engagement, connecting countless volunteers with ways to contribute.

#### **Market Position: The Power of Unified Action**

United Way of Greater Lafayette not only exists, but also leads the nonprofit industry. The organization's ability to bring together a diverse group of funders, business partners, and community stakeholders has cemented its status as a premier social impact leader. With a reputation for financial openness and accountability, United Way inspires trust, not just by displaying outcomes, but also by building places where every dollar, hour, and effort contributes toward quantifiable, meaningful change.

## **Analysis:**

### **Vision for the Future: Innovation for Impact**

In a world where change is rapid, United Way of Greater Lafayette sees innovation as the key to addressing tomorrow's concerns. Whether via a data-driven approach to fundraising or an emphasis on sustainable community activities, the organization is always adjusting to guarantee its relevance and influence as a force for good.

## **Recommendations:**

### **Biases and Challenges: Navigating Complexity**

While the United Way's extensive reach and multiple collaborations are key qualities, they may also bring unnoticed prejudices. Corporate donations, for example, might influence program goals, perhaps pushing less visible community concerns to the background. Furthermore, a concentration on legacy initiatives may sometimes eclipse developing demands, particularly when new data indicates that a shift in priorities is required. This emphasizes the significance of regular community feedback and adaptive strategy changes to promote inclusion and relevance across all demographics.

## **References:**

1. United Way of Greater Lafayette - Official Website: [uwlfayette.org](http://uwlfayette.org) ([United Way of Greater Lafayette](#)).
2. United Way Worldwide - United Way of Greater Lafayette Information: [unitedway.org](http://unitedway.org) ([United Way](#)).

## 2.7 Competitor Overview

### Introduction:

#### **The Strategic Advantage of Competitor Analysis**

Understanding your rivals is not just a need in the ever-changing nonprofit market but also a strategic advantage. Competitor research allows us to detect market trends and service gaps and focus on the distinct value that United Way of Greater Lafayette provides to the community. By studying our rivals, we get crucial insights that guide our actions, helping us to remain ahead of the competition and constantly improving our tactics to serve the Greater Lafayette area better.

### Framework:

#### **Understanding the Landscape: The Competitors of United Way of Greater Lafayette.**

Greater Lafayette's nonprofit sector thrives with groups dedicated to making a difference. However, certain rivals stand out because of their size, reach, and impact. These groups, despite sharing a shared purpose of community improvement, frequently adopt various techniques that distinguish them in the market.

#### **Direct Competitors**

##### **1. The Community Foundation of Greater Lafayette (CFGL).**

Market Position: CFGL is a powerful presence in the local nonprofit landscape, owing to its extensive community connections and huge endowment, which enables enormous grant-making capabilities.

Core strategies:

- Focused Funding: CFGL focuses on focused grants that address specific community needs, such as education and the arts, allowing it to establish a specialization in these areas.
- Endowment Growth: By creating a strong endowment, CFGL protects its long-term viability and impact on the community.

## **2. Tippecanoe County Council on Aging (TCCA)**

Market Position: TCCA is a specialized organization that provides services to the senior population in Tippecanoe County. This demographic is becoming increasingly important as it matures.

Core strategies:

- Specialized Programs: TCCA provides designed programs to meet the specific requirements of elders, such as transportation and healthcare help.
- Advocacy and Awareness: TCCA is a prominent advocate for senior concerns at the local level, establishing itself as the go-to resource for aged care.

## **3. Lafayette Urban Ministry (LUM):**

Market Position: LUM is a significant player in the local nonprofit sector, focusing on emergency shelter, food assistance, and youth programs. These services align closely with United Way's mission, making LUM a direct competitor.

Core Strategies:

- Emergency Services: LUM provides immediate support to those in crisis, offering shelter, food, and other essential services.
- Youth Programs: LUM runs several programs aimed at supporting and mentoring young people, which aligns with United Way's educational initiatives.

## **4. The Arc of Tippecanoe County:**

Market Position: The Arc of Tippecanoe County serves individuals with intellectual and developmental disabilities, providing a range of support services. Their focus on disability services places them as a direct competitor in specific community segments.

## Core Strategies:

- Support Services: The Arc offers comprehensive support, including advocacy, education, and social opportunities for individuals with disabilities.
- Community Integration: They focus on integrating individuals with disabilities into the broader community, promoting inclusion and equality

## Indirect Competitors

### 1. Big Brothers Big Sisters of Greater Lafayette:

Market Position: Although primarily focused on mentoring and youth development, Big Brothers Big Sisters competes indirectly by addressing community needs through educational and developmental programs for young people.

## Core Strategies:

- Mentorship Programs: The organization pairs adult mentors with children in need of guidance and support, which aligns with United Way's broader educational and youth-focused initiatives.
- Youth Development: Their programs aim to build confidence, improve academic performance, and foster positive relationships.

### 2. Habitat for Humanity of Lafayette:

Market Position: Habitat for Humanity focuses on housing stability by building affordable homes for families in need. While their mission overlaps with United Way's focus on financial stability, they approach it from a different angle.

## Core Strategies:

- Home Construction: Habitat for Humanity builds and renovates homes to provide affordable housing solutions.
- Volunteer Engagement: The organization heavily relies on community volunteers, fostering a strong sense of local involvement and support.

## **Analysis:**

The competitive landscape demonstrates that, while each organization excels in distinct areas, United Way of Greater Lafayette's strength is its comprehensive approach. Unlike rivals specializing in specific issues like food security or senior care, United Way covers various community needs, including education, financial stability, and health. This holistic strategy broadens our influence and establishes us as a vital participant in the community's general well-being.

However, this broad scope may offer complications. For example, our wide objective may result in resource dispersion, in which efforts are stretched too thin across several programs, thereby reducing our total effect. Additionally, competitors like CFGL and LUM, with their focused funding strategies, might capture donor attention in specific sectors, such as education or the arts, where they might be less visible.

The United Way of Greater Lafayette's strength is its complete strategy, but staying competitive in the nonprofit sector demands ongoing adaptation. By capitalizing on our unique position, forging strategic connections, and directing our resources where they are most needed, we can preserve our leading position and grow our influence in new and important ways.

## **Recommendations:**

**Leverage Holistic Impact:** Continue highlighting and promoting United Way's unique position as a holistic service provider. Highlight tales that demonstrate how our integrated initiatives contribute to long-term community improvement.

**Data-Driven Focus Areas:** Use data analytics to determine the community's most pressing needs and distribute resources appropriately. This will ensure we can continue to efficiently satisfy emerging requirements without overextending our capabilities.

**Targeted Campaigns:** Create campaigns that appeal to the areas where rivals are strong. For example, introducing a senior wellness program might position us as a market leader in aged care, which TCCA presently dominates.

**Engage Younger groups:** Balance out the prospective donor base, lean toward more established industries, and launch initiatives that attract younger groups. This might include tech-driven volunteer opportunities or educational efforts geared toward the next generation of community leaders.

## **References:**

<https://www.inspiringgreater.org/>

<https://www.guidestar.org/profile/35-1300844>

Lafayette Urban Ministry. (n.d.). Retrieved from <https://www.lumserve.org/>

The Arc of Tippecanoe County. (n.d.). Retrieved from <https://www.arcotippecanoe.org/>

Big Brothers Big Sisters of Greater Lafayette. (n.d.). Retrieved from <https://www.bbbslaf.org/>

Habitat for Humanity of Lafayette. (n.d.). Retrieved from <https://www.lafayettehabitat.org/>

United Way of Greater Lafayette. (n.d.). Retrieved from <https://www.uwlafayette.org/>



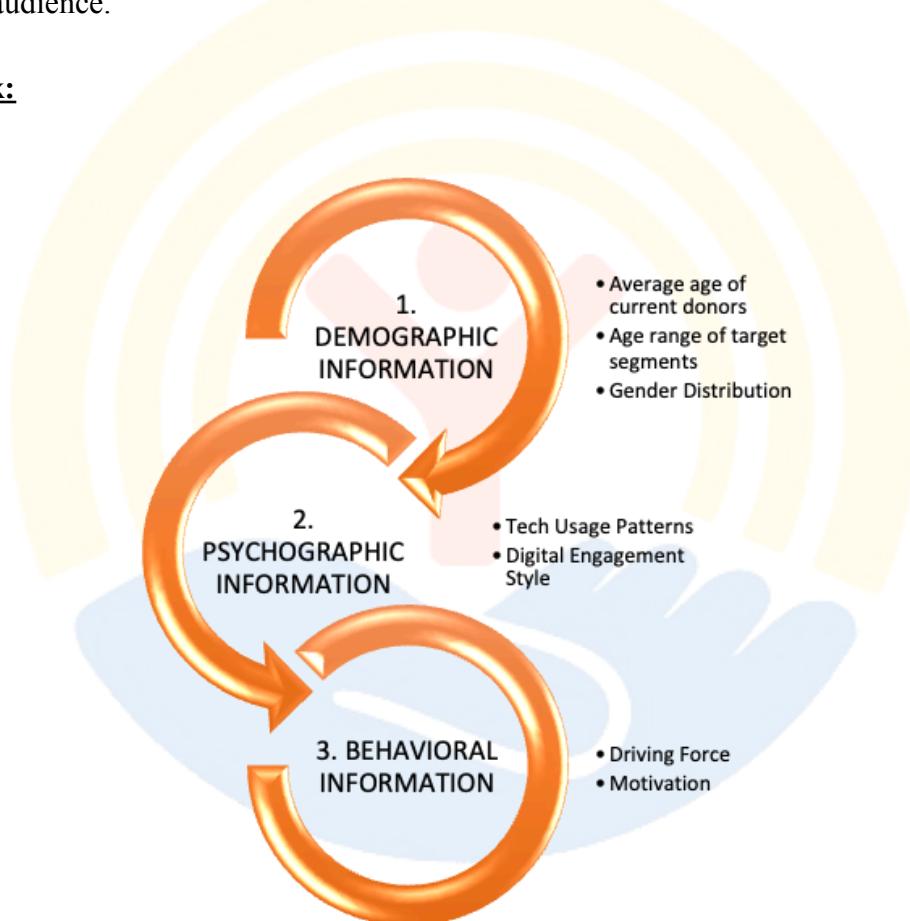
## 3.1 Target Segment Profile

---

### Introduction:

Market research aims to gather and analyze data to create a comprehensive profile of your target market. This profile, often called a persona, represents the ideal customer with a genuine need for your product or services. It includes detailed insights into demographic information, lifestyles, values, pain points, and behavioral patterns. By developing a specific and radiant customer profile, businesses can customize their strategies more effectively to meet the needs of their target audience.

### Framework:



### For Lafayette IN:

1. Gather demographic information from local sources to understand the population profile
2. Analyze psychographic data, focusing on tech usage patterns and digital engagement styles

3. Assess behavioral motivations for donating to tailor strategies effectively

### **Analysis:**

#### **1. Demographic Information:**

**Table I:** Age Group, Career Stage, and Place of Birth for Lafayette IN:

Characteristic	Early Career Professionals	Mid-career Professionals	Senior Professionals	Retirees
Age	18-24 yrs	<b>25-44 yrs</b>	45-54 yrs	<b>55+</b>
Total Lafayette Population	10.7%	<b>32.7%</b>	9.7%	<b>22.7%</b>
Born in state of residence	11.6%	<b>24.8%</b>	8.7%	<b>24.4%</b>
Born in other state in the US	7.3%	<b>47.3%</b>	11%	<b>23%</b>

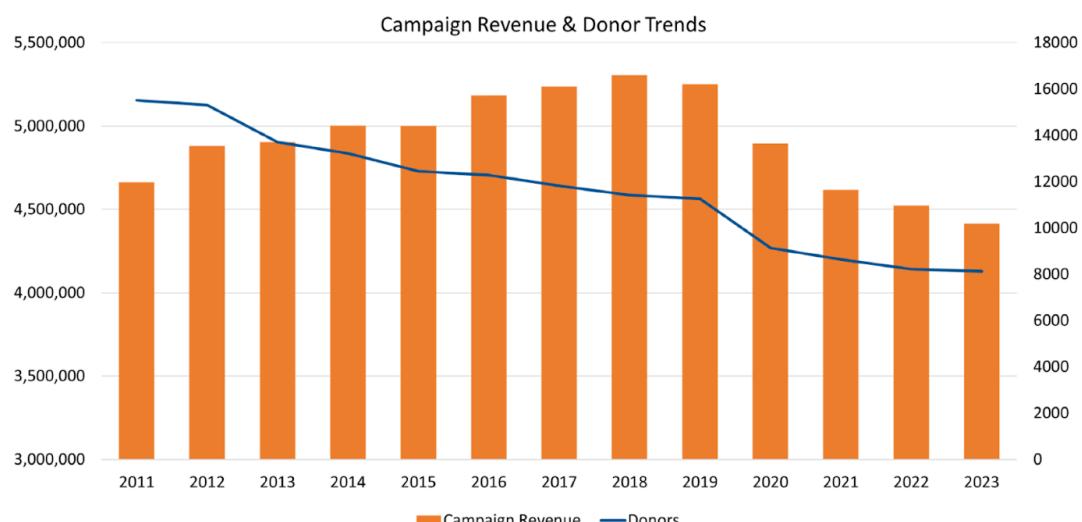
Primary Target I

Primary Target II

**Gender Distribution:** 40 % female and 60% male

**Average Age:** 58 years old

**Table II:** Decline in Total Number of Donors



## **Primary Target I - Mid-career Professionals**

Among mid-career professionals aged 25-44, Table I indicates that 47.3% were born in another state in the US, suggesting a large portion of mid-career professionals who have migrated to Lafayette, IN for career opportunities, education, family reasons, etc. Because of the delayed arrival to the community, it can be expected that a lack of engagement is present among younger professionals with UWGL. This demographic represents a significant pain point in the multi-generational engagement of donors, given that the average age of current donors is 58 years old. This underrepresentation of younger professionals and newer generations in the donor base underscores the need to focus on this group. Therefore, mid-career professionals have been identified as a primary target for the SMART goal of increasing the number of individual donors by December 2025.

## **Primary Target II - Retirees**

Table II demonstrates the steady decline in the total number of donors, highlighting a 50% reduction (roughly 16,000 to 8,0000 donors) from 2019 to 2023, with a significant pain point being the loss of retirees. Retirees are defined at UWGL as workplace donors who retire (60+) that are familiar with UWGL and have supported it with their pledges. The average age of current donors is 58 years old, and therefore following the declining trend, it is expected that the work professionals retiring in the next few years will lose their corporate matches and have diminished engagement opportunities. Consequently, UWGL will continue to see the declining trend of total number of donors over time. Therefore, the retirees have been identified as a primary target for the SMART goal of retaining a minimum of 75% of existing donors by December 2025.

## **2. Psychographic Information:**

**Mid-career Professionals:** Tech-Savvy Donors: Prefer online donations, social media engagement and digital communication. Responsive to email campaigns and online ads. Also prefer to spend time on experiences and are financially conservative, and focus on peer to peer networking.

**Retirees:** Traditional Donors: Favor traditional communication methods such as direct mail, in-person events, campaigns and phone calls; may engage less frequently. Known to respond to nearly every form of fundraising campaign, and value staying in touch with regular reports and updates on the non-profit's progress.

### **3. Behavioral Information:**

#### **Motivations for Mid-Career Professionals (Ages 25-44):**

1. **Social Influence:** Millennials are highly socially driven, with 82.2 million being "social givers" who are more likely to donate or volunteer if their peers are involved. Peer influence plays a significant role in their charitable actions.
2. **Transparency:** Clarity and transparency are crucial for millennials. They prioritize understanding how their contributions will impact the cause and value detailed information about the use of their donations.
3. **Engagement and Impact:** This group values engagement and seeks tangible evidence of their donations making a difference. Interactive and personalized communication can enhance their connection to the cause.

