

ABM Anglican Board of Mission - Australia **Working for Love, Hope & Justice**

2016 Marketing Project

CONTENTS

Cover Letter	page 2
Executive Summary	page 3
Introduction	page 5
Audit	page 6
SWOT	page 9
Stakeholder Analysis	page 11
Donor Marketing Tactics Review	page 14
Evaluation of Support Base Growth	page 18
Positioning Summary	page 22
Key Message Analysis	page 30
Conclusion	page 32
Timeline & Recommendation Summary	page 33
Appendix	page 35

Note: Recommendations detailed in relevant sections and Appendix table.

Cover Letter from the Marketing Working Group

The Process of the Draft Review

The enclosed report details findings and recommendations for ABM's marketing and fundraising portfolio.

The Marketing Working Group endorses this work and takes this opportunity to outline the chronology of events that led to this project.

- In late 2015 the Communication team proposed to the Board a reintroduction of the current ABM logo with a slightly softer red following supporter comments.
- The Board requested a broader review of ABM's marketing take place
- This enclosed report details the findings and recommendations relating to this review of ABM's marketing.
- This research and documentation is designed to be considered and endorsed in part or in full by the board. Following this and based on the findings, a strategic marketing action plan should be developed, including budget and resourcing requirements, for implementation by ABM's Communication team and the Marketing Working Group.

We trust the Board members find this research and report as useful as we have and look forward to supporting the communication team to implement the next stages of this work.

The Marketing Working Group would also like to commend Elizabeth Baker for her diligence and hard work in planning, preparing, and presenting this document to various groups at ABM. Her flexibility and understanding has been greatly appreciated.

Sincerely

Mr Brett Collins, National Order Fulfilment Manager, Perfection Fresh Australia

The Venerable Jan Crombie, Archdeacon, Parish Partnerships, Diocese of Melbourne

The Very Rev'd John Roundhill, Vicar General and Dean of St Paul's Cathedral, Diocese Bendigo

Mrs Debra Saffrey-Collins, General Manager for Chaplaincy and Diocesan Partnerships, Brotherhood of St Lawrence

EXECUTIVE SUMMARY

Since January 2016 work has been undertaken to develop a detailed understanding of ABM's current marketing and fundraising tactics, to analyse the supporter audience and its potential for growth or decline, as well as review the programs and brand of ABM to determine general marketability.

Outputs produced and enclosed as part of this report include the following:

- Audit of ABM's marketing performance in the last decade
- SWOT analysis
- Stakeholder analysis
- Donor marketing tactic review
- Evaluation of support base growth
- Positioning summary
- Key message analysis

Research has included interviews and meetings with key stakeholders such as communication and programs staff, the Marketing Working Group and board members. Data analysis has been performed through Raiser's Edge fundraising database as well as qualitative research and analysis of current and historical marketing documentation. Five surveys were also conducted, covering internal stakeholders, supporters and an external audience.

Key findings and recommendations can be summarised into the following sections:

- **Stakeholder Engagement**

ABM's groups and committees are complex but recommendations are offered to ensure these stakeholders continue to effectively market ABM's work. Key opportunities include the development of simple and effective resources and further investment and administration of the Speaker program. These have the potential to be implemented in a prompt manner.

- **Fundraising and Growth Opportunities**

Detailed in the Donor Marketing Tactic Review and Evaluation of Growth sections of this report are many recommendations for both the development of existing and implementation of new marketing and fundraising tools. It has been found that growth from within the existing supporter base, as well as acquiring new donors from within the broader Anglican Church, are possibilities in the short term. Acquisition from Emergency Appeals and investment in bequests and regular giving are key opportunities.

- **Communication Tools, Branding and Program Repositioning**

There are detailed recommendations outlined as part of the Positioning Summary. A main focus of this is providing additional value or incentive to ABM's supporters, existing and new, by offering further ministry and mission resources. It is also important that decisions be made around ABM's logo refresh. It is recommended that this is proceeded with, based on positive feedback from internal and external audiences. Communication with supporters is also central to recommendations in this section. Consistent key messages are required but tailored project communication, through a variety of media will enhance the engagement of ABM's supporters.

The timeline at the end of this report presents a phased approach to the recommendations detailed throughout. It must be noted, there are a significant number of recommendations offered, both large and small in scale. This has been done to present ABM with a full picture of the opportunities available in the marketing and fundraising portfolio and to ensure this is a genuine overview of ABM's marketing opportunities. These recommendations, and the phased timeline, are designed to feed into the pending Strategic Marketing Plan that will offer more detailed actions and act as a working document based on ABM's chosen priorities.

A Note: How to engage with this report

This report is a culmination of the various outputs delivered throughout the project plan timeline. Recommendations are therefore grouped in the relevant sections to ensure this document is an effective tool for ABM to implement changes to ensure growth and development in its marketing and fundraising tactics.

It is acknowledged that the recommendations throughout this report are plentiful and, despite their interconnection, may appear disparate. Therefore, to assist with the execution of the recommendations and ensure this report is used as a working document, a timeline that offers a phased approach to the implementation of the recommendations is included on page 33, following the conclusion.

The reader will find a summary of recommendations by reading the overview in the timeline or, if preferred, by reading greater detail in the relevant sections. There is also a recommendation summary table in Appendix E.

INTRODUCTION

Situation Analysis

It is timely to consider ABM's marketing strategy, evaluate existing marketing tools and consider new audiences and tactics that may benefit the organisation in sharing its good news and generating supporters and income.

ABM has identified that in the last decade it has not specifically reviewed its marketing strategy or the way in which it communicates and promotes itself and its work with its target audiences.

Despite having a highly engaged supporter base, ABM is aware that its traditional donor base and constituents are in decline and consequently, fundraising income may decrease in the coming years.

Government income for ABM's development work is also likely to reduce, perhaps substantially, in the near future and will no longer offer some cushioning for the reduction in fundraising income.

However, ABM's income for emergency relief work has continued to grow and ABM has made enquiries to gain Public Benevolent Institution status. This may provide opportunities to expand emergency relief efforts to include developed countries and domestic emergencies within its emergency relief fundraising and to improve fundraising for Aboriginal and Torres Strait Islander Programs.

With consideration of these external factors and the aim to reset ABM's marketing strategy, this marketing project seeks to achieve the objectives below, with the next step being to develop a strategic marketing plan for ABM to consider.

The original Terms of Reference for this marketing project can be consulted for further background. Government Fundraising has not been included in this review as it does not fall directly into the remit of the Marketing and Fundraising portfolio.

Objectives

- 1) Review and analyse ABM's marketing performance over the last ten years.
- 2) Review the current marketing activities to determine strengths, weaknesses, opportunities and threats.
- 3) Review ABM's current stakeholders and audiences, including its existing support base and its potential for growth or decline over the next five years.
- 4) Review the existing programs ABM offers to determine their marketability.
- 5) Review the marketability of ABM's brand and the effectiveness of the related messaging with its existing stakeholders and support base and its potential for attracting new supporters.

AUDIT

This audit is part of the initial research that will feed into the broader marketing project plan for ABM. This section identifies the major marketing tactics used over the last decade and specifically notes the introduction of any new tactics during the period.

Data has been collected from Raiser's Edge fundraising database to find the correlation between the introduction of new tactics to new donors and fundraising growth. However, this data analysis is limited as it is based on the metrics collected in previous years and consequently doesn't have a consistent comparison point.

