



Utah Parent Center
Special needs, extraordinary potential

Marketing and Development Plan 2014 and 2015 Calendar Years

Updated: 6/13/14

Introduction

The purpose of developing an annual giving plan and marketing plan is to help staff and board set realistic income goals with respect to the annual budgeting process and to continue marketing efforts outside of the Center. The plan also outlines the strategic steps required to reach those goals, as well as board and staff responsibilities in accomplishing the plan.

This proposed annual plan identifies the targeted financial goals necessary to support the financial health of the UPC. The plan will be revised and updated on an as-needed basis in conjunction with revisions to the operating budget.

I. Financial Goals

Projected Fundraising Goal to be reached by 2015 Year End: \$95,000.00

In order to better protect the UPC in the event of a lost funding source, it is the recommendation of the Executive Committee to have a three month cash reserve based upon the current year's projected Budget of \$1,137,164.00. Once a three month protective cushion of \$95,000 has been reached, this plan will be reevaluated with new measureable goals, including what the newly donated money will go to support.

II. Fundraising Strategic Goals (non-monetary goals impacting success of plan)

- A. 100% monetary giving by the UPC board. (75% ? giving was achieved the previous year.) Each board member is expected to be a donor every year. Members can choose when they want to donate during the year.
- B. 100% participation by board in some fundraising task, including cultivation of donors. (100% participation was achieved in the previous year.)
- C. Enhanced communications re: fund development with the board and with prospects, including regular presentations at board meetings by fund development chair or the Development Director.
- D. Development Director will plan for ongoing recruitment / training of fundraising volunteers. Recruit a minimum of ten non-board volunteers to work in fund development.
- E. Develop new prospects for both personal solicitation campaign and direct mail solicitation; cultivate family foundations /trusts.
- F. Strengthen donor cultivation program and board and staff understanding of the purpose and process of cultivation.

- G. To the extent possible, depending upon UPC work load, actively involve UPC staff in special events and fundraising activities.
- H. Maintain systems for ongoing monitoring / evaluation of progress in all areas of fund development.

III. Fundraising Solicitation Strategies

Add Personal notes to event invitations and direct mail appeals.

A. Personal Solicitation Campaign

Board Members are expected to give an annual monetary gift to the UPC and are asked to make UPC a priority in their personal giving. Board members are expected to be involved in fundraising by using their personal and business connections when appropriate, by soliciting funds when appropriate, by serving on fundraising committees, and by attending fundraising events.

We ask that each board member be responsible for raising (or giving) a self- determined dollar amount annually. We also ask that each board member make a personal contribution, which will be counted as part of this annual amount. Giving one’s time and expertise, as important as they are, are not substitutes for providing financial support according to one’s capacity. If board members don’t support their own organization, why should anyone else?

- 1. Board Solicitation (Chair: Chair and Chair Elect)
 - Time Frame: Dec. 2013 – Mar. 2014
 - # of Prospects: 100%
 - Goal: 100% Giving

B. Individual Solicitation

- # of Prospects: 30 top individual donors and family trusts / foundations
- Time Frame: Jan. 2014 – December 2014
- Goal: 60% renewals, 15% gift upgrades

Method: Personal solicitation by board and non-board volunteers (one-time annual giving in lieu of multiple solicitations.)

C. Website

- 1. Add a “BUY” page – buy one training for a family, an IEP Coach training, etc
 - Chair: Administrative Assistant
 - Time Frame: December 2013

D. Corporate Grants

- 1. Search out and apply for corporate grants and partnerships

- a. Mountain America
- b. U.S. Bank
- c. Goldman Sachs

E. Legacy Funding

- 1. Search out and apply for legacy funding
 - a. Eccles Foundation
 - b. Simmons Foundation
- 2. Identify possible relationships with Attorneys in order to be included in wills and trusts.

F. Mailing to major businesses in the state requesting we be added to their corporate giving and matching campaigns.

- 1. United Way
- 2. State Employees

G. Direct Mail

Each direct mail will have a different theme to encourage multiple gifts and to reach individuals with varied interest. Direct mail is the responsibility of the Fundraising / Marketing Committee, Development Director, and / or UPC Administrative Assistants.

- 1. Letter to previous payroll deduction donors to encourage renewal and to suggest increasing personal donation. (Is this possible – due to privacy restrictions?)

Time Frame: August – September 2014 and 2015
 # of Prospects: ?
 Method: Mailings
 Goal: 75% renewal, 15% upgraded gifts, \$? amount

- 2. Annual Ask – UPC Birthday Celebration

Time Frame: August
 # of New Prospects ?
 Method: Direct Mailing and eBlast
 Goal: \$5,000 net

- 3. End of Year Ask – Last minute tax deduction

Time Frame: November 2014 and 2015
 # of New Prospects ?
 Goal: %75 renewal, 15% upgraded gifts, \$? amount

IV. UPC Fundraising Events

- A. Luv 2 Dance Benefit Showcase (Chair: Jennie Dopp)

Time Frame: January 2014

Attendance Goal: 500
Goal: \$10,000 net

B. Great Clips Fundraiser

Time Frame: One Month during 2014
Goal: \$2,500 net
Chair: Jennie Dopp

Method: Trent Hutchinson, owner of 12 Utah Great Clips would like to sponsor the UPC during one month of the year. \$2.00 from every haircut during the month will be given to the UPC.