#### **Motivations for Retirees (55+):**

1. **Disposable Income:** Baby Boomers, having the highest disposable income among generational groups, are increasingly engaging in philanthropy, with nearly half participating in monthly giving programs.
2. **Ongoing Communication:** Maintaining regular contact and emphasizing the importance of the cause helps strengthen relationships with Baby Boomers. Personal engagement and consistent updates about the organization's impact are key.
3. **Legacy and Impact:** Retirees often focus on leaving a legacy and prefer supporting causes that align with their values and life experiences. They are motivated by opportunities to make a lasting impact and contribute to meaningful, long-term projects.

### **Recommendations:**

#### **Tech-Savvy Donors:**

##### **1. Digital Presence and Intervention:**

- a. Ensuring the UWL website is mobile responsive, easy to navigate and optimized for quick donations. It is vital to incorporate engaging videos, project stories, infographics and interactive elements.
- b. Use of platforms like Facebook, Instagram, Twitter and LinkedIn for regular updates, live feeds and interactive campaigns. Utilizing google ads (free for nonprofits) is also an effective way to reach this group of donors.

## **2. Innovative fundraising Channels:**

- a. Crowdfunding: Launch campaigns for specific events on popular crowdfunding platforms to attract the tech-savvy group who are familiar with and trust these platforms.

## **3. Personalized Communication:**

- a. Create targeted email campaigns with personalized messaging, dynamic content, and interactive elements to boost engagement.

### **Traditional Donors:**

#### **1. Personalized Outreach:**

- a. Capture attention of this group via personalized letters and colorful printed materials showcasing impactful success stories and specific programs. Encourage action with a compelling and clear call to action.

#### **2. Community Events:**

- a. Hosting local events like charity dinners, community fairs and volunteer opportunities aligns well with traditional donors for face to face interactions.
- b. Partnering with local businesses and organizations also helps reach traditional donors through familiar community oriented channels.

#### **3. Recognition and Appreciation:**

- a. Send thank you notes and personalized recognition material. Highlight top donors in newsletters, annual reports and at special events.

### **Integrated Approach:**

While running separate campaigns for a segmented audience is critical, it is also important not to lose sight of an integrated and hybrid approach which will cater to people in the middle for whom both approaches appeal.

### **References:**

<https://data.census.gov/table/ACSST1Y2022.S0601?q=Lafayette%20indiana>

<https://www.imissioninstitute.org/nonprofit-fundraising/nonprofit-fundraising-what-motivates-donors-in-2020/>

## 3.2 Value Proposition

---

### Introduction:

The value proposition statement is an effective, concise, and unique statement designed for internal use, clearly explaining the brand's strategy and guiding tactical decisions for those responsible for creating, managing, and supporting United Way's brand. This sentence will emphasize the critical elements of United Way's strategy – such as the target audience, frame of reference, and core benefits – without outlining specific brand tactics.

### Framework:

"To the residents and community partners of Greater Lafayette who seek to improve the quality of life, United Way of Greater Lafayette is the brand of trusted leaders in community mobilization, competing mainly with other local non-profit organizations and charitable foundations that drive transformative change through a unified approach to education, financial stability, and health because we leverage deep local partnerships and transparent impact reporting to ensure every contribution directly enhances the well-being of our community."

### Analysis:

**Perceptual Frame of Reference:** "...Trusted leaders in community mobilization..."

United Way of Greater Lafayette presents itself as the go-to organization for citizens and community partners looking to improve the quality of life in the Greater Lafayette area. By positioning its brand as a trusted leader in community mobilization, United Way stresses its role in bringing the community together to achieve common goals. This stance is strengthened by their complete approach to significant areas such as education, financial stability, and health. The organization's emphasis on deep local ties and comprehensive impact reporting guarantees that stakeholders can be confident that their donations are being used efficiently to produce actual benefits in the community.

**Competitive Frame of Reference:** "...Other local non-profit organizations and charitable foundations that drive transformative change through a unified approach to education, financial stability, and health..."

Other local non-profit organizations and charitable foundations In a landscape where various local non-profit organizations and charitable foundations vie for support, United Way of Greater Lafayette distinguishes itself by offering a unified and holistic approach to community development. While other organizations may focus on individual aspects of social change,

United Way integrates education, financial stability, and health into a single strategy, thereby addressing multiple needs simultaneously. The organization's commitment to transparency and the direct impact of contributions further differentiates it from competitors, providing additional value to donors and volunteers who want to see measurable outcomes from their involvement.

### **Recommendations:**

- Build and deepen relationships with diverse community groups and broaden the base of support and resources.
- Enhance volunteer engagement. Develop targeted campaigns to recruit, train and retain volunteers. Implement recognition and feedback mechanisms to ensure volunteers feel valued and motivated.
- Invest in systems and processes for tracking and analyzing the impact of funded programs. Share success stories and measurable outcomes with stakeholders.
- Ensure that all internal and external communications align with the value proposition. Develop a communication plan that clearly articulates United Way's mission, goals, and achievements to various audiences.
- Increase efforts to educate the community about United Way's mission, goals, and ways to get involved. Use various channels, including social media, local events and community partnerships.
- Display the value proposition prominently on the homepage of the website so visitors immediately understand the core benefits and unique value being offered.

### **References:**

- <https://uwlafayette.org/>
- <https://www.instagram.com/uwlafayette/?hl=en>
- <https://www.facebook.com/uwlafayette/>
- <https://www.linkedin.com/company/uwlafayette/>
- <https://equibrandconsulting.com/services/brand-consultant/brand-positioning/strategy/>

## 3.3 Three Circles

---

### Introduction:

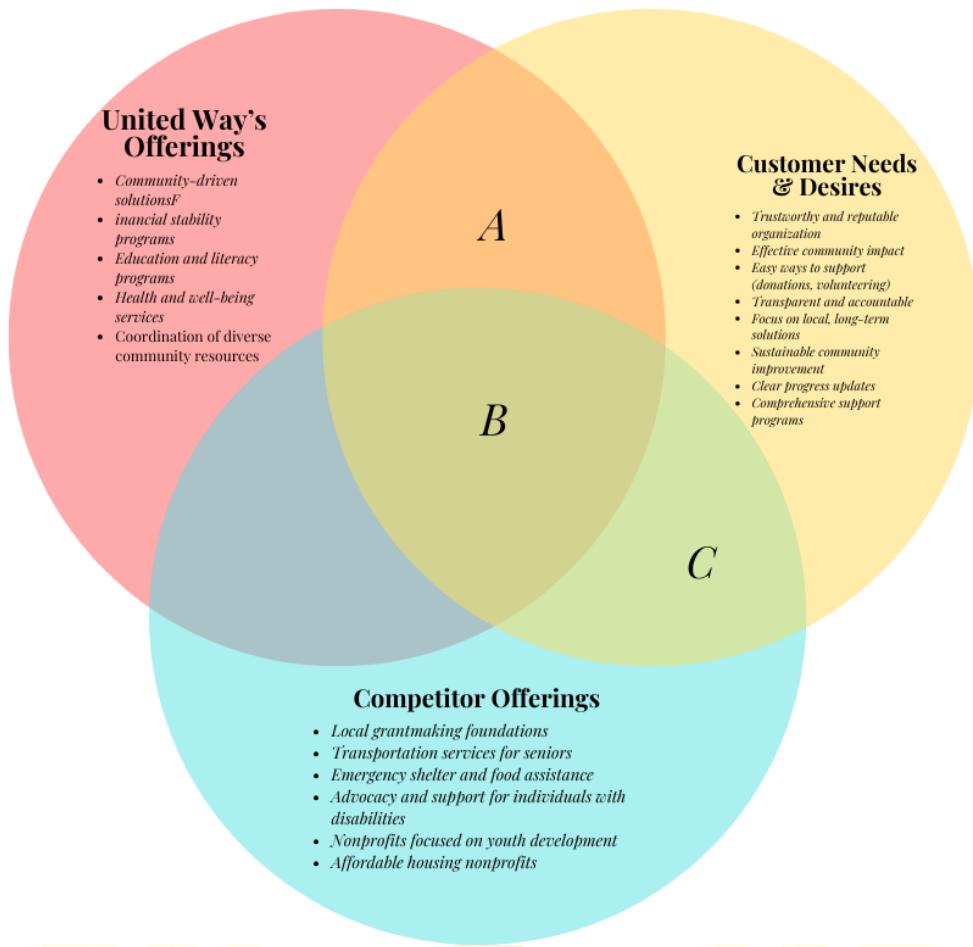
The Three Circles of Brand Positioning is a strategic technique that assists companies like United Way of Greater Lafayette in determining their distinctive value in the marketplace. This approach finds and assesses three critical areas: customer demands, company strengths, and competitive offerings. By investigating these intersections, United Way may improve its brand positioning by clearly defining its Points of Parity (PoP), Points of Difference (PoD), and regions for growth. This worksheet explains how to use the Three Circles Framework to integrate United Way's purpose with community needs, differentiate it from rivals, and identify strategic development prospects.

### Framework:

The Venn diagram (Three Circles Framework) below showcases:

1. Customer Needs & Desires: What the local community and stakeholders expect from nonprofit organizations.
2. United Way's Offerings: Programs and initiatives specific to United Way of Greater Lafayette.
3. Competitor Offerings: Programs offered by other local nonprofits and service organizations.

In the attached visual, Circle A represents United Way's Offerings, Circle B represents Points of Parity (POPs), and Circle C represents Competitor Offerings.



### Points of Difference (A: Unique to United Way)

- Community-driven solutions
- Financial stability programs
- Education and literacy programs
- Health and well-being services
- Coordination of diverse community resources

United Way distinguishes itself by offering a holistic approach, addressing financial stability, education, and health while coordinating multiple resources.

### Points of Parity (B: Shared by United Way, Competitors, and Customer Needs)

- Focus on local, long-term solutions
- Sustainable community improvement

These reflect common goals between United Way and competitors, aligning with customer desires for lasting, local impact.

## Competitors' Points of Difference (C: Unique to Competitors)

- Local grantmaking foundations
- Transportation services for seniors
- Emergency shelter and food assistance
- Advocacy for individuals with disabilities
- Youth development nonprofits
- Affordable housing nonprofits

Competitors focus on specific, niche services such as crisis response, advocacy, and housing, areas where United Way's involvement may be less pronounced.

### **Analysis:**

The Three Circles approach provides a valuable view of United Way's position in the Greater Lafayette area. Each region of the Venn diagram reflects an important component of the company's market dynamics.

**Area A (United Way's Points of Difference):** United Way distinguishes itself via community-driven solutions that prioritize long-term community impact, diversified initiatives in education, financial stability, health and well-being, and the capacity to coordinate resources across sectors. The United Way's distinct strength rests in its wide community resource coordination and comprehensive financial stability initiatives, which offer an extra layer of long-term effect.

**Area B (Points of Parity):** The junction of consumer demands with United Way and competitor products demonstrates that successful community impact, long-term solutions, and open, responsible service are widely desired. Both United Way and its rivals give clear progress reports and accessible assistance, ensuring that community members are informed about the outcomes and effect of their contributions.

**Area C (Competitor Points of Difference):** United Way's rivals, including local grant-making foundations and NGOs focused on transportation, housing, and youth development, provide specialized services that meet extremely specific community needs. For example, transportation services for elders and emergency shelter offers are vital, direct services supplied by rivals that the United Way may not prioritize.

The Venn diagram shows that United Way and its competitors share a focus on long-term, sustainable community impact, aligning with customer needs. United Way stands out by offering a wide array of community-driven, coordinated programs addressing health, education, and financial stability, positioning it as a comprehensive service provider. Competitors, however,

specialize in areas like emergency relief, advocacy, and housing, serving targeted community segments. This balance between United Way's broad scope and competitors' specialized offerings addresses a wide spectrum of community needs.

labeling the Diagram:

- A (United Way Points of Difference):  
United Way's comprehensive approach to addressing multiple social issues, ability to coordinate various local resources, and strong partnerships with businesses and government entities.
- B (Points of Parity):  
United Way, like its competitors, is community-focused, trustworthy, impactful, and transparent, with a focus on local and long-term improvements.
- C (Competitor Points of Difference):  
Competitors often specialize in specific areas (e.g., youth mentoring, affordable housing, disability advocacy). They provide targeted services but lack the broad coordination and community reach United Way offers.
- D (Common Discrepancy/Potential Equity):  
Customers value transparency, community impact, and access to comprehensive services, which all organizations strive to offer but may vary in their execution.
- E (United Way Greater Lafayette's Unique Offerings):  
United Way's ability to mobilize volunteers and resources across multiple sectors, engage in advocacy, and offer a broad range of services (from financial stability to education) differentiates it from more narrowly focused organizations.
- F (Competitor Unique Offerings):  
Competitors have niche expertise in areas like affordable housing (Habitat for Humanity), senior services (TCAA), disability support (Arc), and youth development (Big Brothers Big Sisters).
- G (Customer Needs):  
Localized, sustainable impact, trust, accountability, access to a broad range of support programs, and a clear focus on community well-being.

### **Recommendations:**

- United way should continue to focus on its strength in coordinating a broad range of services and addressing multiple social issues.
- Continue and expand efforts in mobilizing local resources and coordinating community efforts. This includes working with diverse sectors to provide a comprehensive suite of services.

- Highlight United Way's unique ability to mobilize resources across sectors and offer a broad range of services. Position this as a key differentiator from competitors with more specialized focuses.
- Focus on addressing common customer concerns such as transparency, impact and accessibility to enhance trust and equity.
- Create or expand programs that specifically target youth and families through educational workshops, family events, and mentorship programs
- Competitors might use grantmaking models, such as participatory grantmaking or impact investing. Explore alternative grantmaking models, where community members and donors are involved in the decision-making process, or impact investing to support sustainable projects and initiatives.

## **References:**

1. Keller, K. L. (2001). *Building Customer-Based Brand Equity: A Blueprint for Creating Strong Brands*.
2. Urbany, J. E., & Davis, J. H. (2010). *Strategic Insight in Three Circles*.
3. Bryson, J. M. (2018). *Strategic Planning for Public and Nonprofit Organizations: A Guide to Strengthening and Sustaining Organizational Achievement*.
4. Porter, M. E. (1980). *Competitive Strategy: Techniques for Analyzing Industries and Competitors*.
5. Sowa, J. E., Selden, S. C., & Sandfort, J. R. (2004). *No Longer Unmeasurable? A Multidimensional Integrated Model of Nonprofit Organizational Effectiveness*. *Nonprofit and Voluntary Sector Quarterly*.
6. Bloom, P. N., & Chatterji, A. K. (2009). *Scaling Social Impact: Strategies for Spreading Social Innovations*. *Stanford Social Innovation Review*.

## 3.4 Brand Perceptual Maps

### Introduction:

A perceptual map is a visual tool for understanding how customers perceive a brand or product in comparison to competitors. It is based on identifying two main variables that impact client decision-making, such as price, quality, features, or satisfaction. The map depicts how customers view various brands across several dimensions, emphasizing significant strengths and opportunities for improvement.

Creating a perceptual map can help United Way of Greater Lafayette understand how its initiatives compare to rivals. This paradigm improves decision-making by detecting gaps in customer expectations and market niches to target, hence facilitating strategic decisions in branding, marketing, and product creation.

In this analysis, the focus is on two key dimensions that are crucial to donor preferences:

**Transparency of Fund Utilization** and **Community Impact**. These reflect how much donors value knowing where their funds go and the tangible difference the organization makes in the local community.