The information below has been collected from interviews, a review of ABM's previous marketing plans and associated literature as well as data analysis.

Timeline

The following lists the key marketing tactics and identifies any new tactics or points of interest over the last decade. Please note; this is limited to the review of marketing plans on file and current ABM staff knowledge.

2006- A fundraising appraisal was conducted by an external consultant. It is not clear what action was taken. However, around this time a marketing plan was also produced by Communications and Management.

2007- Partners magazine became published three times a year instead of quarterly

2008- Website redeveloped

2009- New Marketing & Fundraising Manager appointed (Melany Markham)

On a Mission email commenced as a bi-monthly email to supporters

Partners magazine became published twice a year instead of three times annually

Prayer Diary was established in a new format

Icon logo use discontinued

2010- A strategy was prepared addressing ABM's supporters and how marketing and fundraising tactics could be used to further engage these supporters. Again, it is unclear on any action taken .

ABM joined Facebook

The Project Book became an annual fundraising tool (not released at financial year)

The Indigenous Campaign, usually held in July was dropped

Fundraising in schools, with the Schools Challenge, was initiated

2011- New Marketing & Fundraising Manager appointed (Christopher Brooks)

2012- On a Mission became a monthly email

ABM joined Twitter

Instead of two separate appeals, the Christmas Appeal became a part of the Advent Appeal

2013- The Lent and Good Friday Appeal became the Lent Appeal and a separate Good Friday and Easter Appeal

Schools fundraising was initiated again, but continues to struggle

2014- New website launched

2015- The most significant media coverage in many years, with the launch of the Vanuatu Emergency Appeal

Christmas e-card commenced

It should be noted that ABM Speaker engagements and the Project Book have been done consistently over the years.

Data Analysis

This audit aims to assess if there was any correlation between marketing tactics and new donors. Appendix A summarises the number of new donors each year. When compared to the above timeline, there appears to be no correlation between the marketing tactics and the numbers of donors.

However, through the analysis of data it was discovered that the number of new donors increases based on Emergency Appeal income. Although certainly not consistent, with the outlier year of 2009-2010, the data in Appendix A shows the relationship in recent years between the higher number of new donors and the higher amounts of donations in Emergency Appeals.

Summary of Audit

This audit has illustrated some key learnings about ABM's donors and marketing tactics. The fact that donor numbers haven't fluctuated based on marketing tactics could highlight a loyal supporter base but also suggests the marketing tactics used have been safe and haven't driven non-financial supporters to become donors.

It should also be highlighted that the longevity of some of the tactics has proven successful among ABM's stakeholders. For example, the Project Book and Prayer Diary.

However, there are also tactics that have been tried a number of times and are still yielding limited results such as fundraising in schools.

The changes in appeals, removing appeals or combining some, has proved useful as income has remained relatively consistent (ignoring donor attrition). There is potential to further review appeals to ensure resources are being used effectively as well as target campaigns to more specific or niche groups of stakeholders, both of which will avoid donor fatigue.

The timeline notes two website redevelopments as well as the launch of ABM's Facebook and Twitter accounts but other online tactics are limited. In the future, the redevelopment of existing or

implementation of new online tactics may increase supporters in a younger demographic and see further growth in new donor numbers. There is also potential in acquiring new supporters through ABM's Emergency Appeals.

Of interest is that whilst speaker engagements have been a long standing tool used to raise awareness of ABM's work, limited data is recorded to track donations following speaker engagements and tracking such information could prove useful in improving this marketing tactic in the future.

In summary, ABM's marketing performance over the last decade has been conventional. Standard and reliable marketing tactics have been used to communicate with ABM's supporters which have yielded good, but expected, results. Some of the tools used are most successful but others tired. The audit has highlighted ABM is cautious with risk taking in marketing and fundraising tools which is appropriate given its stakeholders and supporters but something to consider given the macro environment influencers of a declining donor base.

SWOT

This SWOT is part of the initial research that will feed into the broader marketing project plan for ABM. The SWOT identifies the strengths and weaknesses (internal) and the opportunities and threats (external) specific to ABM's marketing – the messages, audiences, tactics and more. Naturally, some of the points relate to ABM as a wider organisation.

The information has been collected through research and observation as well as consultation with the communication team and key internal stakeholders. Significant findings from the supporter survey are also included.

Strengths

- Loyal and engaged supporter base
- A powerful database tool to segment audience and communicate effectively
- The official national mission agency of the Anglican Church of Australia
- Strong partnerships and relationships – both of the communication team and ABM as a whole
- Quality of work and attention to detail is high
- The missiology and ethos of ABM (the focus on partners not missionaries) is a strength-based aspect and the choice of ethical projects allows for positive stories to be communicated
- Appeals and publications are consistent and reliable, they are on schedule and donors know what to expect
- Resources produced are well received eg: Lent Resources
- ABM communicates effectively to the traditional ABM demographics of supporters ie: through parishes
- A trusted cause
- The variety and amount of work achieved in a small team

Weaknesses

- A variety of messages exist which can compete with each other or confuse an audience – Church to Church vs Community Development vs Reconciliation and the number of overall projects
- Database under-utilised as some data is missing eg: individual donors from parishes aren't captured or details like ages are not included
- An ageing support base
- A supporter base with an historic understanding of ABM, rather than an understanding of the organisation's current missiology
- Segmented fundraising strategies such as lapsed donor or new donor strategies are under developed and resources to target new donors to grow the database are limited
- The absence of a robust bequest or "In Memory" program

- Getting current and quality information and photos from partners to assist with effective emotional story-telling
- The flexibility required to react to changing priorities in the organisation can create a lack of direction within the communication team
- Research and Development – resources and processes don't allow the testing or review and analysis of marketing
- Like all not-for-profits, limited resources (time, people and money) restrict the amount of activities achieved by a small team as the diversity and quantity of tasks required is large
- The brand is slightly dated which can limit the appeal to a younger demographic. This is not just the logo, although the logo does define the identity of the organisation. Consequently, the look and feel of ABM's collateral and promotions could be refreshed to provide rejuvenation of the brand
- Some marketing tactics have been used for long periods which can cause donor fatigue

Opportunities

- Engaging with a younger demographic through Anglican schools
- Social Media platforms can be further developed to communicate with new audiences and can also be responsive to external factors in a timely manner
- ABM securing PBI status to broaden fundraising opportunities
- Disasters and the launch of Emergency Appeals bringing new donors to ABM
- Use of the wider church network to support ABM to produce more prayer, ministry and mission resources to accompany with campaigns
- Partnerships with other like-minded agencies allow the sharing of resources to engage with new audiences. The Education team currently conducts some successful partnership events.

Threats

- The declining demographic of ABM's traditional supporter base
- Reduction in government funding
- Competitors including other Anglican agencies, other church based agencies as well as other charities or causes within the parish. The main Anglican Agencies defined as competitors are – Anglican Overseas Aid, Anglican Aid (Sydney), Anglican Aid Abroad (QLD), Anglican Relief and Development Fund.
- Confusion in the marketplace – anecdotally, it is common that Anglicans think ABM is Anglicare
- Pull factors from the external church extend to ABM's management and flow through to the communication team which contributes to the limited resources

STAKEHOLDER ANALYSIS

ABM has a complex variety of stakeholders and audiences with which to communicate. As part of the review of ABM's marketing, a summary of key internal stakeholders is provided below and recommendations as to how the groups and committees can be used to further effectively promote ABM's work are offered.