C. 2014 Love UT, Give UT (Chair: Fund/Market Committee and Development Director)

Time Frame: January 2014 – March 2014
Goal: \$3,000 net (2013 campaign produced \$1,500?)

Method: eblasts, social media, newsletters, list serve solicitation. Board and staff make personal contacts through social media and personal interactions to raise awareness and solicit donations.

D. Educator Event Gala (Chair: Fundraising / Marketing Committee and Development Dir.)

Time Frame: June 2014
Goal: \$5,000+

Method: Hold an event similar to the 2013 Marriott Breakfast Event. However, this event would target educators and all teachers and Special Education Professionals. (or lawyers, doctors, etc. Event would be scripted for a specific audience.)

E. Launch AmazonSmiles

F. Get Air Utah Parent Center Event (Chair: Fund / Marketing Committee and Dev. Dir.)

Time Frame: July 2014
Attendance Goal: 300
Goal: \$1,500

Method: solicitation. UPC keeps \$5.00 of every \$10.00 admission. We can charge more or less than \$10. Get Air keeps \$5.00 of admission, we keep everything else.

G. Analyze the feasibility of hosting a race or golf tournament.

September 2014

H. Cultivation Strategies (Making “Friends”)

The purpose of cultivation is:

1. To add prospects to our donor base and develop them to become active supporters and regular donors; and

2. To improve relationships with current board members, donors, volunteers, and other friends of UPC, to build a greater understanding of how they can help our Center achieve its mission.

Donor and volunteer recognition are critical to the cultivation process. Cultivation needs to be discussed regularly at board meetings to encourage each board member to become part of the cultivation process.

A. 48 Hour Thanking Rule

1. All thank you efforts should take place within 48 hours of event.
2. Tell them "Thank You", and where their funds will be used.
3. Make thank you calls. People will make a donation from a thank you call.
4. Thank you phone calls should be followed up with a note.
5. A donation greater than \$250 will require an IRS letter.
6. Yearly donors should be thanked annually. Monthly donors should be thanked on the first month they donate.
7. Take BIG thank you cards to corporations.
8. Acknowledge donors in newsletters
9. Send cards with family stories and accomplishments of the Center.
10. Send donors photos, quotes, or success stories.
11. Take a donor to lunch to share success and measureable gifts.
12. Arrange for a donor to be featured in the newsletter. With permission, interview and write an article about the donor.
13. Host a reception for the top 30 donors.
14. Recognize the anniversary of a donor's gift with a card or small gift.
15. Schedule "advice reception / advice coffee talks" to ask donors what they think about the organization and our work.

- B. Complete a Donor Survey. Have donors identify how often they want to be "asked" and how they prefer to receive solicitations.

Time Frame: February 2015

- C. Visits: When possible, board Chair or a member of the board should accompany the Executive Director on visits to potential donors.

- D. Establish and frequently review a list of potential donors. List could be made up of individuals, corporate and foundation contacts. Send prospects a blog link featuring the organization, a newsletter, or a family story. Or, plan and host a "Meet our Organization" tour. Utilize the PIX date base for organization.

- E. Open Houses:

This is a responsibility of the Board and Staff.

Time: Twice per year: September: Donor Recognition
April: Volunteer Recognition

Goal: Appreciation evenings at the UPC for donors and volunteers; opportunity to see facilities, meet staff, recruitment of potential volunteers, and cultivation of potential donors.

Method: Special mailings with invitations, newsletter articles, public announcements, and personal invitations by board.

Responsible: Board, Staff, and perhaps Volunteers

F. Communications

1. Holiday Card: Holiday card to 300 friends and major donors (not a solicitation). Utilize board members to write some personalized messages.
2. Newsletters: 6x per year. Sent to UPC mailing list provides regular updates on agency programs, activities, and special events. Mailing list includes funders, donors, volunteers, elected officials, and other agency executives and service providers.
3. Annual Report: Annually to coincide with Fiscal Year. Mail in September. This is a major communications tool sent to government and private funding sources, large donors, agency executives, and public officials, and is submitted with most proposals and requests to large donor prospects.
4. Family Stories: Another major communications tool featuring testimonials and family stories. Distribute in association with other collateral.
5. Other Publicity / Public Relations: See Marketing Section

I. Marketing Strategic Goals

- A. Technology Committee will analyze and evaluate current UPC social media platforms to identify opportunities for development. UPC goals are: to develop an on-line community, potentially recruit a social media guru, and create accountabilities for digital spaces. Ex: Is UPC on Google + ?
(See Strategic Plan I.3.1, I.3.2, and I.3.3)

Technology committee will report back their findings and recommendations.