### Framework:

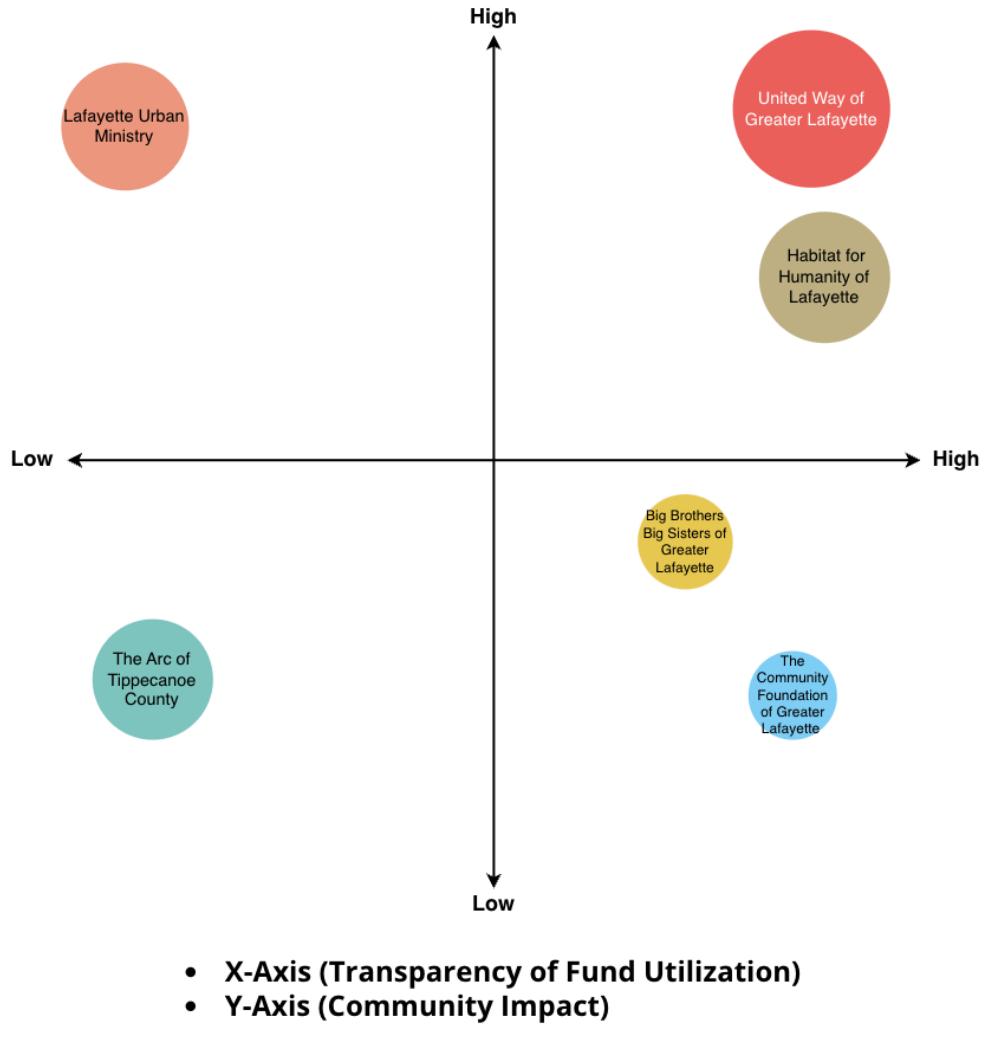
#### Dimensions

- **Transparency of Fund Utilization:** The clarity with which the organization communicates how donor funds are used.
- **Community Impact:** The degree to which the organization has a visible, positive effect on the local community.

Using customer perception surveys, the following competitors have been positioned on the map:

- The Community Foundation of Greater Lafayette (CFGL)
- Tippecanoe County Council on Aging (TCCA)
- Lafayette Urban Ministry (LUM)
- The Arc of Tippecanoe County
- Big Brothers Big Sisters of Greater Lafayette
- Habitat for Humanity of Lafayette

## Analysis:



The perceptual map provides intriguing insights into how the United Way of Greater Lafayette is seen by its local rivals.

## **Transparency in Fund Utilization:**

- United Way of Greater Lafayette: UWGL is known for its high transparency, which stems from well-established communication channels and reporting procedures. Donors have confidence in how their gifts are used, which increases their trust in the organization.
- The Community Foundation of Greater Lafayette (CFGL): CFGL is also regarded as transparent owing to its long history of administering donor-advised funds and fostering

philanthropic openness. However, its community influence is considered as indirect because it mostly helps other NGOs rather than running direct services.

- Tippecanoe County Council on Aging (TCCA) and Lafayette Urban Ministry (LUM): These organizations might enhance their openness, as they are seen to be less open about their financial operations than UWGL or CFGL.

### **Community Impact:**

- Habitat for Humanity of Lafayette: Habitat for Humanity, like UWGL, is transparent and has a visible influence on the local community by building homes and providing housing options. This establishes a strong presence in the minds of contributors seeking for meaningful causes.
- Big Brothers Big Sisters of Greater Lafayette: While this organization has a significant impact on individual lives, it is believed to have less community-wide influence than UWGL and Habitat for Humanity, both of which focus on bigger structural improvements.
- The Arc of Tippecanoe County: While the Arc is vital to people with intellectual and developmental disabilities, it may not have the broad community effect that funders value as much as bigger organizations. It also ranks lower in transparency, highlighting a potential area for improvement.

### **Customer Segments**

- **Impact-Focused Donors:** Donors who prioritize the tangible effects of their contributions on the community will likely be attracted to UWGL and Habitat for Humanity, given their strong community presence and visible results.
- **Transparency-Seeking Donors:** Donors who want to know exactly where their money is going are more likely to favor UWGL and CFGL due to their clear and accessible financial reporting.
- **Balanced Donors:** Donors who seek both high transparency and significant community impact will find UWGL to be the most appealing, as it excels in both dimensions.

### **Recommendations:**

- Increase Visibility of Community Impact: The United Way of Greater Lafayette should work on conveying its effect in more visible and approachable ways, such as highlighting success stories and demonstrating how its initiatives affect the local community. This might boost its position even higher in the Community Impact category.

- Leverage Transparency as a Key Strength: Although openness is already a strength, UWGL should continue to stress it in donor communications. Highlighting its effective money usage in yearly reports and social media campaigns can assist to build confidence, especially when compared to competitors such as LUM or TCCA.
- Engage Balanced Donors: UWGL should focus on the "Balanced Donors" sector, which values both transparency and effect. Tailored advertising that highlight both how the money are used and the good effects they provide will resonate with this demographic, increasing engagement and contributions.
- Monitor Competitor Performance: Conducting regular polls to gauge how competitors such as Habitat for Humanity and CFGL are evaluated in comparison to UWGL will give real-time data that can be used to drive strategic decisions. This will assist UWGL to remain competitive and responsive to donor preferences.

## **References:**

- Kotler, P., & Keller, K.L. (2015). *Marketing Management* (15th ed.). Pearson.
- DeSarbo, W.S., Park, J., & Scott, C.J. (2008). A model-based approach for visualizing the dimensional structure of preference data. *Psychometrika*, 73(1): 1–20.
- Day, G.S., Shocker, A.D., & Srivastava, R.K. (1979). Customer-Oriented Approaches to Identifying Product-Markets. *Journal of Marketing*, 43(4): 8–19.
- DeSarbo, W.S., Grewal, R., & Scott, C.J. (2008). A Clusterwise Bilinear Multidimensional Scaling Methodology. *Journal of Marketing Research*, 45(3): 280–292.
- Porter, M.E. (2008). The Five Competitive Forces That Shape Strategy. *Harvard Business Review*, 86(1): 86–104.
- <https://www.guidestar.org/profile/35-1004296>
- <https://www.lafayettehabitat.org/>
- <https://www.cfglaf.org/>
- <https://www.arctippecanoe.org/>

## 3.5 Brand Mantra

---

### Introduction:

Kevin Keller's Brand Mantra framework is a simple yet effective method for capturing a brand's essence in three words. Businesses may create a distinct identity that connects with both stakeholders and customers by establishing a brand's function, concentrating it with a descriptive modifier, and incorporating emotional appeal with an emotional modifier. This worksheet will assist United Way of Greater Lafayette in developing a powerful and memorable brand motto, enabling more focused communication and consistent brand positioning. The purpose is to offer a clear, simple, and meaningful portrayal of United Way's values and emotional connection with its audience.

### Framework:

**Brand Function (What you do):** Empower

**Descriptive Modifier (What makes it unique):** Holistic

**Emotional Modifier (What excites):** Compassionate

**Brand Mantra:** Empowering Holistic Compassion

### **Chart Breakdown:**

<b>Function</b>	<b>Descriptive Modifier</b>	<b>Emotional Modifier</b>
Empowering	Holistic	Compassionate

This mantra conveys United Way's ability to empower individuals and communities through a wide range of services that tackle multifaceted societal issues, all driven by a compassionate approach.

### Analysis:

The selected mantra focuses on United Way's basic mission of empowerment—providing the skills and resources needed for the Lafayette community to succeed. The phrase holistic refers to the breadth of United Way's services, which range from education and financial stability to health and basic necessities, making it a multifaceted organization. By using compassionate as an emotional modifier, the brand interacts emotionally with contributors, volunteers, and

beneficiaries, emphasizing empathy, care, and devotion as major drivers of the organization's goal.

This three-word framework reinforces United Way's strategic orientation by emphasizing its commitment to comprehensive community well-being. The comprehensive approach guarantees that the organization can adjust to the changing demands of the community, while compassion adds a degree of authenticity, making the brand more relevant and trustworthy.

### **Recommendations:**

- Use the Brand Mantra in Communications: Include "Empowering Holistic Compassion" in important marketing materials, speeches, and campaigns. This can reaffirm the United Way's mission and ideals in the eyes of contributors and community members.
- Align Programs With Mantra: Ensure that all programs and efforts, whether focused on youth education or senior care, mirror the brand's comprehensive and caring values.
- Storytelling Approach: Create success stories about individuals or groups who have been empowered by United Way's activities, highlighting how the organization's comprehensive services and caring assistance have improved their lives.
- Emotional Engagement Research: Conduct focus groups to confirm that the emotional connection (compassion) resonates with the target audience, and tweak the emotional modifier as needed to maximum appeal.

### **References:**

Keller, K. L. (2001). *Building Customer-Based Brand Equity: A Blueprint for Creating Strong Brands*. Available at: <https://www.researchgate.net>

United Way of Greater Lafayette. (n.d.). *Organizational Overview and Mission*. Available at: <https://www.uwlafayette.org>

Nonprofit Branding Strategies. *A Review of Community Engagement Tactics in the Nonprofit Sector*. Available at: <https://nonprofitquarterly.org>

Kevin Keller's Three-Word Framework. (2023). *Brand Mantra and Its Application in Nonprofit Organizations*. Available at: <https://www.brandingstrategyinsider.com>

## 3.6 Hierarchical Values Map

### **Introduction:**

Hierarchical Values Maps (HVM) are tools used to explore customer values by linking product features to their benefits and ultimately to core personal values. This is achieved by continuously asking ‘why?’ in interviews, naturally shifting from specific details to broader concepts. The goal is to gain a deeper understanding of the emotional connection between the product and the consumer by following a four-level hierarchical value map that will analyze the following areas: Personal values, personal benefits, and product features.

- **Personal Values:**

- Personal values are high-level constructs such as a sense of accomplishment, peace of mind, or creating a better world

- **Personal Benefits:**

- Personal benefits are evaluations, moods, emotions, and strong feelings relating to the person and not the product
  - Feeling smart or productive, being in an upbeat mood, being at ease, or feeling a sense of enjoyment are all personal benefits

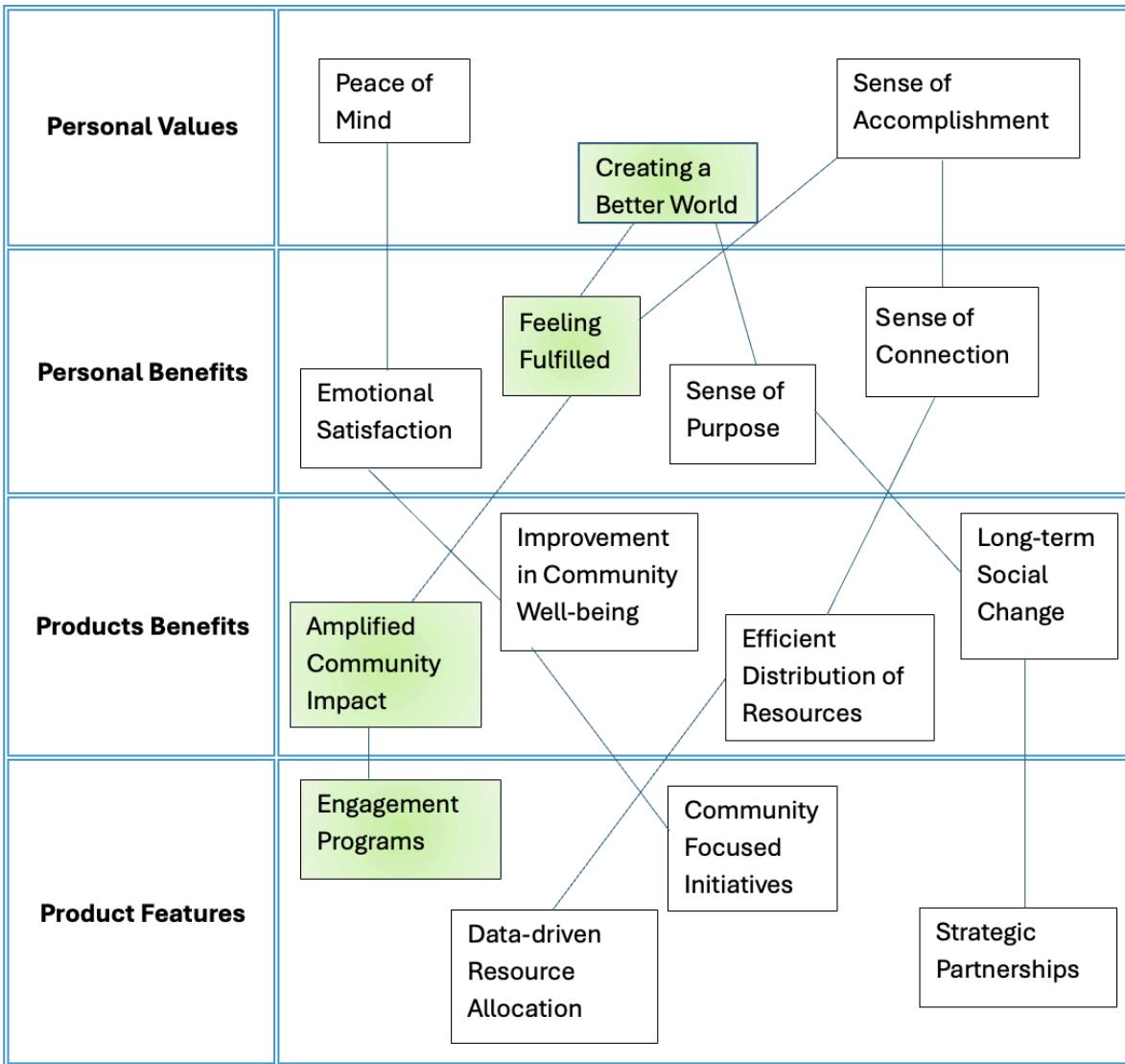
- **Product Benefits:**

- Product benefits constitute the core of a product
  - They represent the product’s ability to fulfill a fundamental need or want
  - They relieve pain or provide pleasure

- **Product Features:**

- Product features are the physical and tangible attributes of a product
  - They are used to provide a benefit and satisfy a need

## Framework:



### **Key:**

 Strengths

## Analysis:

Stage	Description	"Why?"
Personal Values	<b>Creating a better world</b>	<b>Why does someone support United Way Greater Lafayette?</b> Because they want to contribute to creating a better world and stronger community.
	<b>Peace of mind</b>	<b>Why?</b> They feel secure knowing they are making a meaningful impact through an established organization.
	<b>Sense of accomplishment</b>	<b>Why?</b> Their contributions lead to visible, positive changes in their local community.
Personal Benefits	<b>Feeling fulfilled</b>	<b>Why does it matter?</b> Individuals gain a sense of fulfillment from helping others and seeing results.
	<b>Sense of connection</b>	<b>Why?</b> They feel connected to their community, creating a sense of belonging.
	<b>Sense of purpose</b>	<b>Why?</b> Engaging with United Way provides clarity and direction in contributing to social good.
	<b>Emotional satisfaction</b>	<b>Why?</b> Helping others and supporting causes they believe in makes them feel emotionally rewarded.
Product Benefits	<b>Amplified community impact</b>	<b>Why is this important?</b> United Way multiplies individual efforts to solve larger community problems through collaboration.
	<b>Improvement in community well-being</b>	<b>Why?</b> United Way directly improves access to education, healthcare, and financial stability for underprivileged groups.
	<b>Long-term social change</b>	<b>Why?</b> United Way's initiatives target systemic issues like poverty, leading to lasting community improvement.
	<b>Efficient distribution of resources</b>	<b>Why?</b> United Way effectively channels donations and volunteer efforts to areas of highest need.
	<ul style="list-style-type: none"> <li>- Comprehensive volunteer and donor engagement programs</li> <li>- Diverse range of community-focused initiatives (education, financial stability, healthcare)</li> <li>- Strategic partnerships with local non-profits</li> </ul>	<p><b>What?</b> United Way provides structured volunteering and giving platforms that ensure meaningful involvement.</p> <p><b>What?</b> These initiatives cover essential community needs, addressing root causes of social issues.</p> <p><b>What?</b> United Way collaborates with other organizations to enhance the overall community impact.</p>

**- Data-driven resource allocation** **What?** United Way uses data to ensure resources are used effectively and the impact is measurable.