This analysis is a small part of the research conducted as part of the project plan and will feed the broader recommendations to the draft strategic marketing plan. The research conducted includes interviews and a survey with stakeholders.

Groups

Board

Board members are not directly involved in the daily proceedings of ABM marketing. However, the members themselves serve as a key tool to share the work of ABM whilst in their other roles in the wider Anglican Church. Those who completed the survey indicated they are provided with the necessary resources to promote ABM.

Staff

As with board members, staff members can be used as marketers for ABM. Staff indicated they had the information required to market ABM, particularly the Project Book and the website.

Committees

ABM relies on the hard work and dedication of volunteer representatives in each diocese. These people have a passion for the mission of ABM but each diocese has different needs and each is served by an ABM representative in different ways. Some are sole representatives that have to cover a geographically large area, and some are chairs of a committee with a team of volunteer helpers to support them. The diversity in these committees and Diocesan Representatives makes it complicated to communicate with them in a streamlined manner. However, most in this group of stakeholders indicated they feel resourced appropriately to promote the work of ABM. The diversity also presents challenges for ABM to be aware of exact happenings in each diocese, such as fundraising events and speaking engagements, if the committees don't report back to ABM in detail.

Auxiliary

The ABM Auxiliary began in 1910 and today it prays for, promotes and supports the work of ABM. Membership of the Auxiliary is open to all members of the Anglican Church. Each year the Auxiliary selects a project to be the focus of prayer and fundraising and over the years the Auxiliary has raised over one million dollars. Those of the Auxiliary Executive surveyed indicated the marketing resources provided were of a professional nature and met their needs.

Associates

ABM Associates are supporters who choose to pay a \$30 annual fee as an expression of commitment to ABM. Associates of ABM have an opportunity to participate in the running of the organisation as they elect a member of ABM's Board and a member to each of ABM's Committees (Church to Church and Community Development). These Associate members are elected for a term of three years and each year a meeting of Associates is called with the Board reporting to the group.

Friends

This is a new group of ABM supporters established in the Dioceses of Perth and Tasmania. Friends of ABM are usually a younger demographic of supporters who have a passion for social justice and advocacy. One Diocese has appointed a Youth Ambassador through this group but at this stage, the nature and role of the groups continue to be in development.

Supporters

Supporters include ABM's financial donors as well as those who support the organisation in other ways. Please see a detailed analysis of supporters in the review of Donor Marketing Tactic Review.

Recommendations

The below recommendations are offered to achieve part of Objective 3, to suggest how ABM's groups and committees might further effectively market ABM's work.

1) Committee Structure

Whilst the committee structure could certainly be streamlined to improve efficiencies, it is recognised this is almost impossible for management to do given the voluntary nature of the committees and the history behind each diocese's establishment of its group. Therefore, it is recommended the committees continue to receive communication as is currently the practice and consequently, they will continue to be used as engaged, useful local resources.

2) Info-graphic Resource

It has been identified that some stakeholders would benefit from a new resource that clearly but simply highlights the work of ABM or explains the complex nature of some of ABM's work. It is recommended that an info-graphic be developed. (See example in Appendix B). This tool will simplify ABM's complex messages and may also appeal to a younger audience. It could be shared electronically and as a hard copy flyer.

3) Diocesan Representatives Conference

It is evident that the Diocesan Representatives Conference is a key tool to communicate with the representatives and is highly valued by this audience. It is recommended that this conference continue to be used as a significant marketing tactic and as part of the conference, representatives be further resourced with tools they can take back to their dioceses. Eg: posters, videos on usb and the new info-graphic. Some representatives also indicated they would find general marketing education useful such as speaking tools (see Recommendation 4) or social media education and such teaching could be a part of the conference.

4) Speaker Program Administration Review

Many of ABM's stakeholders may be used as, or interact with, ABM speakers. Feedback from different audiences indicated they would like more ABM speakers or, that as an ABM speaker they would like more training and presentations made available. While there are many challenges in sourcing quality speakers and tracking speakers, it is recommended that the Speaker Program administration be reviewed by the Communication team and tools such as speaking presentations, training, feedback and donation tracking be further developed. This may

not require new resources but simply existing tools being presented to potential speakers in a different format as a training package. This may encourage new speakers as well as motivate existing ones.

5) ABM Auxiliary

The Auxiliary is a reasonably effective fundraising group. Feedback indicated that the Project Kit for the Auxiliary project is well presented and useful so it is therefore recommended that these tools be continued.

6) ABM's Associates' Welcome Pack

ABM's Associates pay a fee as an "expression of commitment to ABM". It is recommended that as part of this commitment, the Associates be encouraged to market ABM further in their own circles. Associates should receive a welcome pack (electronic or hard copy) upon payment of their fee which could include resources to both inform them and be shared with others. As with the above speaker tools, these may simply be existing resources like videos, flyers and the new info-graphic that can be packaged as an Associate Welcome Pack.

Please also see the detailed recommendations for growing supporters and financial donations in the Donor Marketing Tactic Review.

DONOR MARKETING TACTIC REVIEW

As part of the review of ABM's current stakeholders and audiences, the existing marketing tactics used to nurture new, existing and lapsed donors have been analysed to feed recommendations that ABM can implement to see growth from within its existing support base.

Below is an outline of the existing tactics used and a traffic light system is displayed to highlight what's working effectively (green), what could be improved (orange) and what needs review (red). Recommendations of new tactics to further enhance donor relations will be detailed in the final strategic marketing plan but to ensure a cohesive and practical document, brief suggestions for enhancement are noted in this section where appropriate. Logistical implementation is not detailed.

The evaluation of support base growth and recommendations follow this review.

New Donors

- O Welcome letter / first receipt – new donors receive a welcome letter as part of their first receipt. This is a useful tool and should be further enhanced by developing an official Welcome Pack with a receipt, welcome letter, prayer diary and the latest edition of Partners. This will not affect the general new donor communication (noted below) as only past editions will be provided.
- R Next Donation Request – ABM doesn't currently automatically offer a second donation request to donors in a specific timeframe. Whilst research shows this is a most effective fundraising tactic the ABM ethos and donor profile should be taken into account. Therefore, the donor relationship could be nurtured via a letter or email that shares a story or video and an extra thank you, with a soft ask included. This tool has been trialled following some emergency appeals and could be implemented in a more strategic approach.
- G General New Donor Communication – new supporters receive specific mailings, appeals and e-newsletters depending on the details known (ie: email or postal address) and their mailing preferences. This is currently managed well through Raiser's Edge.

Lapsed Donors

- R Lapsed Donor Letter – this tool is not currently utilised. ABM should determine a timeframe (eg: 12 months) and implement a letter/email that is sent to donors who have previously given but not donated in the last period. The communication reminds donors to give if they have forgotten and also allows ABM to be more effective with communication if the donor wishes to be removed from future mailings etc. Phone calls are another effective tool to reactivate lapsed donors.