Chair: Technology Committee

Time Frame: December 2013 – January 2014

- B. Look into the possibility of District Parent Consultant Face Book Pages with streamlined information for each district.
- C. Create Media Partnerships and utilize local media outlets.

1. FM100 Campaign – Sunday morning, Sounds of Sunday has a high listener pool. \$1500?
 2. Continue to reach out to local media outlets in TV and Radio
 3. Standard Examiner and other newspapers
 - a. \$200 per ad
 4. Utah Family Magazine
 - a. ½ page ad, 2 issues / year for \$1,000. Feb/Mar Special Needs Issue. Dec/Jan Education issue. It is print and online
 5. COMCAST Newsmakers
 - b. 4.5 minute interview taped Wed. 11/20/13. It will air in December on CNN Headline News and Comcast On-Demand.
- D. Integrate PIX into UPC Fundraising Efforts in order to track and organize donors.
 Chair: Technology Committee & Administrative Assistants
 Time Frame: March 2014
- E. Obtain a QR code and incorporate code into collateral
 Chair: Technology Committee & Administrative Assistants
 Time Frame: February 2014
- F. Establish a blog for UPC Story Telling
 Chair: Jennie Dopp, Technology Committee and Administrative Assistants
 Time Frame: January 2014
- G. Design and obtain a magnetic fridge piece to be distributed at trainings, workshops, and conferences.
 Chair: Fundraising / Marketing Committee Member
 Time Frame: May 2014
- H. Create a compelling script and give to potential donors after workshops and phone calls. Follow up with a picture and card. “If this has been helpful, please us help another family.”
 Chair: Fundraising / Marketing Committee and Administrative Assistants
 Time Frame: January 2014
- I. Identify ways to connect with the Spanish Population
1. Facebook page in Spanish

Chair: Administrative Assistants
 Time Frame: January 2014
 2. Spanish TV & Radio

J. Monitoring the Fund Development / Marketing Plan and Process

- A. The Fundraising / Marketing Committee will meet 6 times a year to review the progress of the plan and, with development staff, will identify problems and solutions.
- B. Development staff and Committee Chair will discuss development issues on a regular basis.
- C. Committee chair and development staff will monitor sub-committee chairs; committee chair will follow-up regarding problems.
- D. Fundraising / Marketing Committee will discuss fund development plan and progress at board meetings.
- E. Development staff will provide financial and statistical data with which to help evaluate progress of the plan.

K. Fund Development Calendar for 2014 and 2015.

December 2013	Solicit Board Donations Free Birds Meal Donations Holiday Cards Add donation information in a sub menu under the Donate button. "Click to support a program, pay for a training, etc." Technology Committee will give social media recommendations
January 2014	Luv 2 Dance Benefit Showcase Great Clips Fundraiser Individual Solicitation – Top 30 Donors Plan Love UT, Give UT Campaign Script and Follow Up Ask for Workshops and Trainings Integrate PIX into UPC standard practices and routines Develop UPC Blog Spanish Facebook
February 2014	Obtain a QR code and incorporate code into collateral. Launch blog for UPC Story Telling Work on Corporate Grants and Legacy Funding
March 2014	100% Compliance for Board and Staff Donations Execute Love UT, Give UT Campaign Mailing to Corporations and Matching Campaigns
April 2014	Host Volunteer Open House Evaluate Love UT, Give UT Campaign
May 2014	Roll out Magnetic Fridge Piece

June 2014	Educator Event Gala
July 2014	Preparation of Annual Report Get Air Event Evaluate Event Gala
August 2014	Annual report mailed with cover letter. UPC Birthday Ask Letter Plan PR for Employee Campaigns Plan Donor Open House
September 2014	Mailing for Employee Campaigns Mailing of Annual Report Host Donor Open House Evaluate feasibility of race or golf tournament
November 2014	Solicit Board Donations Year End Appeal
December 2014	Holiday Cards Review and update 2015 Fundraising / Marketing Plan
January 2015	Plan 2015 Love UT, Give UT Campaign
February 2015	Complete Donor Survey
March 2015	100% Compliance for Board and Staff Donations Plan Volunteer Open House Execute 2015 Love UT, Give UT Campaign
April 2015	Host Volunteer Open House Evaluate 2015 Love UT, Give UT Campaign
July 2015	Preparation of Annual Report
August 2015	UPC Birthday Ask Letter Annual report mailed with cover letter. Plan PR for Employee Campaigns Plan Donor Open House
September 2015	Mailing for Employee Campaigns Mailing of Annual Report

Host Donor Open House
Write 2016 Fundraising / Marketing Plan

November 2015
Year End Appeal
Solicit Board Donations

December 2015
Holiday Cards
Board Approve 2016 Fundraising Plan