By constructing the Hierarchical Value Map for United Way Greater Lafayette, we can clearly identify the organization's unique position in the market. The personal values and benefits resonate strongly with the community's desire to support others, while the product features and benefits emphasize United Way's role as a central hub for impactful, sustainable change. This framework underscores how United Way differentiates itself from other organizations through its comprehensive, community-centric approach and its focus on long-term outcomes in education, health, and financial stability.

#### 1. Personal Values

- United Way emphasizes values like creating a **better world**, fostering **community unity**, and promoting **social responsibility**. Their mission revolves around improving **health**, **education**, and **financial stability** for everyone in the community, which ties directly into high-level personal values such as **civic duty**, **a sense of accomplishment** and a **desire for a more just and equitable society**.

#### 2. Personal Benefits

- People who engage with United Way might feel a strong sense of **fulfillment** and **purpose** by contributing to a better community. Donors and volunteers often experience **pride** and **empowerment**, knowing their efforts lead to tangible improvements in education, income stability, and health services for others.

#### 3. Product Benefits

- The core benefit of United Way's services lies in its ability to **solve community challenges** such as financial hardships, lack of educational support, and access to health resources. For example, programs like Kindergarten Countdown Camp and Read to Success help children succeed academically, while VITA (Volunteer Income Tax Assistance) offers financial relief to families.

#### 4. Product Features

- The tangible aspects of United Way's work are its **volunteer programs**, **fundraising campaigns**, and **partnership initiatives**. They offer practical avenues for community involvement, including volunteering, donating, and advocacy.

### **Recommendations:**

Based on the analysis of the HVM framework, our team has the following recommendations for United Way of Greater Lafayette:

#### 1. Promote Measurable Impact:

- a. **Recommendation:** Increase communication about the data-driven resource allocation and measurable outcomes. Transparency in how donor contributions translate into direct community improvements will instill trust and value placed in the organization.
  - b. **Action:** Consistently publish reports and infographics demonstrating the impact on education, financial stability, and healthcare sectors to keep supporters engaged and informed.
2. Enhance Digital Engagement
    - a. **Recommendations:** Utilize digital platforms more effectively to connect with younger demographics and those seeking convenient, online engagement opportunities.
    - b. **Action:** Invest in social media campaigns, virtual volunteering, and online donor engagement tools to meet modern expectations for convenience and impact.
  3. Highlight Core Programs and Successes:
    - a. **Recommendation:** Increase visibility of key programs like Kindergarten Countdown Camp, VITA, and Read to Success to demonstrate the real-world benefits that United Way provided to the community.
    - b. **Action:** Feature program successes in newsletters, community events, and media appearances to keep the focus on positive, tangible results.

**References:**

<https://creately.com/diagram/example/h8uhgoos1/hierarchical-values-map>

<https://www.b2binternational.com/publications/laddering-technique-find-what-people-value/>

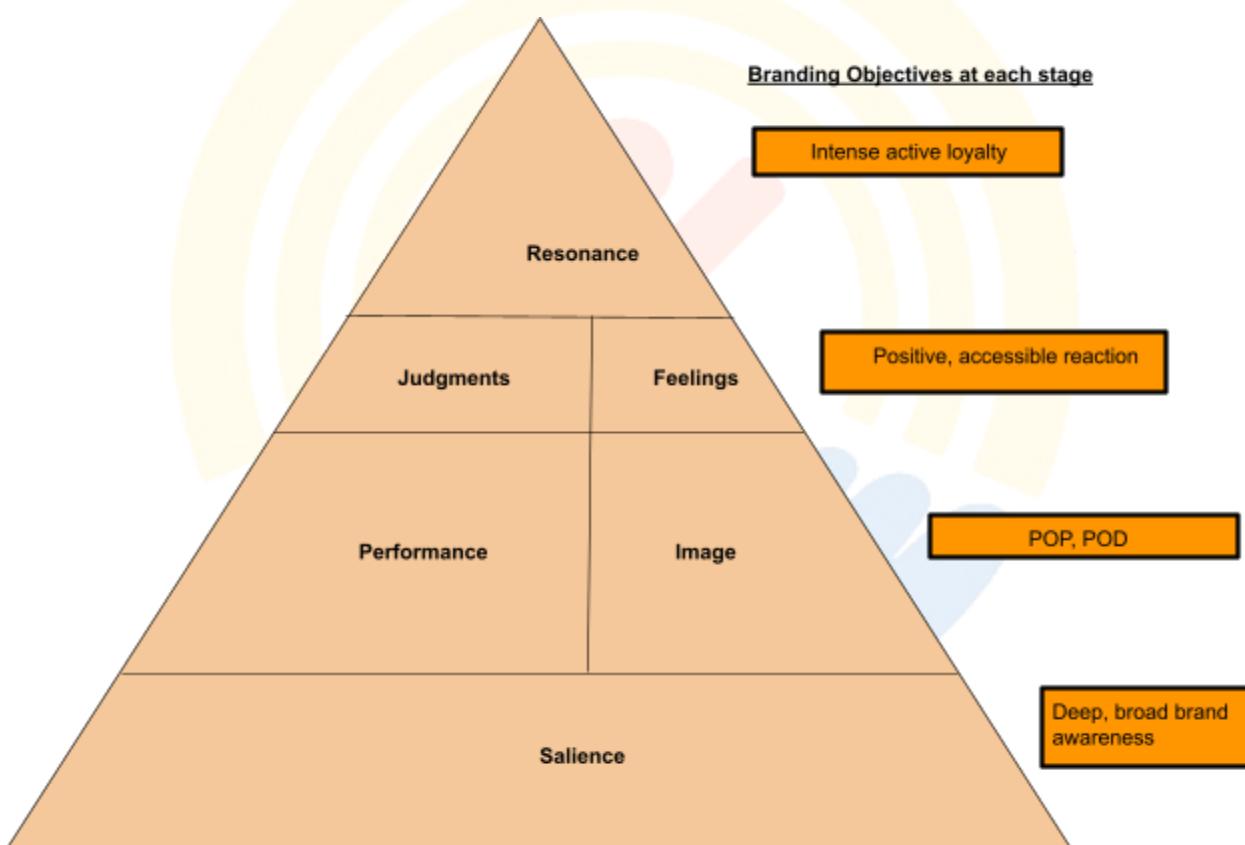
<https://uwlfayette.org/about-us/>

## 3.7 Brand Resonance Pyramid

### Introduction:

The Brand Resonance Pyramid, created by marketing expert Kevin Lane Keller, is a model designed to elucidate how brands cultivate meaningful relationships with their customers. This hierarchical framework illustrates the process through which consumers establish connections with a brand and how these connections drive brand loyalty and advocacy. The pyramid consists of four distinct stages, each representing a different level of brand development.

### Framework:



### Analysis:

**Salience:** United Way is widely recognized as a major non-profit organization dedicated to improving communities through various initiatives like education, health, and financial stability.

The brand's salience is high due to its extensive network, long history, and significant visibility in fundraising campaigns.

**Performance:** The organization is known for its effective allocation of resources and its impact on local communities. The United Way's performance is evaluated based on its ability to fund and support impactful programs and services.

**Image:** The imagery associated with United Way emphasizes community support, collaboration, and positive change. The brand is often visualized through its logo, campaigns, and the stories of individuals and communities benefiting from its work.

**Judgments:** Public perception of United Way often involves judgments about the organization's credibility, effectiveness, and transparency. Stakeholders assess how well United Way meets its mission and manages its resources.

**Feelings:** United Way aims to evoke emotions such as empathy, hope, and a sense of community. The brand seeks to inspire donors and volunteers to feel emotionally connected to the causes they support.

**Resonance:** The ultimate goal for United Way is to achieve a deep level of resonance where supporters are not just donors but active advocates for the organization's cause. This includes high levels of loyalty, ongoing engagement, and personal advocacy.

### **Recommendations:**

- Boost United Way's visibility by leveraging a range of media channels and community events. Allocate resources towards targeted advertising and digital marketing efforts to attract both new and current supporters.
- Ensure that funds are used efficiently and transparently. Regularly review and optimize processes to maximize impact and address any areas of concern.
- Strengthen storytelling by showcasing impactful stories of individuals and communities benefited by United Way's initiatives. Utilize various multimedia formats to capture and engage a wider audience.
- Develop personalized communication strategies that address the specific interests and passions of supporters. Use segmentation to personalize messages and engagement opportunities.
- Build a sense of community among supporters through events, online forums, and volunteer opportunities. Facilitate connections between supporters to strengthen their bond with the organization and each other.

## **References:**

- <https://smartamarketing.wordpress.com/2012/01/05/what-is-brand-salience/>
- <https://link.springer.com/article/10.1023/A:1009886520142>

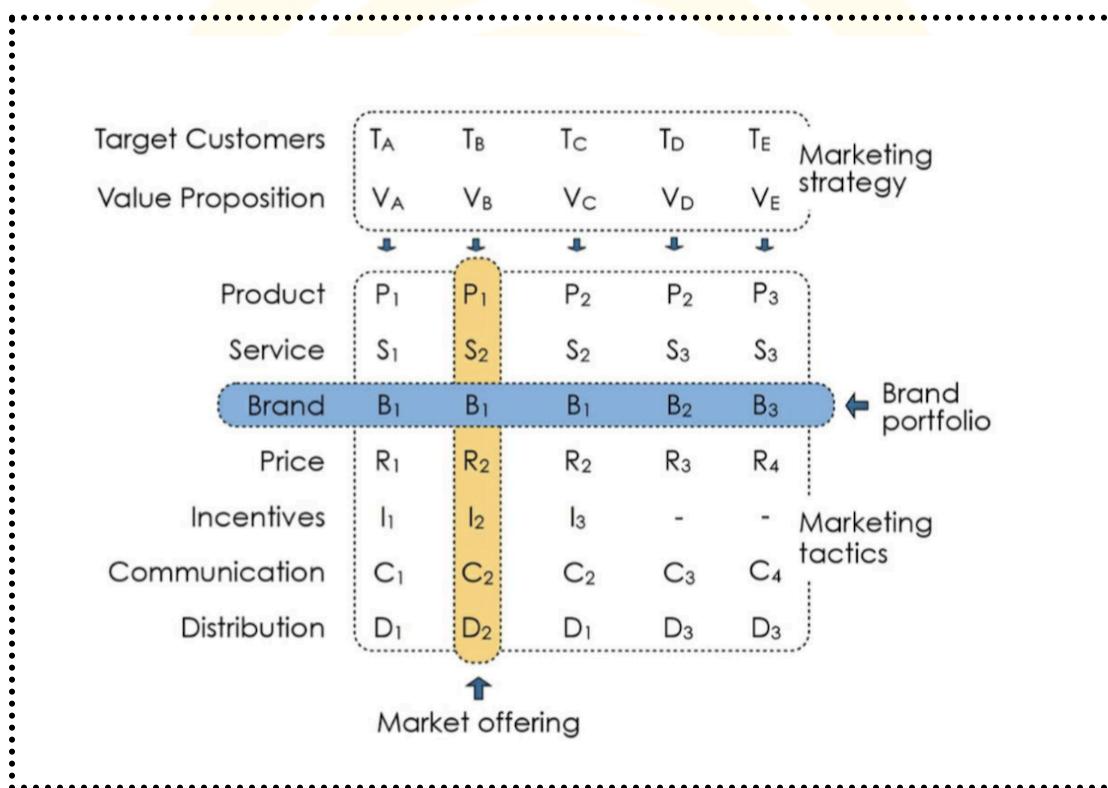


## 3.8 Brand Portfolio

### Introduction:

A brand portfolio refers to the collection of all the brands or brand lines that a company offers, designed to meet the needs of various market segments. In simpler terms, it includes all the brands a firm sells to address the preferences of different customer groups. A brand portfolio is usually developed because each brand has limitations and can't meet every segment's needs.

The benefit of having a brand portfolio is that management can oversee the entire set of brands and make decisions with a broader outlook. Additionally, resources can be directed toward the brands that need the most support.



***Brand Portfolio Model - Daniels School of Business***

Using the model provided from the Daniels School of Business, we can build the brand Portfolio for UWGL that can be visualized as two interconnected parts. The upper section focuses on the marketing strategy, which includes identifying the target customer and crafting a value proposition. This strategy outlines the different market segments, both existing and potential. The lower section represents the specific market offerings designed for each target

customer. These offerings are shaped by the 4Ps of marketing: product, price, promotion, and place.

Target Customers	Mid-career Professionals (25-44 yrs)	Retirees (55+)
Value Proposition	Helping create lasting community impact through engagement and financial support opportunities.	Enabling retirees to give back to their community through meaningful volunteers and donations, creating a legacy of care.
Market Offering	Improving the quality of life for individuals and families in the community by addressing key issues such as education, income stability, and health.	Improving the quality of life for individuals and families in the community by addressing key issues such as education, income stability, and health
Products	N/A	N/A
Service	Opportunities for volunteering, mentoring, and supporting community initiatives	Volunteer programs tailored for retirees and recognition for continued community involvement.
Brand	N/A	N/A
Price	Flexible donation options, with tailored amounts based on ability to give.	Retirement-friendly donation plans and legacy giving options.
Incentives	Introduce donor matching programs through employers or offer exclusive networking events for mid-career professionals who donate.	Highlight tax advantages of legacy donation programs where retirees can leave a long-term impact through estate planning or memorial donations.
Communication	Use engaging digital content, such as short videos showcasing the impact of their donations, and create interactive campaigns like social media challenges to boost involvement.	Focus on personal storytelling, with direct mail or face-to-face contact, emphasizing how retirees can leave a lasting legacy in their community.

Distribution	Digital channels (website, social media), corporate partnerships for events and campaigns.	Mail, community events, and partnerships with local retirement organizations..
--------------	--	--

### **Analysis:**

The market offering analysis for UWGL, targeting mid-career professionals and retirees, highlights distinct opportunities for engagement. For mid-career professionals, digital channels like social media and targeted email campaigns are crucial for driving engagement. Incentives such as corporate matching and networking events can appeal to this group's desire for social impact and career development. For retirees, more personal outreach methods, such as personalized letters and recognition at community events, are effective in fostering a sense of legacy and long-term commitment.

While both target groups value community impact, their motivations and preferred communication channels differ. Mid-career professionals lean toward convenience, impact metrics, and career-related incentives, whereas retirees focus more on legacy, personal connection, and recognition.