Active Donors

- G** Updates on projects to parishes pledging donations through the Project Book – the Communication team sends project updates to parishes that have pledged donations to specific projects through the Project Book. This is an excellent tool that helps connect the donor to the cause and builds a relationship with ABM and its projects.
- O** Updates on projects to donors retrospectively – it has proven more difficult to update parish and individual donors about the projects to which they have given when they are not pledged through the Project Book system. From an administrative perspective this is a challenge but not impossible. The effective use of Raiser’s Edge to track the projects, combined with changes that are underway to ensure the website has project updates on pages with friendly URLs may assist so that emails can be sent to donors, offering updates online. A master project letter with variable fields could also be set up in Raiser’s Edge to assist with these targeted project updates. In the Supporter Survey, 47% of respondents indicated they would like to receive more news.
- R** Regular Giving – a Regular Giving program does not exist at ABM and is an area for potential growth. In the Support Survey 24% of respondents said “yes” they would consider giving to a regular giving program and a further 17% indicated “maybe”. This highlights potential for growth from within existing ABM supporters. Such a strategy also has potential to connect with a younger Anglican demographic that may prefer an easy, regular donation option.

Major Donors

- O** Classification – ABM classes major donors as those who donate over \$3000 in one donation. It is suggested that this be extended to include anyone who has given over \$3000 in a year. Parishes or organisations are classed as major donors if they give over \$10,000. There are 104 major donor individuals and a further 50 major donor organisations.
- O** Acknowledgement – major donors currently receive special acknowledgement in the form of a different letter signed by the Executive Director. To further acknowledge significant donations, ABM can consider the Executive Director or a management team member hand signing or adding a personalised hand written note to donations, where appropriate as well as having the Executive Director or a board member call major donors to thank them personally.
- R** Fostering Relationships – to further build relationships with ABM’s major donors they could be invited to all ABM events in their region. The Project Book could be sent to all individual major donors (at present, it is sent to those who have requested it).
- R** Philanthropic Giving – ABM may be able to tap into the giving of major and philanthropic trusts, although it should be noted that many will not give to religious organisations. Further research should be undertaken as to the likely success, as this work takes significant time and requires a dedicated resource. If ABM receives PBI status this may assist with this development.

Bequests

- O** Developing Bequestors – the bequest program has been in development for some time. A booklet which can be sent to potential givers has now been signed off. The 12 page booklet contains

information on ABM and its projects, how bequest money will be utilised and provides information for Will inclusion. This booklet should be sent to all major donors and any new enquirers or those who have shown an interest in leaving a bequest. It is also useful to circulate through key supporting parishes.

- O** Nurturing Bequestors – a system has been developed by the Communication team that will allow follow-ups to be sent to ‘planned’ givers and ‘confirmed’ givers will be nurtured. The ‘confirmed’ givers will receive VIP invitations to local ABM events in their area and have the option to be included on the ABM website honour page.
- O** Bequest Strategy – investment in bequests requires a strategic approach to ensure the appropriate resources are allocated to this work. The development and nurturing of bequest prospects, noted above, should include a number of communication and marketing tactics such as: follow up calls, visits, event invitations, tailored communication messages and others, all of which should be implemented in a strategic approach and timeline.

Online

- O** Online Donations – ABM’s website donation page is simple but constrained by the technology platform, Net Community. The online donations could be enhanced by the use of images and a thank you video (a specific video thanking donors following their gift). Recent research by the Church Agency Network has other useful suggestions the Communication team is already implementing to enhance online donations.

Appeals

- G** Emergency Appeals – ABM’s fundraising success with Emergency Appeals sees a correlation between mainstream media coverage and fundraising income. For example, the Vanuatu appeal had good secular press coverage and ABM chose to email parishes and bishops directly. Emergency Appeals have proven to be an excellent way to attract new donors. For example, there were 245 new donors acquired during the 2015 Vanuatu Emergency Appeal. The average gift of this appeal was \$321 and of the 245 new donors, 63 gave a second gift within the following 12 months. If ABM receives PBI status, as is being applied for, this may be useful in further developing Emergency Appeals at a local level.
- R** Number of appeals and cost ratio – ABM runs ten appeals each year, which is a large number for a small not for profit. (See Appendix C for the list of appeals.) It may be more viable to reduce the number of appeals by combining some or removing some as some costs of appeals are over 50% of the fundraising. If the number of appeals is reduced, resources could be used to further enhance key appeals like Easter and Christmas when a large number of Anglicans are attending church. This may be a way to attract nominal Anglicans as new donors. It is recommended in the Positioning section of this report that ABM’s appeals be reviewed. While it is suggested that the number of appeals be reduced to ensure resources are used effectively, it is noted that some appeals cannot be dropped due to church connections and the mission of ABM.

A Note

The above review and brief recommendations include some complex administrative processes. It must be noted that some of the suggestions are not always straightforward and consequently, to implement the changes time and staff resources are critical. However, there is no doubt that whilst significant time investment is required to initiate these fundraising tools, if technology and processes are used appropriately they should not be overly onerous tactics.

It is important to note some of the underlying issues that are limiting the effectiveness of ABM's fundraising tactics. Through the review of fundraising tactics the below issues have been identified. This is not an exhaustive list.

- Different technology platforms that track donations eg: Raiser's Edge and Net Community (online) make it difficult to track online donations and consequently reporting can be cumbersome.
- The complex nature of ABM's tax deductibility makes for complicated receipting. A detailed analysis of this issue has not been completed, as it was out of the scope of this project, but it is suggested that this tax deductibility be streamlined to enhance receipting for donors.
- As above, while it is suggested that the number of appeals be reduced to ensure resources are used efficiently, it is noted that some appeals cannot be dropped due to church connections and the mission of ABM.
- The nature and variety of ABM's diocesan committees makes it difficult to be aware of all events and local relationship building opportunities.

EVALUATION OF SUPPORT BASE GROWTH

The review of ABM's donor marketing or fundraising tactics highlights areas of improvement (indicated in red and orange) and these are also potential growth areas. Growth of ABM's support base can be derived from new donors as well as financial growth from existing supporters. This evaluation seeks to highlight how such growth may be achieved and is grounded in data analysis from ABM's Raiser's Edge database.

Background Data

The 2006 census reported 19% of Australians regarded themselves as Anglican. Since 1996, those affiliated with the Anglican faith decreased by 5% to 3.7 million. The results of the 2016 Census on August 9 should be considered with interest, as evidence shows the number of Anglicans is decreasing.

This census data would suggest that the ABM supporter base will also decrease. However, measures put into place now can offer growth from within the supporter base as well as attempt to attract new donors from within the wider Anglican Church.

Currently (as at March 2016) ABM has 14,422 supporters in its fundraising database, Raiser's Edge. Not all of these are active supporters but 9974 donors gave a donation in the last 10 years.

The largest numbers of supporters live in New South Wales and Victoria but the highest value average donation comes from donors in New South Wales and Western Australia. Almost 30% of ABM's top 100 donors (those who have given the largest amounts over their lifetime of support) are based in Sydney. Unfortunately, ABM does not have demographic data such as age and sex.

In the last 10 years, an average of 600 new donors have come on board each financial year but this correlates closely with the Emergency Appeal income results. Conversely, there are numbers of supporters being removed from the database. The most common reason for this attrition is that the supporter is deceased or a parish or organisation ceases to exist. For example in the financial year 2014-2015; 83 people were removed as deceased, 77 people asked to be removed and 185 supporters were removed due to mail returned to sender.

Annual fundraising income fluctuates due to Emergency Appeals and bequests. Excluding these funds there has been no significant variance (of plus or minus 10%) for the last five years. In some years income has grown by up to 9% while in others it has reduced by 6% so there is no consistent trend of increasing or decreasing fundraising income. The full table of campaign income of the last 5 years can be found in Appendix C.

Fundraising income of 10 and 20 years ago was \$2,886,736 and \$1,144,919 respectively. Again there is consistency in the income total in the last decade and growth from the decade prior. This may indicate a fewer number of supporters giving more money but detailed data analysis in this respect is limited due to the change to a new fundraising database in the recent years. Regardless, fundraising income as tracked in Raiser's Edge shows to be consistent in the last decade.

Growth Opportunities and Recommendations

The following are recommendations grounded in opportunities for retention and growth from within the existing supporter base.

Existing Supporter Base

7) Growth from Investing in Bequests

It is recommended that the new bequest tools mentioned in this review be rolled out by the Communication team to existing donors and supporter parishes. For further growth, the bequest material could also be distributed to Anglican retirement homes and all parishes. These tools should not stand alone but form part of a bequest strategy, which may also include an “In Memory” component, developed by Communications as a key part of the strategic marketing plan.

8) Growth through Major Donor and Philanthropic Development

It is recommended that research be undertaken to consider if major grants and philanthropic trusts be a viable fundraising option for ABM. The classification and recognition of ABM’s existing major donors is also a worthwhile investment from which to grow income. If ABM receives PBI status this may assist with growth in this area.

9) Re-engaging Lapsed Donors to see Growth

It is recommended that lapsed donors be communicated with to re-engage their support. It is much easier, and the return on investment much higher, to activate past supporters than develop relationships with new supporters. Phone calls and written communication, as noted above, are tools to assist ABM reconnecting with lapsed donors.

10) Implementing a Regular Giving Program

It is recommended that ABM harness the supporter loyalty and engagement that exists to develop a Regular Giving program. Whilst initially such a program can seem to reduce Appeal income, Regular Giving pledges generally return larger donations overall and also offer planned giving to assist with budget forecasts and future income stability. Note; ABM’s complex tax-deductibility on various projects must be considered for this program.

11) Growth of New Donors through Emergency Appeals

It is recommended that Emergency Appeals be used as acquisition campaigns to harness support from nominal Anglicans throughout the broader church. Growth success is proven by the example, outlined above, of the 2015 Vanuatu Emergency Appeal.

12) Online Donation Page Enhancement

It is recommended that the Communication team continues to assess how the donation part of the website can be enhanced. Suggestions include the use of images and a thank you video (a specific video thanking donors following their gift). It is acknowledged, the technology constraints present challenges in this space.

New Audiences

There is also opportunity to grow ABM's donor base by communicating with new audiences within the broader Anglican Church. The following are recommendations grounded in acquisition opportunities for growth from new audiences, although of course some individuals from within these audiences already support ABM.

13) New Audience Opportunities

It is recommended the below audiences are workshopped and prioritised by ABM's Communication team so that the recommended tools and tactics can be developed and actioned in the Strategic Marketing Plan in the following 12 month period.

Anglicans who regularly attend church but don't support ABM directly

This group falls into a number of segments: those who don't know about ABM, those who choose not to support ABM and those who give to ABM but through their parish, so ABM doesn't communicate directly with them. It is recommended that as part of the Strategic Marketing Plan brand awareness be improved. Tactics to be considered could include the brand refresh outlined in the overleaf positioning outline, media coverage in dioceses where traditional support is lacking and posters and flyers provided to all parishes. It may be useful to target mission secretaries and committees in relevant dioceses where support can be improved.

Clergy

This is a key audience for growth. Clergy are the gatekeepers to ABM communication in all parishes around the country. If the parish priest supports ABM, the congregation will likely follow. This audience is a busy one so to connect with clergy an incentive can be used. For example, clergy may promote ABM's programs further if they use resources that are prepared for them such as the existing Lenten Resource, as well as prayer reflections and other seasonal resources. It is recommended these tools become a central focus to encourage clergy support.

Theology Students

In order to have new clergy supporting ABM, it is an effective tactic to engage with theology students and in doing so aim to create lifelong ABM supporters. Where appropriate, speakers could be used in theological colleges and students engaged through the Education team. This feeds into the prior recommendation of a more strategic approach to the Speaker's Program.

Nominal Anglicans

This group of Anglicans only attend church for special occasions such as Easter, Christmas, funerals and christenings. The Easter and Christmas Appeals are key tools to engage this audience but in order to be successful, the campaigns must also be pushed by the clergy. An "In Memory" donation program may also be an option to fundraise at the time of funerals, albeit those who usually choose to offer such donations have been loyal ABM supporters.

Younger Anglicans

ABM doesn't have data regarding the age of its supporters but it is known that many of its supporters are older. For example, 74% of the recent supporter survey respondents were over 65. To attract an audience under 45 ABM could broaden its use of social media, use video as a story telling tool and refresh its logo and general branding to have a more modern feel.

Please note: the above brief recommendations and growth opportunity market segments are indications of tools and audiences that can be further developed in the final draft Strategic Marketing Plan, depending on the priorities chosen by the Communication team and management. This part of the report is simply an outline of potential growth segments rather than the detail and specific actions of how to engage with the audiences.

Summary of Evaluation of Growth

In conclusion, the growth of the ABM supporter base in the next five years can be achieved with some targeted marketing to existing supporters as well as new Anglican audiences. It should be noted that the broader Anglican demographic is a diminishing group so in the long term, the potential for growth of the ABM support base is limited.

However, the research and recommendations indicate there is potential for a small amount of growth, or at a minimum, the ability to maintain fundraising income in the next five years. This consistency has been demonstrated in the last five years so with some investment in the recommendations noted, growth should be achieved.

At this stage it is not recommended that growth opportunities outside of the Anglican Church be explored as this would require a complete shift in marketing resources, investment and organisation-wide strategy of ABM. One of the unique positioning points of ABM is its Anglican traditions, detailed in the following positioning summary, and this does not translate to a secular and very competitive marketplace.

POSITIONING SUMMARY

A review of ABM’s existing “products” or programs has been undertaken to determine their marketability. This has included research on the Community Development programs, the Church to Church program, the Reconciliation program and the Education program in order to analyse the different programs’ target audiences and consider the tactics used to promote each of these.

What follows is context about ABM’s wider brand positioning and a positioning summary of the programs as well as recommendations about the tactics that could be utilised to further communicate information about the programs to the relevant audience.

ABM’s Positioning

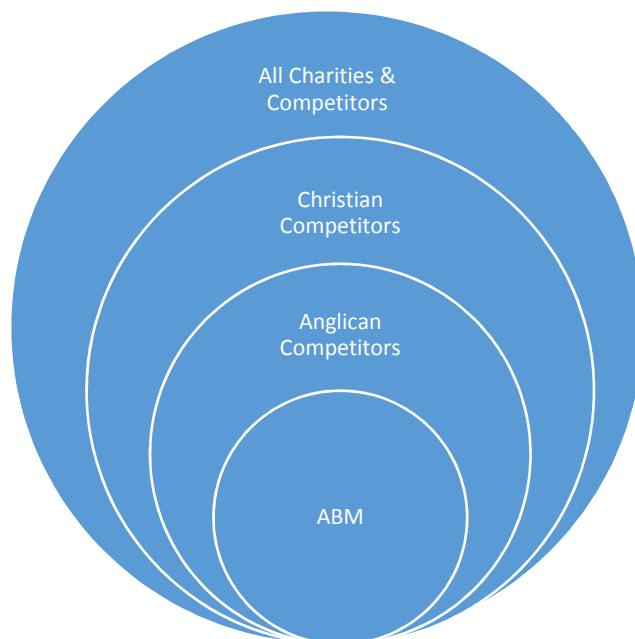
ABM’s 2010 marketing plan notes;

“ABM’s unique positioning can be expressed as:

ABM is the organisation through which Australians support the Anglican Church to help people in ways and places that other development organisations cannot. ABM gives Australian Anglicans the chance to be part of the global Anglican Community through overseas ministry and mission.”