### **Recommendations:**

Enhanced Targeted Communications	Expand Incentives	Leverage Partnerships
<ul style="list-style-type: none"> <li>• For mid-career professionals, invest in dynamic, interactive content like videos and social media challenges to engage them where they are most active.</li> <li>• For retirees, continue using personalized letters and host exclusive recognition events to make them feel valued and connected to the cause.</li> </ul>	<ul style="list-style-type: none"> <li>• Implement more employer-driven donation matching programs for mid-career professionals.</li> <li>• For retirees, offer legacy giving programs that allow them to see the long-term impact of their donations, possibly through estate planning or named funds.</li> </ul>	<ul style="list-style-type: none"> <li>• Strengthen partnerships with local businesses to promote giving through corporate social responsibility (CSR) programs for professionals.</li> <li>• Engage with senior organizations and retirement communities to create volunteer opportunities and foster ongoing engagement with retirees.</li> </ul>

**References:**

[https://businessjargons.com/brand-portfolio.html#google\\_vignette](https://businessjargons.com/brand-portfolio.html#google_vignette)

<https://uwlfayette.org/about-us/>



## 4.1 Brand Personality

---

**Introduction:** Your brand is more than just your logo and color palette; your brand is an experience that communicates the essence of what you represent. And like people, each great brand has a personality – your brand personality traits. It's one of the many elements of your brand architecture. Your brand's personality and voice are what allow your business to make a personal connection with your audience. Just as people have values, goals, beliefs (and even flaws), so do organizations.

When you're developing your brand strategy, identifying human personality traits can help crystallize the experience you want to deliver. Human personality traits are a powerful element that can help you win the mindshare you want to own (to be known for that certain something). People want to see the humanity within a business. You'll also be able to use your brand personality traits as a check-and-balance mechanism for your campaign creative and messaging. And, if you conduct a brand audit and find that your brand personality traits aren't what you're hoping for, you have an opportunity to change them.

**Framework:**



## **Analysis:**

- Inclusive - UWGL exemplifies inclusivity through its unwavering commitment to making everyone feel welcome and valued. Their approach is designed to embrace individuals from all backgrounds and walks of life, ensuring that each person feels like a crucial part of their mission, whether they are a donor, advocate, or volunteer. By fostering an environment where everyone feels accepted and encouraged to participate, UWGL builds a strong sense of community and belonging.
  - Example: UWGL highlights their commitment to diversity and inclusivity through various programs and initiatives that cater to different community needs.
- Warm - The brand exudes warmth through its communications and interactions. Their friendly and approachable demeanor is evident in their messaging and community outreach, making individuals feel welcomed and valued. This warmth fosters a supportive environment and builds strong emotional connections with their audience.
  - Example: The website features heartfelt stories and testimonials from community members and beneficiaries. These personal narratives reflect a warm and caring tone, showcasing the impact of their work on individuals' lives.
- Friendly - UWGL maintains a friendly tone in its interactions and messaging. Their approachable nature is reflected in their easy-to-navigate website, personal stories, and community events. This friendliness helps to create a positive and inviting atmosphere for engagement.
  - Example: UWGL uses a conversational and approachable tone in their content. Their website is user-friendly, with easy navigation and accessible information about their programs and services. The friendly tone is evident in their blog posts, event descriptions, and call-to-action sections, making it easy for users to connect with the organization.
- Engaging - The organization is highly engaging, actively involving community members in their efforts and encouraging participation. This engagement is key to building lasting relationships and fostering community support.
  - Example: Event calendars, volunteer-signup forms, and donation portals that actively involve users are all interactive elements. They also use engaging visuals and infographics to present data and success stories, encouraging visitors to interact with the content and participate in community activities.

- Compassionate - Compassion is at the core of UWGL's personality. Their initiatives and communications are driven by a genuine concern for the well-being of individuals and communities.
  - Example: Compassion is a central theme in the stories and updates shared on their website. They highlight various programs that address urgent community needs, such as food assistance and emergency support, and share detailed accounts of how these efforts positively impact individuals.
- Collaborative: Collaboration is a fundamental aspect of their approach. United Way of Greater Lafayette works closely with various stakeholders, including local organizations, businesses, and volunteers, to achieve common goals. Their collaborative spirit is crucial for leveraging resources and maximizing impact in the community.
  - Example: The website showcases partnerships with local businesses, nonprofits, and other community organizations. They provide information on collaborative projects and joint initiatives that leverage collective resources to address community challenges.
- Grassroots: The brand's grassroots nature reflects its commitment to community-driven efforts. United Way of Greater Lafayette focuses on local, ground-level initiatives that directly address community needs. This grassroots approach ensures that their efforts are relevant and effective, rooted in the actual experiences and challenges faced by local residents.
  - Example: UWGL emphasizes grassroots involvement through local fundraising events, neighborhood programs, and volunteer opportunities. Their website includes features that spotlight local events and initiatives, illustrating their focus on community-driven efforts and local impact.
- Community-Driven: Being community-driven is central to United Way of Greater Lafayette's identity. Their strategies and initiatives are designed with the community at the forefront, aiming to empower and uplift local residents. This trait underscores their dedication to creating positive change through direct, community-focused actions.
  - Example: The website prominently features the voices of local residents and community leaders, highlighting their active role in shaping the organization's efforts. They include sections dedicated to community impact, showcasing how their work aligns with the needs and priorities of the Greater Lafayette area.

## **Recommendations:**

We strongly recommend United Way Greater Lafayette to focus more on grassroots, community-driven initiatives rather than top-down approaches. They have already taken steps to engage local stakeholders, which is a great foundation for building stronger community connections. Expanding on this by creating programs that directly involve residents in decision-making and project execution would give United Way a unique edge in fostering deep-rooted community engagement that other organizations may not offer in the region.

## **References:**

- <https://medium.com/ebaqdesign/brand-personality-traitsof-top-brands-19c58890770f>
- <https://www.ignytebrands.com/the-psychology-of-brand-personality/>
- <https://www.vistaprint.com/hub/understanding-brand-personality>
- <https://www.delve.ai/blog/brand-personality#blog-define-brand-personality>

## 4.2 Brand Names

---

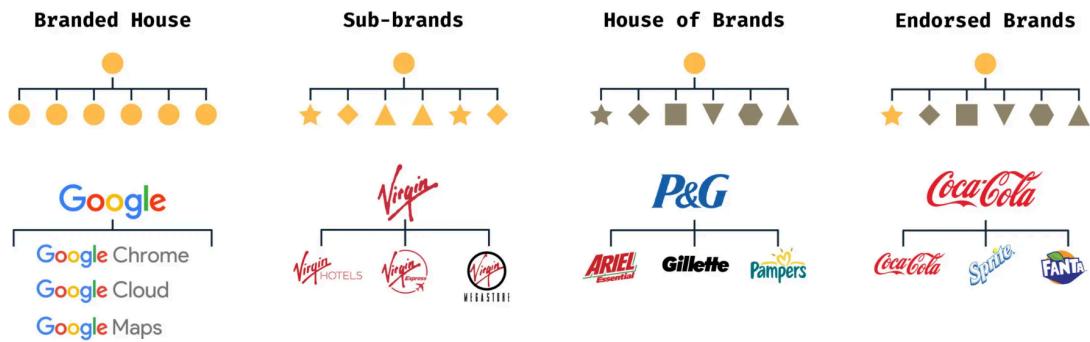
### Introduction:

A brand name acts as a vital link between an entity and its target audience. It expresses the brand's basic beliefs, purpose, and promise, and plays an important role in distinguishing it from rivals. Given its dedication to social impact and community assistance, the United Way of Greater Lafayette values a deliberate brand naming approach. A well-crafted brand name may communicate the organization's goal, elicit emotional responses, and improve memory among contributors and volunteers. This worksheet provides a brand name framework designed specifically for United Way's many programs and services, assisting the organization in adopting a consistent and unified naming strategy that builds brand equity.

### Framework:

United Way's brand portfolio includes a variety of initiatives that target different demographics and causes. We recommend using a Branded House strategy, in which all sub-brands and projects are tied to the core United Way name, resulting in cohesion throughout its services. The framework includes the following elements:

- **United Way Core Brand** - The United Way Core Brand expresses the organization's fundamental beliefs and objectives.
- **Program-Specific Names** - Each program should have a distinct identity that relates to the United Way name. Examples may be "United Way Youth Impact" or "United Way Community Health."
- **Naming Hierarchy** - Each sub-brand's name will be organized to represent its emphasis area, allowing stakeholders to easily identify relevant initiatives.
- **Visual and Verbal Identity Alignment** - Logos, colors, and taglines should be used consistently across all mediums to provide seamless brand awareness.



This Branded House concept enables sub-brands to benefit from the power and trust of the primary United Way brand while keeping program-specific identities.

### Analysis:

The Branded House concept provides various benefits to the United Way. First, it emphasizes the organization's fundamental objective across several activities, boosting brand equity and trustworthiness. United Way can increase donor, volunteer, and community memory by developing a consistent name system.

For example, programs like "United Way Community Health" might gain immediate awareness by closely connecting with the main brand while indicating a special focus on healthcare efforts. Similarly, "United Way Youth Impact" can showcase initiatives for young people while being aligned with the greater United Way objective.

An important assumption here is that sub-brands share the parent brand's values. Program titles should represent the fundamental goal. United Way can avoid confusion and foster greater engagement through this streamlined, transparent approach.

### Recommendations:

To improve its brand portfolio, the United Way should:

- **Create a Naming Guide** - Set clear criteria for naming future initiatives so that they are consistent with the main brand and easy to comprehend for stakeholders.
- **Conduct Market Research** - Assess donor and volunteer views to ensure that the new brand names connect with the community and boost involvement.

- **Leverage Emotional Connection** – Incorporate language that invoke the principles of caring, influence, and support into program names, such as "United Way Empowerment Fund" or "United Way Giving Hope."
- **Focus on Consistency** - Maintain high brand identification by ensuring consistent name and branding throughout all communication platforms, including as websites, social media, and print materials.
- **Test for Clarity** – Before launching new brand names, conduct focus groups and surveys to ensure the names are clear, easy to pronounce, and memorable.

### **References:**

United Way of Greater Lafayette Website ([www.uwlafayette.org](http://www.uwlafayette.org))

Chernev, A. (2020). Strategic Brand Management. Cerebellum Press.

Aaker, D. A. (2014). Aaker on Branding: 20 Principles That Drive Success. Morgan James Publishing.

## 4.3 Brand Logo

---

### **Introduction:**

The purpose of a logo is to effectively communicate United Way Greater Lafayette's mission and values while establishing a unique and recognizable identity in the nonprofit sector. A well-designed logo should instantly convey the organization's purpose and resonate with its target audience. When someone sees the United Way logo, they should immediately understand the organization's commitment to community, inclusivity, and support, and feel a connection that encourages their participation in the cause.

### **Framework:**

The United Way logo represents the organization's mission of community support, unity, and care. The central symbol of a hand under a rainbow conveys a sense of protection, hope, and helping others. The warm, vibrant color palette of red, yellow, and blue reflects energy, compassion, and inclusivity, embodying United Way's core values of bringing people together to improve lives and uplift communities. The logo is a recognizable emblem of trust, collaboration, and positive change.



**United Way's Current Log**

## **Analysis:**

Dimension	Analysis
Friendly vs. Formal	Balances warmth and professionalism through red and yellow colors, alongside a formal, structured design.
Quirky vs. Conventional	Leans toward conventional design with familiar symbols like the hand and rainbow, reinforcing trust and tradition.
Modern vs. Classic	Combines modern clean lines with traditional imagery, though subtle updates could keep it more relevant.
Fun vs. Functional	Primarily functional, focusing on clear messaging. Adding dynamism could better engage younger audiences.
Inclusive vs. Exclusive	Uses universal symbols (hand, rainbow) to promote inclusivity and community, aligning with the brand's mission.
Warm vs. Cool	The warm palette of red, yellow, and blue fosters energy and compassion, creating an emotional connection.
Innovative vs. Familiar	The design is highly familiar but less innovative. Modernizing elements could refresh the logo while retaining recognition.

## **Recommendations:**

- Update with Modern Touches: Introduce subtle design enhancements to give the logo a more modern feel while maintaining its classic roots. This could involve refined typography or refreshed colors.
- Incorporate Inclusivity Elements: Consider incorporating visual elements that represent inclusivity, such as diverse figures or community symbols, to reflect the organization's evolving commitment to diversity and equity.
- Explore Fun Elements: To appeal to younger demographics and add vibrancy, consider adding a playful or dynamic element to the logo while keeping it professional and functional.
- Maintain Familiarity: While updates are essential, it's crucial to retain key elements of the existing logo to preserve brand recognition and loyalty among long-term supporters.

## **References:**

<https://www.feelingpeaky.com/5-principles-of-logo-design/>

<https://www.vistaprint.com/hub/principles-of-logo-design>

[https://books.google.com.pr/books/about/Logo\\_Design\\_Love.html?id=dYDtmAEACAAJ&redir\\_esc=y](https://books.google.com.pr/books/about/Logo_Design_Love.html?id=dYDtmAEACAAJ&redir_esc=y)

<https://hbr.org/2019/09/a-study-of-597-logos-shows-which-kind-is-most-effective>



## 4.4 Brand Trademarks

### Introduction:

A trademark is a word, phrase, symbol, or design that distinguishes the goods of one party from those of others. Similarly, a service mark identifies and sets apart the provider of a service rather than a product. Brand names, slogans, and logos are common examples of trademarks and service marks. The term "trademark" is often used broadly to encompass both types.

Unlike patents and copyrights, trademarks don't have a set expiration date. Their protection arises from the actual use of the mark (see below). As long as you continue using the mark in commerce to represent the source of goods or services, it can last indefinitely. Trademark registrations can also be renewed indefinitely, provided that specific filings and fees are submitted at regular intervals.

### Framework:



United Way uses this trademark on all materials related to its business nationwide. United Way of Greater Lafayette specifically uses their city name when referring to their specific practice.

Along with the logo, United Way utilizes the colors of blue, red, and yellow to make them stand out around the community.

### Analysis:

United Way's trademark is a good brand strategy to ensure that they own their specified branding and logo long-term.

Trademarks are crucial as they allow consumers to recognize and differentiate brands in a crowded market. They also help protect against unauthorized copying or misuse of another's work, ensuring that brand identity and originality are preserved.

### **Recommendations:**

It is essential to ensure that all of United Way's materials are trademarked to protect its brand identity and prevent others from using or imitating its logos, slogans, and designs. Trademarking helps establish exclusive rights, which strengthens brand recognition and trust in the marketplace.

Once a logo is trademarked, it can be used beyond traditional marketing, such as on branded apparel, merchandise, or promotional materials, further enhancing brand visibility and creating additional revenue streams through licensed products or partnerships. Free branded giveaways can also help increase brand visibility and awareness.

### **References:**

<https://uwlafayette.org/>

<https://www.facebook.com/uwlafayette/>

[https://www.google.com/url?sa=i&url=https%3A%2F%2Fwww.youtube.com%2Fchannel%2FU\\_Ck7w89CvTuJdC7HmuPaA8FA&psig=AOvVaw2uUiSB\\_MdHGiWIskEhDMP8&ust=1726780171041000&source=images&cd=vfe&opi=89978449&ved=0CBQQjRxqFwoTCPDhv9WzzYgDFQAAAAAdAAAAABAE](https://www.google.com/url?sa=i&url=https%3A%2F%2Fwww.youtube.com%2Fchannel%2FU_Ck7w89CvTuJdC7HmuPaA8FA&psig=AOvVaw2uUiSB_MdHGiWIskEhDMP8&ust=1726780171041000&source=images&cd=vfe&opi=89978449&ved=0CBQQjRxqFwoTCPDhv9WzzYgDFQAAAAAdAAAAABAE)

## 4.5 Brand Soundmarks

### Introduction:

Brand soundmarks are audio cues or sounds associated with a brand that help reinforce its identity and build the connection with the audience. These can include a range of audio elements such as jingles, sonic logos or unique sound effects. Just like visual logos, soundmarks serve to evoke particular emotions or associations when people hear them.

### Framework:

United Way currently does not have a soundmark. But creating a soundmark for United Way could indeed be a great way to enhance its brand identity and create a memorable audio signature. The below soundmark of “The Power of Positivity” has the potential to do that. Given United Way's mission of community support and positive change, the soundmark should evoke feelings of warmth, unity, and hope.

### Analysis:

#### **Soundmark Name: “The power of positivity”**



**Relevance to Brand Identity:** The “Power of Positivity” aligns well with United Way’s mission by evoking a sense of hope and community through its uplifting and warm tones.

**Memorability:** The use of a simple, ascending tune followed by a gentle melody makes it distinctive and memorable. The short duration helps in retaining the sound in the listener’s mind.

**Emotional Impact:** The soundmark is designed to be soothing and supportive, effectively evoking positive emotions and aligning with the brand’s values of community and support.

**Sonic Characteristics:** The chosen elements (piano melody) are appropriate for conveying warmth and unity. The tone and rhythm support the brand’s image of being caring and inclusive.

Usability: The soundmark's brief duration and versatile nature make it suitable for various media, from digital content to event usage. Primarily when reinforcing positive stories of how the donations are changing lives. Storytelling clips could be a great place to utilize the tune.

Market Testing: Positive feedback from the target audience indicates that the soundmark resonates well and effectively represents the brand.

Legal Considerations: Ensuring the “The Power of Positivity” is unique and can be trademarked would help protect it as a distinct brand asset.

### **Recommendations:**

#### **1. Align with Brand Values**

- Community Support: The Power of Positivity tune evokes feelings of collaboration and unity.
- Positive Change: It uses uplifting and hopeful tones to reflect the organization's mission to improve lives.
- Warmth and Comfort: It evokes a sense of care and support.
- Hope and Optimism: It would incorporate elements that suggest progress and positive transformation.

#### **2. Memorability**

- **Distinctiveness:** A distinct sound like this will be easily distinguishable from other sounds and could stand out in the market in the non-profit space.
- **Catchiness:** It could be catchy that the listeners can easily make a connection with the brand.

#### **3. Emotional Impact**

- **Emotional Resonance:** The soundmark could evoke the desired emotional response for United Way donors, such as hope, warmth, and unity.
- **Engagement:** It engages the listeners and creates a positive association with the brand.

### **References:**

<https://sonicminds.dk/audio-branding-how-does-your-brand-sound/>

<https://www.brandingmag.com/david-placek/the-science-of-sound-symbolism-and-the-importance-of-your-brand-name/>

## 4.6 Brand Character

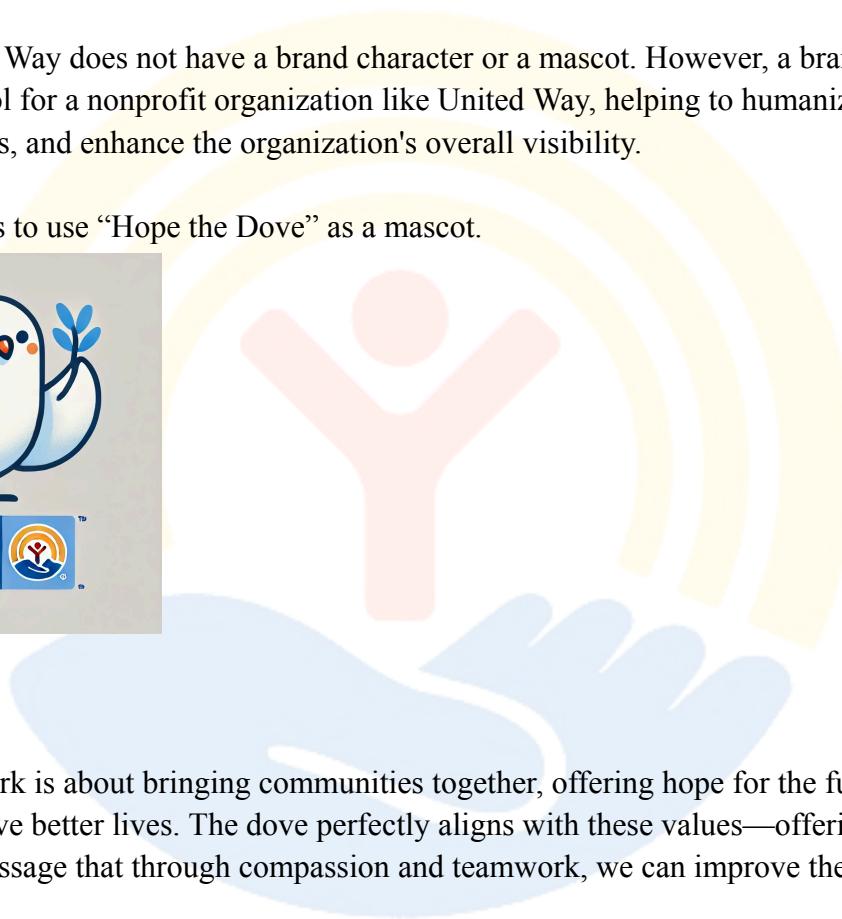
### Introduction:

A brand mascot is a character or figure used by a company or organization to represent its brand and connect with its audience in a memorable and engaging way. The mascot often embodies the brand's values, personality, and mission, and serves as a visual and emotional symbol that people can relate to and remember.

### Framework:

Currently United Way does not have a brand character or a mascot. However, a brand mascot can be a powerful tool for a nonprofit organization like United Way, helping to humanize the cause, engage supporters, and enhance the organization's overall visibility.

One suggestion is to use “Hope the Dove” as a mascot.



### Analysis:

United Way’s work is about bringing communities together, offering hope for the future, and helping people live better lives. The dove perfectly aligns with these values—offering peace, unity, and the message that through compassion and teamwork, we can improve the lives of many.

By choosing a dove, United Way can use its strong, positive symbolism to reinforce its mission in a way that is universally recognized and appreciated.

The design also features soft, rounded features and a small olive branch, symbolizing peace and humility. The United Way colors are subtly incorporated into a small ribbon on the dove's chest, keeping the overall feel gentle and modest while maintaining a hopeful presence.

## **Hope's Backstory:**

Once, there was a small dove named Hope who lived in a diverse forest where different animals faced challenges—whether it was finding food, shelter, or simply feeling like they belonged. Despite their differences, the animals began to work together, understanding that by uniting their efforts, they could achieve more. Hope was inspired by this unity and became a symbol of their shared goals. With each flap of her wings, she spread messages of peace, collaboration, and compassion throughout the land.

One day, Hope discovered a community of people who, much like the animals in her forest, needed help but didn't realize how powerful they could be when they came together. So, Hope began visiting towns and cities, teaching them the power of unity. She became a messenger for the United Way, helping people understand that together, they could create lasting change—whether by improving education, health, or financial stability. Everywhere she flew, Hope left behind a spark of optimism and belief in a brighter future.

## **Recommendations:**

Utilizing “Hope the Dove” in campaigns can be an effective way to associate United Way with charity and help raise funds to support different causes.

### **1. Educational Materials:**

- Children's Programs: Hope can lead educational materials for children, introducing them to community service, kindness, and the value of helping others.
- Storybooks and Animations: Develop a short storybook or animated series for younger audiences where Hope helps different communities solve problems by coming together.

### **2. Fundraising Campaigns:**

- Hope's Flight for Change: A campaign could be built around the idea that each donation helps Hope fly further and reach more communities in need. For every milestone, Hope “lands” in a new place and brings hope to those who need it most.
- Merchandise: Plush toys, pins, or other memorabilia of Hope could be sold to support United Way fundraising efforts. For every item purchased, Hope “spreads her wings” a little further, symbolizing the expansion of positive impact.

### **3. Social Media and Digital Presence:**

- Hope's Journey: Create an interactive map where followers can track Hope's journey as she “flies” to different communities. This could showcase real stories of impact from United Way's work in various regions.
- Inspiration Quotes: Use Hope as a source of inspiration by sharing weekly quotes or messages of kindness, hope, and unity.

4. Events and Public Engagement:

- Meet Hope: Hope can be a mascot at public events like charity runs, volunteer drives, and community celebrations, offering a physical embodiment of United Way's work.
- Hope's Helpers: Kids can sign up to be "Hope's Helpers," taking part in small acts of community service or creating fundraising events to support their local United Way chapters.

5. Ambassador of Stories:

- Hope's Stories of Change: Use Hope as the narrator for sharing success stories of individuals and families who have been positively impacted by United Way. Hope could be the voice that ties together the theme of community action and support.

6. Tagline

"Hope in Action"

**References:**

<https://blog.hubspot.com/marketing/brand-character#:~:text=A%20brand%20character%2C%20or%20mascot,other%20character%20of%20your%20choosing>

<https://brandingtheblog.wordpress.com/2018/10/23/brand-identity-the-visual-and-verbal-language-of-dove/>

## 4.7 Brand Colors

---

### Introduction:

Colors speak louder than words. The United Way of Greater Lafayette's trademark colors serve as a visual statement of its mission—uniting the community to generate meaningful change. Brand colors go beyond logos, eliciting emotional connections with audiences and ensuring awareness across many touchpoints. As a non-profit dedicated to improving people's lives, it is critical to utilize colors carefully to reflect core brand characteristics such as trust, unity, empathy, and action.

This worksheet is intended to assist United Way in selecting colors that effectively communicate its personality and fundamental objective. By combining visual components with emotional resonance, United Way may build stronger bonds with supporters, partners, and the larger community.

### Framework:

Understanding the brand's personality and beliefs is the first step in creating a strong emotional connection with the community via color. Here's a step-by-step tutorial to this process:

- Identify the brand personality - The United Way of Greater Lafayette's personality is built on community service, trust, and a desire for good change. These ideals should guide all design decisions, particularly the color palette.
- Core Brand Color Selection - United Way's brand already incorporates blue (trust, reliability), yellow (optimism, warmth), and red (passion, action). These colors properly represent the organization's principles, but they may be tweaked to guarantee adaptability and emotional resonance across other mediums.
  - **Blue** represents trust and reliability, two key characteristics of a community-focused enterprise.
  - **Yellow** symbolizes optimism and warmth, conveying a welcome and cheerful tone.
  - **Red** represents passion and action, highlighting the organization's dedication to make a difference.

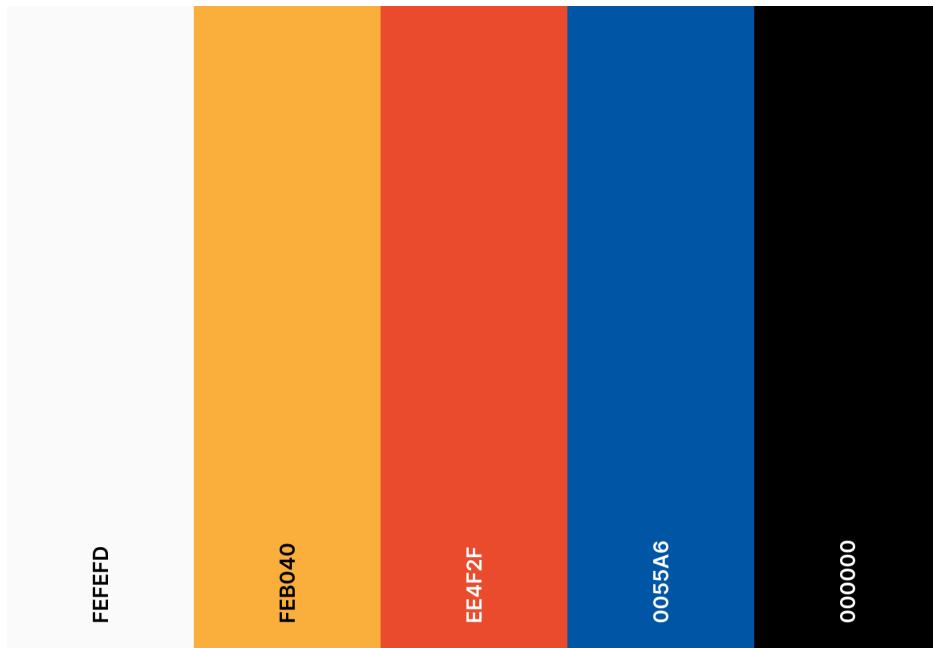
- Developing a Color Scheme - While blue, yellow, and red serve as the identity's anchor colors, other accent colors such as white (purity, clarity) and gray (neutrality, balance) may provide depth to marketing materials, improving both print and digital assets.

A basic approach to these accents ensures that the main colors capture the audience's attention, establishing brand consistency across platforms.



## **Analysis:**

Colors are used not just for aesthetic reasons, but also to link emotions with the United Way's objective. Each hue used in marketing materials may evoke a certain emotional reaction, and knowing color psychology allows United Way to better express its message:



**Blue** establishes trust. Trust is essential for every organization that relies on donations, partnerships, and volunteer assistance. Blue's soothing influence also promotes a perception of stability and dependability, giving stakeholders confidence in the firm.

**Yellow** symbolizes the hope that United Way offers to the community. Yellow shines out in communications, putting optimism at the center of the story. Its brightness also draws attention and promotes participation.

**Red** inspires action. Red evokes urgency and enthusiasm, whether it's a contribution request, an invitation to help, or a celebration of accomplishment. It is the beating core of United Way's identity, emphasizing the organization's commitment to long-term transformation.

Consistency is essential. Maintaining consistency across digital platforms, events, reports, and marketing materials ensures that the brand is easily recognized. This is critical for community participation, building trust, and establishing long-term partnerships. Using these colors harmoniously in website design, social media, annual reports, and promotional efforts ensures that the United Way's ideals are properly communicated.

## **Recommendations:**

While United Way's existing color palette is powerful, modest changes might increase its impact:

- **Introduce Deeper Shades:** Consider using darker hues of blue for backdrops or serious material to increase trust, particularly for fundraising or long-term change projects.
- **Leverage Accent Colors:** Using soft accent colors, such as light gray, may assist balance out cluttered graphics and highlight the essential colors. Green (growth, regeneration) might also be used sparingly in environmental or educational activities, supporting United Way's goals to create a flourishing, empowered community.
- **Cross-Cultural Sensitivity:** To better serve a varied audience, it's necessary to consider color perceptions across cultures. For example, red might represent affluence in certain cultures but danger in others. Conducting localized study on color meaning can aid in fine-tuning branding for resonance across all populations.
- **Brand Consistency in Digital Spaces:** Maintaining brand consistency in digital spaces is crucial as online interaction grows. Colors should show consistently across devices. Testing how colors appear on smartphones, tablets, and desktops will ensure that the message stays visually impactful regardless of platform.

## **References:**

- **Wheeler, A. (2017).** *Designing Brand Identity: An Essential Guide for the Whole Branding Team* (5th ed.). John Wiley & Sons.
- **Lidwell, W., Holden, K., & Butler, J. (2010).** *Universal Principles of Design* (2nd ed.). Rockport Publishers.
- **Morton, J. (2015).** *Color Matters: How to Choose the Right Colors for Your Brand*. Phaidon Press
- **Eiseman, L. (2000).** *Pantone Guide to Communicating with Color*. North Light Books.
- **Keller, K. L. (2013).** *Strategic Brand Management: Building, Measuring, and Managing Brand Equity* (4th ed.). Pearson Education.

- **Fraser, T., & Banks, A. (2010).** *Designer's Color Manual: The Complete Guide to Color Theory and Application*. Chronicle Books.
- **Hynes, N. (2009).** *Color and Meaning in Corporate Identity: Using Color Psychology to Design Effective Logos*. *Journal of Marketing Communications*, 15(1), 49-63.



## 4.8 Brand Typography

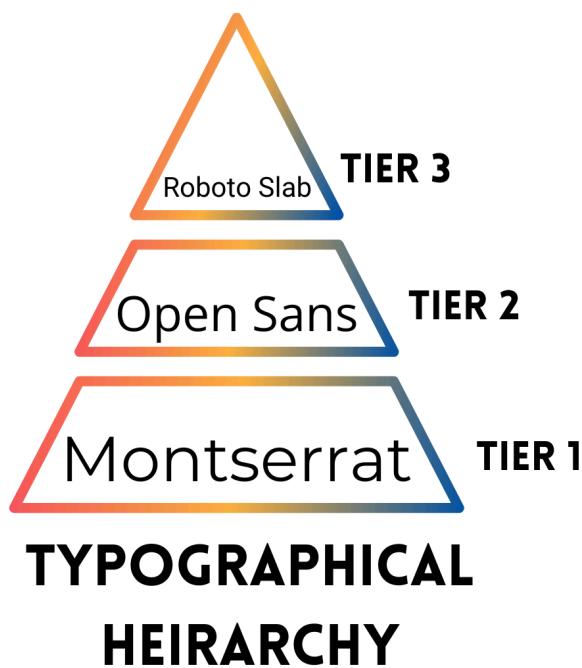
### Introduction:

Typography is more than simply the appearance of words; it represents your brand's voice. The typefaces you choose communicate with your audience before they ever read a single word. Brand typography expresses a company's personality, purpose, and beliefs, making it an essential component of visual branding. The proper typeface complements your message, conveying trust, professionalism, and approachability in all forms of communication.