“This positioning statement expresses the unique benefits that ABM provides to its supporters so that the marketing objective – to be recognised by Australian Anglicans as the preferred mission agency in Australia – can be achieved.”

ABM’s products’ positioning should be considered within the wider context of the whole brand. Within the Anglican agencies ABM is a traditional charity with a unique partnership model that has the potential to position ABM apart from other Anglican agencies. Competitors are detailed in the SWOT of this project and as noted in the diagram below, include other Anglican agencies, other church based agencies as well as any other charities or causes within the parishes and wider community.



ABM's Brand

It must be recognised, a brand is not simply a logo although the two are closely related. ABM has a strong brand basis, that being the emotional connection someone has with ABM. Or put differently, the brand encompasses the logo and design, the positioning, the messaging and communications, the target markets, the marketing and promotional tools and every touch point of ABM. It is clear a logo is a key component of ABM's brand.

In 2015 the Communication team conducted research which indicated that 80% of ABM's top supporters had a positive reaction to refreshing the brand through the use of the current ABM icon that is registered with IP Australia and a change in the shade of red used in ABM's material. (Please see Appendix D for visual representation.)

These changes were chosen to create a warmer shade of red in ABM's collateral and online. Also recommended was the reintroduction of the ABM icon graphic, used in the last 10 years, instead of simply the words and letters. The icon was placed on a sphere to represent ABM's work around the world. The tagline remains unchanged.

The positive feedback from supporters is powerful as it highlights a refresh in ABM's look and feel should be seriously considered. It also indicates strong historic ties amongst ABM supporters and is an emotional connection to the cause.

At the request of the Board, further research was conducted with an external audience in the form of an online survey. 74% of respondents indicated they preferred the refreshed logo and a further 76% of respondents preferred the matching refreshed website design. This external research correlated with that of ABM's top supporters.

In the below recommendations it is suggested that a logo refresh be seriously considered and the timing of implementation be given thought to ensure a consistency of the logo can roll out across annual publications, online and hard copy publications. It must be noted a logo should be used consistently so any changes should be rolled out across all of ABM's collateral in a timely manner.

ABM Programs' Positioning

Currently within ABM the programs are not strategically positioned to target slightly different audiences, although they naturally talk to different segments. Consequently, if repositioned fundraising income has the potential to grow as supporters are targeted rather than competing with ABM's own products.

Currently the Church to Church program connects with the traditional elderly Anglican but the need to connect further with clergy, parish secretaries and parish mission committees has been identified, as they are the gatekeepers to the parish's funding.

The Community Development and Reconciliation programs have similar audiences in that they appeal to a broader group of ABM supporters than the Church to Church program. Despite this broader potential, it is clear there is capacity to further target Anglicans who are concerned about reconciliation.

While the nature of the Education team's work is to work across all ABM audiences, there is significant potential to build resources and value-add for ABM's markets. There is additional ability to target a younger demographic through schools which is unique in the Education program.

ABM's fundraising income in the financial year 2015-2016 was 50% Community Development, 17% Reconciliation and 33% Church to Church.

Following interviews conducted with relevant staff, as well as knowledge of ABM's programs, each of the programs' current state (current audiences and communication tools) is briefly outlined below. Information about changes that team members think can make a positive impact in the marketing and fundraising of ABM is also included, some of which feeds the recommendations.

Community Development

Appeals, the website and the Project Book are the major tools used to promote the Community Development program. However, there is a belief that there may be some processes that can be improved to ensure the most marketable projects are chosen to ensure maximum fundraising opportunity.

Competitors of ABM tend to take a more generic approach to their fundraising, promoting water or children's projects for example, rather than a specifically named project. ABM's historic attempts of this have not yielded results due to highly engaged and loyal supporters. However, it is of interest that in the recent Supporter Survey 55% indicated an interest in "water projects" rather than existing project categories. There is potential to attempt a more generic approach and in particular aim to connect with a younger segment of ABM supporters.

The partnership and strengths-based approach of the Community Development program is a unique positioning point. The Community Development projects are supported by the largest number of constituents which highlights the broad appeal within the ABM audience. For example, over the last three financial years an average of 1735 donors have given to Community Development in comparison to 1238 to Church to Church or 980 to Reconciliation.

Community Development staff also believe the education, advocacy and justice work of ABM goes hand in hand with its marketing and consequently the team values the importance of sharing stories from partners (the Supporter Survey also highlighted 63% of respondents wanted to receive more stories from partners) and project updates as well as improving resources for ABM supporters.

Reconciliation

The Reconciliation program has been a small part of ABM's projects bringing in approximately \$275,051 of income in the last financial year. The existing ABM promotional tools such as the website and Project Book, as well as the original Reconciliation Appeal that was stopped in 2012, have been the main communication tools used to promote the program.

The staff members observe that much of this success and the effectiveness of these tools are due to the historic work that ABM has done in building relationships and trust with donors, rather than a real niche audience with a passion for reconciliation projects. The Supporter Survey indicated consistent rationale with the Reconciliation program receiving the least amount of interest (14%) when respondents were asked which ABM programs they prefer to support. Consequently, the potential to reposition and grow the audience of those interested and willing to donate to the Reconciliation program, as well as attracting new Anglican donors to this program, is larger than some of ABM's other products.

Detailed in the recommendations is the concept of regular project updates through varied media, something the Community Development programs also favoured. Staff members believe there is potential to revamp the way that ABM communicates about this work to promote it to Anglicans who are concerned about reconciliation. The communication tools should not just be website updates as data shows one of the Reconciliation project webpages was viewed only once in 2015. Varied media, like video, human interest stories and advocacy opinion pieces could be further explored and tools such as personalised email to directly market to targeted supporters, those who have identified interest in the Reconciliation program, should be chosen.

A Regular Giving Program (that should be wider than just the Reconciliation program but could commence with this program as a focus) has the potential to fit well with a younger audience segment and potentially attract new donors from within the Anglican Church interested in social justice and advocacy issues and create a consistent income for Reconciliation programs.

Staff members are also interested to learn of the potential of philanthropic trusts for the Reconciliation program and noted that much of this work will be led by the program team. It is important that this program-specific work links to any organisation-wide investigation to philanthropic trusts and major giving opportunities.

Church to Church

The Project Book and Appeals are currently the main way that the Church to Church projects attract funding. The Church to Church staff members believe the unique positioning for its program is the relationships with the three dioceses involved in the Good Friday Gift (Jerusalem, Egypt and Cyprus) as well as other relational partners. It should be questioned why an ABM donor wants to give to the Church to Church program, which previous ABM research shows is an opportunity to participate in ministry overseas.