For the United Way of Greater Lafayette, brand typography is critical to maintaining a consistent identity across different touchpoints, such as print materials, digital platforms, and promotional content. It symbolizes the organization's purpose of achieving community impact via collaborative efforts.

### Framework:

The United Way of Greater Lafayette's brand typography follows a defined hierarchy to promote readability and consistency across platforms. The typographic framework has three levels:



### **Primary typeface:**

- **Font:** Montserrat Regular (sans serif)
- **Function:** Main headers, huge writing in marketing materials, and website banners
- **Why:** Montserrat's contemporary, clean lines represent accessibility and openness, which complements the brand's community-centric aim.

### **Secondary typeface:**

- **Font:** Open Sans (sans serif).
- **Function:** Subheadings, main points in presentations, medium-sized content.
- **Why:** Open Sans complements Montserrat wonderfully, providing legibility at all sizes while keeping the brand's professional tone.

### **Tertiary typeface:**

- **Font:** Roboto Slab (serif)
- **Function:** Accents, quotes, callouts, and special focus areas
- **Why:** Roboto Slab brings a traditional yet flexible touch to typography, ideal for accentuating important information without deviating from the overall brand aesthetic.

### **Analysis:**

The typeface choices represent the particular principles of the United Way of Greater Lafayette. Montserrat's clean, welcoming look complements the organization's inclusive attitude. Open Sans' neutrality and clarity promote readability in both digital and print mediums. Finally, Roboto Slab provides warmth and authority, confirming the organization's reputation as a trusted leader in the community.

The hierarchy formed by these typefaces guarantees that all messages are consistent, whether they are informational flyers, official papers, or digital newsletters. This blend of modernism and heritage helps the United Way of Greater Lafayette preserve brand integrity through its typographic approach.

### **Recommendations:**

To improve the typography's impact:

- **Consistency:** Ensure that Montserrat and Open Sans are utilized in all primary messages, with Roboto Slab kept for particular emphasis.
- **Limit typeface combinations:** Avoid using too many typefaces, since this can clutter the design and dilute the brand message.
- **Use Space and Size thoughtfully:** Maintain adequate space between text lines and appropriate font sizes to improve reading, particularly on mobile devices.
- **Leverage Bold and Italics Sparingly:** Use bold or italic styles sparingly, since too much of them might detract from the typography's clean and professional look.

### **References:**

<https://fonts.google.com/specimen/Montserrat>

<https://fonts.google.com/specimen/Open+Sans>

<https://fonts.google.com/specimen/Roboto+Slab>

<https://www.dotyeti.com/blog/font-psychology-the-importance-of-typography-in-branding>

<https://www.creativebloq.com/how-to/choose-the-right-typeface-for-a-brand>

<https://www.columnfivemedia.com/how-to-find-brand-typography/>

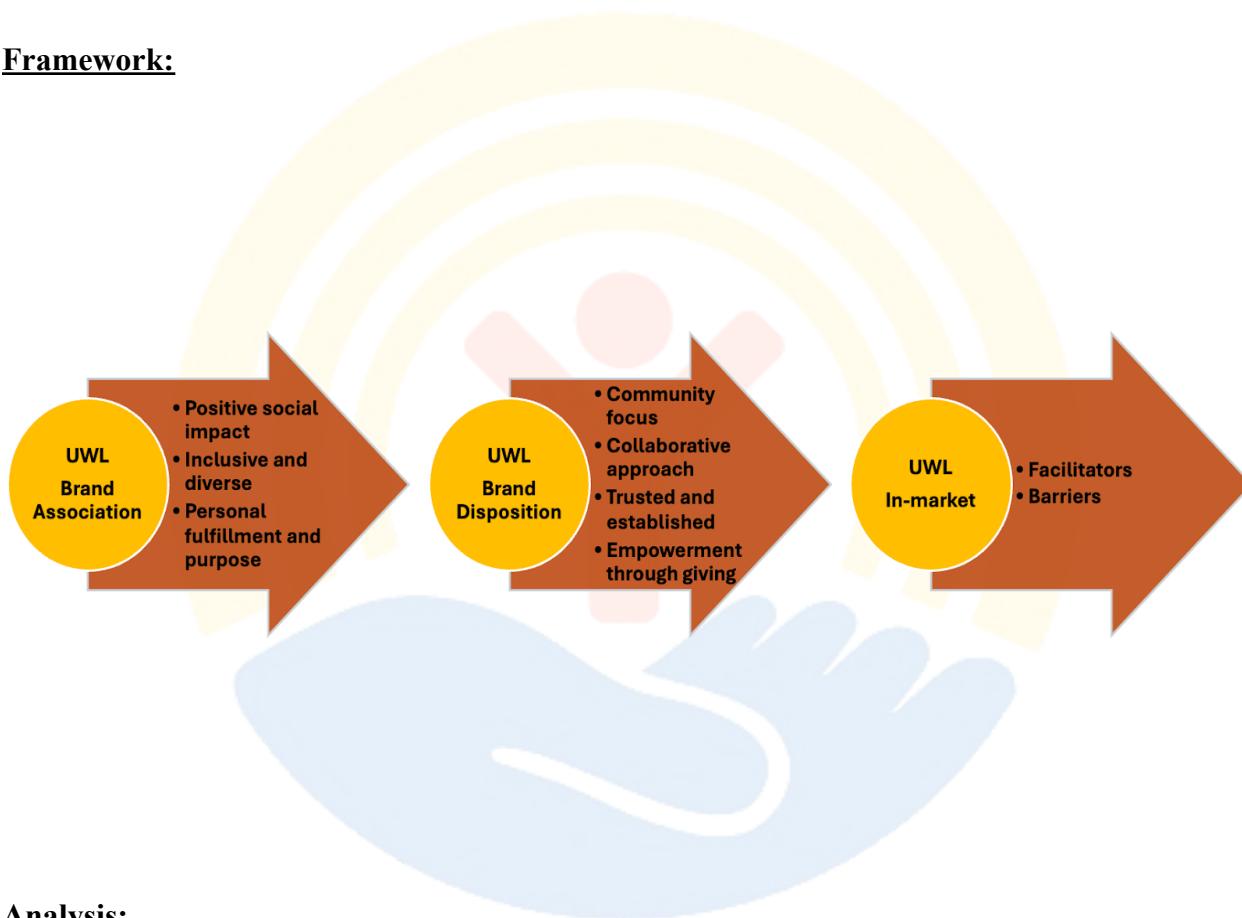
<https://venngage.com/blog/brand-fonts>

## 5.1 Brand Equity Index

### Introduction:

The Brand Equity Index refers to the added value a brand acquires from the perceptions, emotions, and associations it creates among consumers. Key factors influencing brand equity include brand awareness, consumer perceptions, brand image, and overall attitudes toward the brand.

### Framework:



### Analysis:

This diagram illustrates a simplified brand equity framework for United Way Lafayette (UWGL), focusing on three key elements: Brand Association, Brand Disposition, and In-Market factors.

**1. Brand Association:** This pertains to the characteristics that individuals and communities associate with UWGL, including:

- Positive social impact: UWGL is perceived as making a significant contribution to societal welfare.

- Inclusivity and diversity: The brand is recognized for embracing diverse communities and fostering a sense of inclusion.
- Personal fulfillment and purpose: Engaging with UWGL provides individuals with a sense of personal satisfaction and a purpose-driven connection.

**2. Brand Disposition:** This represents how these associations influence the brand's positioning, including:

- Community focus: UWGL is seen as dedicated to improving local communities.
- Collaborative approach: It operates through partnerships with other entities to amplify its impact.
- Trusted and established: UWGL enjoys a reputation as a long-standing, credible organization.
- Empowerment through giving: Donors and volunteers feel empowered by their participation, knowing they are contributing to meaningful causes.

**3. In-Market:** This section refers to UWGL's real-world presence and the factors influencing its performance, such as:

- Facilitators: Positive factors that help UWGL thrive, such as supportive partnerships or a strong community presence.
- Barriers: Challenges UWGL might face in the market like limited social presence, effective mobile optimized messages significantly reduces donorships and donors alike and increase competition for donations or volunteer engagement.

### **Recommendations:**

- UWGL should optimize the usage of digital platforms to engage a wider range of volunteers and appeal to a broader age group.
- UWGL should look to collaborate with local businesses to co-create community impact initiatives together.
- Increase transparency through impact reporting that showcases the direct effect of donations and programs. This could be achieved through infographics, testimonials, and metrics that show how funds are allocated and the results achieved.
- It should engage donors personally by sending thank-you notes, providing updates on the specific programs they supported, or offering exclusive invites to local community events.
- UWGL should improve community storytelling efforts by sharing compelling, human-centered stories from the communities it serves. Highlight specific success stories of individuals or families whose lives have been transformed through UWGL's initiatives.

**References:**

<https://improvado.io/blog/measuring-brand-value-key-metrics>

<https://marketing-mix.net/en/brand-equity-index-bei/>

<https://www.brandequityindex.com/>

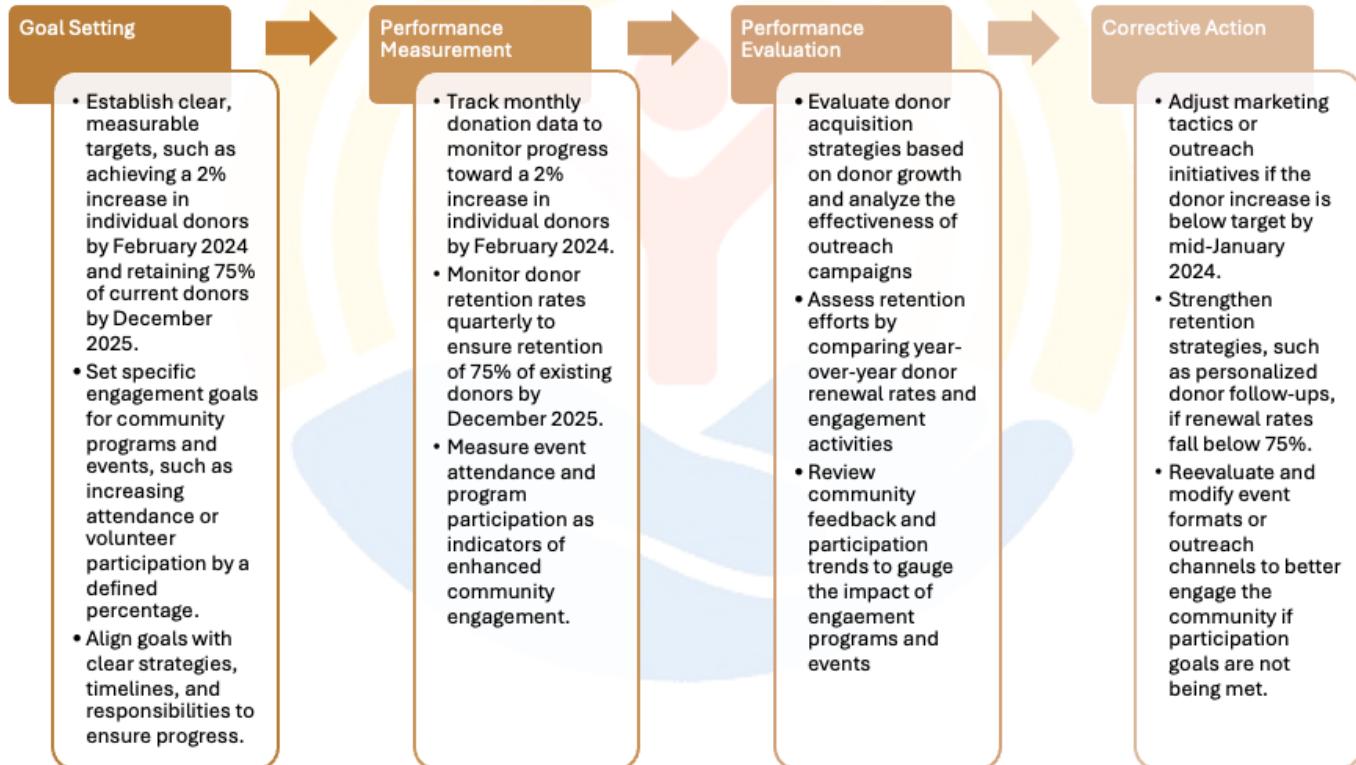


## 5.2 Goal #1 Measurement

### Introduction:

Marketing control is the ongoing process of measuring, evaluating, and monitoring the performance of a marketing plan against set projections. This ensures the plan remains strategically aligned and is on track to achieve its goals. Through regular assessment, marketing control identifies areas where corrective action may be necessary, often targeting tactical elements of the strategy. The observable metrics, or controls, are used to measure performance and guide these adjustments, helping to maintain alignment with the desired outcomes.

### Framework:



## **Analysis:**

This goal-setting framework balances donor acquisition, retention, and community engagement, with clear, time-bound objectives. The 2% donor increase by February 2024 is attainable but requires aggressive short-term efforts in outreach and marketing. It must focus on quality over quantity, attracting donors likely to remain engaged.

The 75% retention by December 2025 goal highlights sustainability, prioritizing personalized engagement to maintain donor relationships. Retention is more cost-effective than acquisition, making it crucial to long-term success. Strategies like tailored communication and exclusive updates can reinforce donor loyalty.

Community engagement through programs and events expands beyond financial metrics, focusing on building trust and lasting relationships. Increasing participation will require diverse events and consistent promotional efforts to engage different segments of the community.

The alignment of strategies, timelines, and responsibilities ensures accountability, but the simultaneous pursuit of multiple goals could stretch resources thin. Flexibility is key, especially with external factors like economic shifts or donor fatigue potentially impacting results.

## **Recommendations:**

**Refine Acquisition Channels:** To meet the 2% donor increase, focus on digital marketing and targeted outreach, leveraging social media and personalized communication.

**Strengthen Donor Retention:** Implement a segmented engagement plan for existing donors, offering tailored follow-ups, exclusive updates, and impact stories to reinforce their commitment.

**Enhance Program Impact:** For community engagement, create a calendar of diverse events and increase promotional efforts to ensure consistent participation and outreach.

**Regular Performance Reviews:** Conduct monthly reviews of donor data and community engagement metrics to identify trends early and adjust strategies as needed.

## **References:**

## F.1 MarCom Table

### Introduction:

The Promotion (MarCom) Project Table is a tool for documenting and organizing numerous marketing communications (MarCom) initiatives under consideration. It enables the United Way of Greater Lafayette to assemble prospective MarCom concepts, ensuring they are not neglected throughout the brand design process. This framework helps to prioritize projects by rating them according to their value, estimated start dates, and compatibility with the organization's objective of improving lives via community mobilization. The table may be sorted by priority to ensure that the most impactful initiatives are completed first, effectively influencing business choices.