Recent research asked a diverse group of ABM supporters to indicate which projects they prefer to support. 52% of respondents indicated ministry and evangelism projects as compared to 41% of people who selected Church to Church. When asked why they give to ABM only 3.5% of supporters indicated “to support other churches”. These are interesting results linked to the name, positioning and messaging of the Church to Church program.

The main audience segments of this program are clergy and parish mission committees and it is recognised that currently, elderly Anglicans are a significant portion of the target market. The Church to Church program staff question how they can replace these traditional supporters and also note Diocesan Synods are good opportunities to promote their work.

The team also believes there is potential to promote its work to congregations in Australia with multicultural backgrounds who may want to support the church in their home countries. For example, a Filipino congregation may want to help an ECP project or the Karen Anglican Youth Association in Melbourne may support a CPM project.

Education

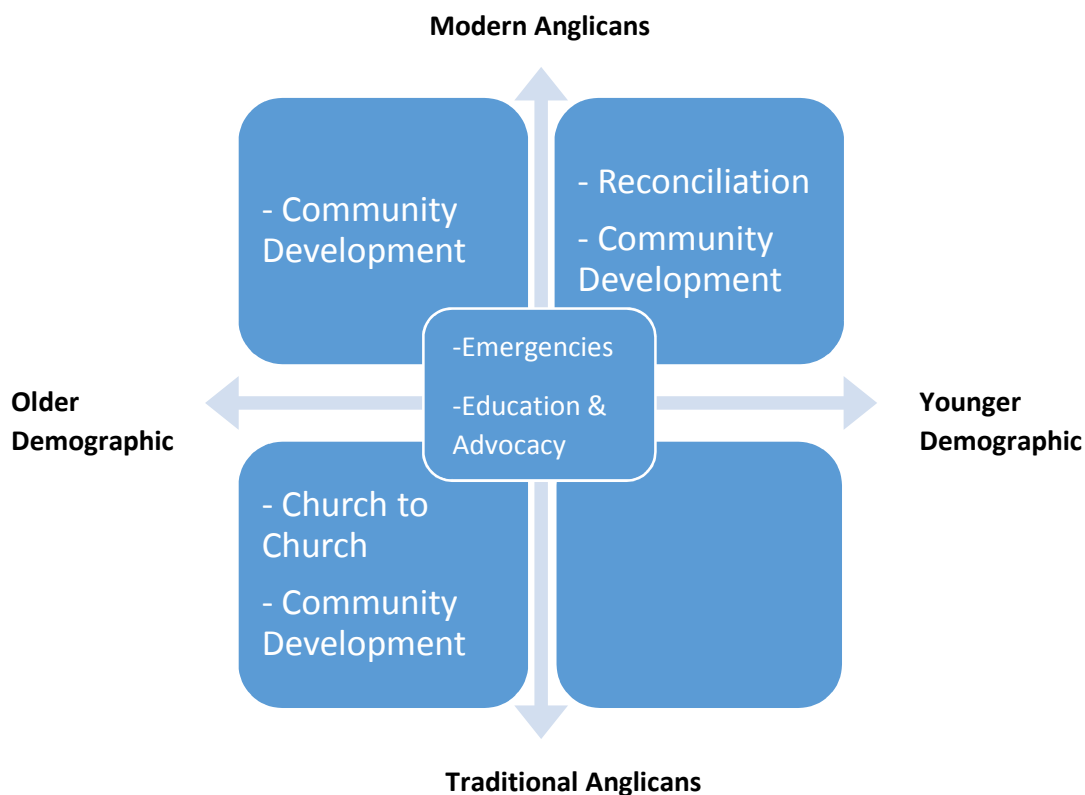
By their nature, the Education and Advocacy programs of ABM cut across the projects and target markets and due to this broad positioning have potential to grow. Informing and resourcing ABM’s supporters as well as offering them a real connection to ABM’s partners is a unique point of difference. To complement ABM’s mission work new resources, modelled on the success of the Lent Appeal and resources, would provide greater incentive for both Anglicans and clergy to support ABM.

The advocacy and justice role of ABM gives the organisation an authenticity and trust that other competitors are lacking. There is an opportunity for ABM to build on this supporter loyalty and engagement by offering resources which gives an extra incentive to support a well-respected cause that allows Anglicans to contribute to the church's mission.

The Education program has worked with schools and a younger Anglican demographic in recent years implementing the Schools' Challenge. This target audience has proven to be a difficult one to penetrate. Competitors invest budgets of hundreds of thousands of dollars into schools which has built strong relationships and costly resources with which ABM cannot compete. However, there is strong justification for attempting to connect with a younger Anglican audience to build lifetime supporters. The Education team may choose to continue working with schools but it must be noted that without significant investment, results will be limited.

Summary of Program Positioning

The positioning map below offers suggestions as to where the individual ABM programs or "products" can sit within the supporter base. Of course, these are generalisations grounded in research but will not fit 100% of ABM's supporters. The aim of this positioning is to ensure donor fatigue is limited, ie: not all donors are asked for everything, and consequently this more targeted marketing can produce an increase in fundraising income. The axes refer to all ABM supporters including individuals, organisations, parishes and clergy.



In summary, ABM's Community Development, including Emergency Appeals, and the Reconciliation programs have a high potential to connect with target audiences and return fundraising income. The Church to Church program has a reduced marketability based on the niche areas in which it works. However, by refining the target market to focus on clergy, results could be achieved. The Education and Advocacy programs have potential to grow by complementing ABM's work by resourcing Anglicans and clergy and providing greater incentive to support ABM. These "products" will help to reposition ABM in the minds of supporters as not only a worthwhile cause but a mission and ministry service to Anglicans.

A suggested new positioning statement for ABM as a whole is, *"ABM gives Australian Anglicans the chance to be part of the global Anglican Community through overseas ministry and mission. It seeks to be the preferred Anglican mission agency and therefore adds value to its supporters by providing mission and ministry resources grounded in partnership, advocacy and justice."*

Recommendations

To achieve steps to reposition ABM in the minds of supporters and target more specific segments of the ABM audience when promoting the various programs it is recommended:

14) Appeal Planning and Analysis

That the process and timeline of aligning appeals to projects be reassessed to ensure appeals and projects are matched to be more topical and timely. Consequently Communications will have the resources and ability to source the appropriate human interest stories from partners to ensure an emotional connection to the appeal. This recommendation also connects to the findings in the Donor Marketing Tactic Review which notes the large number and cost ratio of appeals. Refined planning and analysis of the cost ratios will allow for strategic decisions to be made about the number of appeals.

15) A Topical Appeal Trial

That, in conjunction with the above point, a higher level topical appeal is offered once a year (initially for comparison purposes). For example, water or education or gender empowerment rather than the specific project be used and the fundraising income received be used across relevant projects as determined useful by the programs. This may be most effective when connecting with a younger more modern audience segment.

16) A Targeted Approach to Appeal Communication

That a more targeted approach is taken to Appeal communication. Currently many ABM supporters receive all appeal requests despite their demographic. This recommendation is two phased as more demographic data is required in Raiser's Edge which can be achieved by washing the data from external sources. The second phase is to implement a more targeted approach based on those demographic or interests findings.