### Framework:

Promotion (MarCom) Project Table for United Way of Greater Lafayette

Project	Begin Date	End Date	Description	Target Audience	Objective	Budget	KPIs	Owner	Collaborators	Platform/Channel	Rank	Status
Social Media Campaigns	Dec-24	Feb-25	Targeted ads on Instagram, Facebook, LinkedIn for mid-career professionals.	Mid-career professionals, corporate donors	Increase donor engagement by 15% in 6 months	\$15,000	CTR, Engagement	Marketing Team	Design Team	Social Media	1	Planned
Volunteer Appreciation Program	Jan-25	Ongoing	Personalized emails and impact reports to volunteers.	Existing and past volunteers	Retain 75% of volunteers for recurring events	\$5,000	Open rate, Retention	HR Team	Comms Team	Email	2	Planned
Run United 5K Event Promotion	Feb-25	Apr-25	Promote annual 5K via digital and print media; focus on impact stories.	General public, fitness enthusiasts	Increase participation by 10%	\$25,000	Registrations, Donations	Events Team	Local Media Partners	Digital, Print	3	Planned
Wellness Initiative Marketing	Mar-25	Jul-25	Promote wellness and mental health programs with local healthcare partners.	Retirees, young families, corporate partners	Drive participation in wellness programs	\$12,000	Event attendance, Engagement	Health Team	Healthcare Partners	Digital, Print	4	Planned

Project	Begin Date	End Date	Description	Target Audience	Objective	Budget	KPIs	Owner	Collaborators	Platform/Channel	Rank	Status
Community Storytelling Campaign	Apr-25	Ongoing	Share stories of impact via social media and newsletters to boost trust.	General donors, potential high-value donors	Increase donor trust and transparency	\$8,000	Engagement, Shares	Marketing Team	Content Team	Social Media, Email	5	Planned
Digital Crowdfunding Platform	May-25	Jul-25	Crowdfunding page to attract younger donors, integrated with social media.	Younger donors (18-35), digital natives	Raise \$50K in donations from younger audiences	\$10,000	Donations, CTR	Digital Team	IT Team	Website, Social Media	6	Planned
Local Business Partnerships	Jun-25	Ongoing	Co-branded events and sponsorships with local businesses.	Local businesses, corporate sponsors	Increase corporate engagement and sponsorships	\$20,000	Sponsorships	Partnerships Team	Business Development Team	Digital, In-person	7	Planned
Email Marketing Automation	Jul-25	Ongoing	Automate email campaigns targeting segmented donor lists, delivering personalized impact stories and donation opportunities.	Existing donors, potential new donors	Drive consistent engagement and increase repeat donations	\$6,000	Open rate, Donations	Marketing Team	IT Team	Email	8	Planned
Paid Media Campaigns	Aug-25	Ongoing	Implement search engine ads (SEO/SEM) and sponsored ads on social media to increase brand visibility during major campaigns (e.g., Giving Tuesday).	General donors, first-time visitors to United Way's site	Increase web traffic by 20% and attract new donors	\$18,000	Web Traffic, Conversion Rate	Digital Team	Marketing Team	Search Engines, Social Media	9	Planned

Project	Begin Date	End Date	Description	Target Audience	Objective	Budget	KPIs	Owner	Collaborators	Platform/Channel	Rank	Status
Interactive Web Portal	Sep-2025	Dec-2025	Build an interactive web section where donors and volunteers can see real-time impact of their contributions (graphs, visuals, success stories).	High-value donors, recurring volunteers	Enhance transparency and engagement	\$30,000	User Engagement, Donations	IT Team	Marketing Team	Website	10	Planned

### Analysis:

**Social Media Campaigns:** This effort targets mid-career professionals and corporate funders on Instagram, Facebook, and LinkedIn, where these demographics are most engaged. By creating tailored, visually appealing postings, United Way can enhance donor engagement and event attendance. A strong social media presence will boost brand recognition and trust.

**Volunteer Appreciation Program:** Volunteers are the foundation of United Way's programs. A program centered on individual thank-you emails and impact reports would strengthen their feeling of purpose and commitment, resulting in higher retention. This strategy also improves the entire volunteer experience, increasing their likelihood of returning to future events.

**Run United 5K Event Promotion:** This yearly event will be promoted using a combination of digital (social media, email) and traditional (flyers, local newspaper) marketing to achieve broad reach. Including genuine stories of community impact related to the event fosters an emotional connection and encourages participation.

**Wellness program Marketing:** A wellness program addresses the community's developing mental and physical health requirements. Collaborating with local healthcare providers to market this campaign can broaden United Way's reach and portray it as a comprehensive service provider.

**Community Storytelling Campaign:** Sharing captivating, real-world impact stories through newsletters and social media fosters transparency and trust, which are critical for donor retention. These tales humanize the United Way mission, allowing donors to better appreciate the significance of their donations.

**Digital Crowdfunding Platform:** Younger contributors desire quick and straightforward donation options. A crowdfunding platform that is connected with social media for easy sharing will help attract donations from younger audiences. A defined objective (e.g., raising \$50,000) will encourage participation and create urgency.

**Local Business Partnerships:** Working with local companies on co-branded events increases awareness and produces a win-win situation for both sides. Local businesses benefit from more visibility, while the United Way gains marketing tools and community reputation.

**Email Marketing Automation:** By automating email campaigns, United Way may effectively target diverse sectors of its donor base, assuring tailored and timely interaction. This will encourage more recurring gifts and foster relationships with future high-value contributors.

**Paid Media Campaigns:** Search engine advertisements (SEO/SEM) and sponsored social media ads can reach prospective new contributors looking for ways to give back. This campaign will target high-traffic occasions, such as Giving Tuesday, using tailored keywords and regional demographics.

**Interactive Web Portal:** Building an interactive area on the website that allows donors and volunteers to see the real-time impact of their donations (with graphics, graphs, and success stories) increases transparency and confidence. This is especially tempting to high-value contributors and returning volunteers.

### **Budget Justification:**

- Social media campaigns (\$15, 000): This budget will include paid social media advertisements (Instagram, Facebook, and LinkedIn) for two months, including creative creation and performance tracking. The increased budget enables more comprehensive targeting, higher ad frequency, and expert design services.
- Volunteer Appreciation Program (worth \$5,000): This budget includes email marketing software charges, custom-designed impact reports, and little gestures of gratitude (such as thank-you presents or certificates). The increase will result in higher-quality engagement materials.
- Run United's 5K Event Promotion (\$25,000): A bigger expenditure is justified by the requirement for digital and traditional media advertising, race day items (banners, shirts), event photography, and public relations. This assures extensive engagement and awareness throughout greater Lafayette.

- Wellness Initiative Marketing (\$12,000): This project will be promoted through digital and print media, co-branded marketing with healthcare providers, and assistance for wellness events. A minor budget increase enables more reach and involvement.
- Community Storytelling Campaign (\$8,000): The money includes professional film production and social media marketing to promote impact tales. This quantity enables for high-quality narrative, which is critical for developing trust and interest.
- Digital Crowdfunding Platform (\$10,000): This includes the development of a crowdfunding platform, connection with social media, and mobile optimization. A greater budget assures a smooth execution, quality design, and successful marketing.
- Local business partnerships (\$20,000): The extra funding allows for co-branded event planning, sponsorship materials, and partnership marketing. This amount represents the expenditure required to improve relationships with business partners and increase community exposure.
- Email marketing automation (\$6,000): This budget is for advanced email marketing tools, segmented email campaigns, and tailored impact reports. A reasonable budget promotes scalability and successful participation from all donor categories.
- Paid media campaigns (\$18,000): The budget includes search engine advertising (SEO/SEM) and paid social media ads (e.g., Google Ads, Facebook/Instagram), particularly for high-impact initiatives like Giving Tuesday. This assures maximum visibility and interaction throughout important fundraising seasons.
- Interactive Web Portal (\$30,000): This budget covers the portal's design and development, which includes graphical data displays, real-time impact reporting, and interaction with the current website. The high expense is justified by the technological complexity and anticipated long-term advantages such as greater donor confidence and volunteer retention.

### **Recommendations:**

**Prioritize digital outreach:** Begin with social media campaigns and the crowdfunding platform to attract younger, tech-savvy donors. These audiences are critical to long-term donor development.

**Improve Volunteer Retention:** Use the Volunteer Appreciation Program to increase volunteer involvement and loyalty. Keeping volunteers is both cost-effective and necessary for continuing initiatives.

**Leverage High-Impact Events:** Emphasize the Run United 5K and Wellness Initiative. These events may bring a large number of people together and collect donations, all while supporting United Way's community-centered goal.

**Expand Corporate Partnerships:** Through the Local Business Collaboration project, new partnerships will be formed to promote sponsorships and co-branded community projects, therefore improving local exposure and trust.

### **References:**

Keller, K.L. (2013). *Strategic Brand Management: Building, Measuring, and Managing Brand Equity*.

Smith, P.R., & Zook, Z. (2019). *Marketing Communications: Integrating Offline and Online with Social Media*.

Kotler, P., & Armstrong, G. (2018). *Principles of Marketing*.

Clow, K.E., & Baack, D. (2018). *Integrated Advertising, Promotion, and Marketing Communications*.

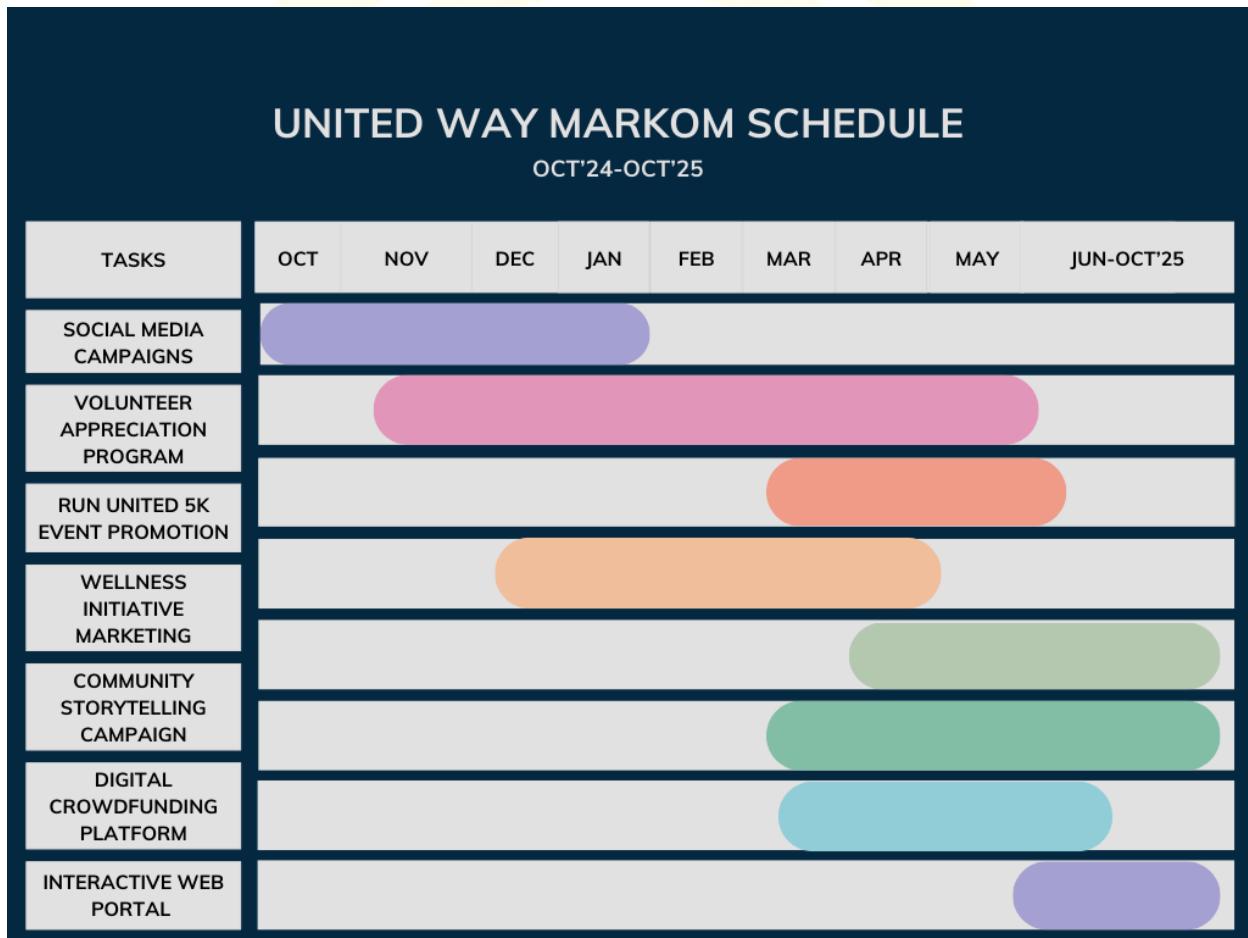
Baltes, L.P. (2015). *Content Marketing – The Fundamental Tool of Digital Marketing. Bulletin of the Transilvania University of Brașov*.

## F.2 MarCom Schedule

### Introduction:

This report outlines a strategic MarCom plan for United Way of Greater Lafayette, focusing on key marketing and communication projects over the next 12 months. The goal is to ensure the timely and effective execution of each project, enhance donor engagement, increase visibility, and manage resources efficiently. The Gantt chart provides a visual timeline of the projects, helping track the progress of multiple overlapping initiatives.

### Framework:



The framework follows a structured approach to managing marketing communication (MarCom) projects using a Gantt chart to visualize project timelines and additional supporting information for execution. The elements of this framework include:

1. Project Names and Timelines: Each project is listed along with its start and end dates.
2. Durations: Horizontal bars on the Gantt chart represent the timeline for each project, highlighting overlap where applicable.
3. Milestones and Key Deliverables: Important checkpoints and outputs for each project are identified, such as launch dates and review points.
4. Dependencies: Dependencies between projects, like the need for the "Product Launch Event" to precede a media campaign, are emphasized.
5. Supporting Information: Additional details such as project descriptions, target audiences, budgets, teams involved, and risks are provided for better management and planning.

### **Analysis:**

The Gantt chart reveals the following insights:

1. **Concurrent Projects:** Several projects run concurrently, such as the "Volunteer Appreciation Program," "Wellness Initiative Marketing," and "Run United 5K Event Promotion." This highlights the importance of resource allocation and team management to ensure these projects do not overlap in terms of workload and focus.
2. **Critical Milestones:** Key milestones, such as the "Platform Launch" for the "Digital Crowdfunding Platform" and the "5K Event Date" for the "Run United 5K Event," are pivotal in the MarCom strategy. These need precise coordination and timely delivery of other dependent tasks.
3. **Resource Allocation:** The analysis of the budget and resources for each project shows a diverse use of both internal and external resources, including partnerships with agencies for social media campaigns and the need for local media collaborations for event promotions.
4. **Project Dependencies:** The "Digital Crowdfunding Platform" has a dependency on the "Community Storytelling Campaign," as content from the storytelling initiative will drive traffic and engagement to the crowdfunding platform.
5. **Risk Management:** Potential risks identified include project delays, especially in content creation, which could affect timelines. For example, any delay in external video production could impact social media campaigns and event promotions.

## **Recommendations:**

**Prioritize Resource Management:** Given the overlapping nature of several projects, it's important to allocate resources carefully, ensuring team members are not overburdened. Use project management tools to track workload and ensure adequate support during high-demand periods.

**Implement Regular Checkpoints:** Establish bi-weekly progress reviews for key projects to ensure that any delays or issues are identified early. For example, set internal review dates for the "Social Media Campaigns" to avoid creative bottlenecks and ensure smooth execution.

**Strengthen Cross-Team Communication:** To handle dependencies effectively, ensure clear communication between teams, particularly for projects like the "Community Storytelling Campaign" and "Digital Crowdfunding Platform." A centralized communication tool can help avoid silos.

**Mitigate External Risks:** For projects that rely on external partners (e.g., video production teams), schedule early drafts and plan buffer periods to avoid delays. Negotiate contracts that allow flexibility for revisions or schedule adjustments.

**Optimize Automation:** The "Email Marketing Automation" project is crucial for ongoing donor engagement. Focus on personalizing messages through segmentation, ensuring higher open rates, and driving consistent donations. Automate reporting to track campaign performance easily.

**Prepare Contingency Plans for Events:** Given the unpredictable nature of live events like the "Run United 5K Event," consider virtual alternatives or backup plans in case of adverse conditions like poor weather or low physical turnout.

## **References:**

1. <https://bootcamp.umass.edu/blog/project-management/best-practices-in-project-management>
2. [https://lafayette.granicus.com/MetaViewer.php?view\\_id=42&clip\\_id=7314&meta\\_id=185455](https://lafayette.granicus.com/MetaViewer.php?view_id=42&clip_id=7314&meta_id=185455)
3. <https://www.feathr.co/resources/blog/digital-marketing-for-nonprofits>
4. <https://channelvmedia.com/blog/create-marketing-communications-plan-template/>