17) Communication and Reporting to Donors

That reporting back to donors on project outcomes is improved. Currently updates are done on the website but it is recommended that through improved use of Raiser's Edge, individual supporters could receive project updates, success stories and follow up donation requests

directly to their inbox. There is also potential to vary the media used to share such updates through the use of more video. These updates should be cross communicated across ABM's other media such as Facebook and the website.

18) Logo Refresh

That a logo refresh, which has the potential to rejuvenate ABM's brand to existing and new audiences, be seriously considered based on the internal and external feedback received. The timing of implementation should ensure a consistency of the logo roll out across annual publications, online and hard copy publications.

19) Regular Giving

That, in conjunction with Recommendation 10, a Regular Giving Program be developed and positioned to particularly target younger modern Anglicans. As a part of this program an additional resource or incentive, like prayer cards or similar, could be offered to donors in this program.

20) Grants and Philanthropic Trust Research

That Grants and Philanthropic Trust be investigated by the Reconciliation team. This must be done in conjunction with Recommendation 8 to ensure a consistent approach across the organisation.

21) Centenary of the Good Friday Gift

That to showcase the unique relationships in the Church to Church program and promote the program, the Centenary of the Good Friday Gift should be celebrated (in 2018).

22) Church to Church Rename

That the Church to Church program consider a rename, to better reflect its true work and position its projects more appropriately in the minds of supporters. Name suggestions should be workshopped and tested in key market segments before implementation. It is also recognised that this decision feeds into the broader strategic plan of ABM and the programs focus on partnerships and relationships so it is suggested, timing may be linked to broader decisions.

23) Resources

That the Education team work closely with Communications to develop more resources and ministry tools that can be promoted and shared with supporters and clergy to coincide with appeals and key seasons. This will act as incentive for the target markets to become familiar with ABM's work and support the cause, consequently positioning ABM as the preferred Anglican mission agency, grounded in partnership, advocacy and justice.

24) Schools

That unless schools are chosen by ABM's leadership as a strategic priority and the necessary investment allocated, marketing and fundraising resources be used in a limited way to connect with this target audience.

These recommendations are broad and this part of the report does not aim to offer a more detailed execution or action plan. However, it is suggested that following the draft strategic marketing plan, should this repositioning choose to be implemented, action plans should be developed by communications and the program staff for each program area. This will allow each portfolio area to own their specific marketing actions and ensure all staff members are clear with whom they are communicating.

A Note

Whilst conducting the research for this positioning summary the following was suggested. Whilst not a strategic recommendation, as it does not lend itself to the benefit of untied fundraising income, it has potential to offer an extra promotional opportunity for a specific program each year.

A way to promote the Church to Church and Reconciliation projects is to use the money raised by the ABM Stamp Collections for a single project in the following year. For example, the 2016 stamp income could get assigned to one of the less popular projects in 2017 and then promoted to supporters so that it would raise the profile of the project, the Partner and the stamp collection fundraising.

KEY MESSAGE ANALYSIS

Introduction

Messaging is a term to describe how ABM talks in simple language about who it is as an organisation and why it exists. Key messages aim to communicate key points that ABM should consistently make when communicating to each target audience and the messages should link back to ABM's brand and unique positioning points.

Through research with key stakeholders and analysis of ABM's existing key messages the below key message analysis is offered. These key messages link ABM's positioning, its programs (products) to its audiences to ensure they feel connected to and understand ABM's work and most importantly, take action.

Key Messages

The highlighted words in the below key messages are words that should be used as frequently as possible in ABM's communication with target audiences. The repetition reminds supporters of ABM's values and unique offerings.

Existing key messages that should continue to be used:

- ABM is the **national** mission agency of the **Anglican** Church of Australia
- ABM supports our **partners** to participate in God's **mission**
- Working for **Love, Hope and Justice**

New key messages recommendations:

- Supporting ABM is **mission and ministry in action**
- ABM provides a **connection** to its partners for Australian Anglicans as well as mission and ministry **resources** that enhance this relationship

When reviewing these messages it is clear how central Anglicanism is to ABM's work and consequently it should be embedded in its messaging. It is also of interest that in its original charter ABM was called to educate Anglicans for mission.

It must be noted that a complete strategic shift in mission and messaging would need to occur in order to attempt to attract an audience outside the Anglican Church.

Ideas for Program Specific Key Messages

These should be workshopped with relevant staff. Options to do so include the July Senior Staff meeting or prior to implementation in the Strategic Marketing Plan.

For the Community Development Program:

- Offering help and hope to vulnerable communities

For the Reconciliation Program:

- Make a difference in Australia

For the Church to Church Program:

- Giving to God's Mission

For the Education Program:

Note; this isn't a specific program key message as the team's work overlays all programs and consequently the messaging also sits in the above broad key messages.

- Resources and education provide a connection to ABM's partners that enhance and facilitate relationships and encourage action from supporters

Other terms of relevance include Living the Gospel and Discipleship.

Key Messages Summary and Recommendation

Recognising that attitudes drive behaviours which drive outcomes, the key messages should direct ABM's target audiences to:

Know

- About ABM's programs
- About the broader issues and goals ABM works to achieve
- How it contributes to Anglican faith
- How to help

Feel

- Resourced
- Informed
- Engaged
- God's Mission

Act

- Donate
- Pray
- Support ABM
- Ministry in Action

In summary, using consistent messaging in all of ABM's marketing and promotional tools will help to encourage existing and new ABM audiences to understand ABM's work, feel a connection to the organisation which affirms their faith and then act – whether that be to donate, pray or participate in ABM's work in some other way.

25) Key Message Recommendation

It is recommended that the outlined key messages be endorsed and/or workshopped, as a priority in ABM's marketing strategy, so that consistent communication can be utilised across all marketing and communication tools.

CONCLUSION

The documentation in this report is a sound basis for ABM's leadership to make decisions on when and how to invest in and develop its marketing and fundraising tools. Research has highlighted that ABM's programs are marketable to an Anglican demographic and there is potential to grow income from within this market segment, in the short term, by refining fundraising tools and strategically communicating with supporters.

As demonstrated throughout, and reflected in the recommendations, there is potential for growth within the existing supporter base as well as using the wider Anglican Church to attract new supporters. However, at this stage it is not recommended that growth opportunities outside of the Anglican Church be explored as this would require a complete shift in marketing resources, investment and organisation-wide strategy of ABM as a whole. One of the unique positioning points of ABM is its Anglican traditions and this does not translate to a secular and very competitive marketplace.

With investment in fundraising tactics, brand development and ensuring tailored and consistent communication to ABM's loyal supporter base as well as new acquisition audiences, ABM has a strong marketability.

Following feedback from ABM's Board and senior staff on this report and subsequent recommendations, a detailed draft strategic marketing plan will be produced. This plan should tie into the pending strategic planning framework of ABM and be both the strategy and actions required to implement the chosen recommendations from this body of work. Its actions would be driven by the Communication team and guided by the Marketing Working Group.

On a personal note, it has been a pleasure working on this project to support ABM's marketing potential and to offer insights and recommendations to encourage growth. I thank ABM for the opportunity.

Next Actions

As stated throughout this report, this research and recommendations are designed to inform ABM's leadership of the current state of ABM's marketing and offer insights to growth opportunities.

The next step in this process is for the Board to endorse, or provide feedback on, the recommendations so that a Strategic Marketing Plan can be produced based on the findings in this report.

The plan would be developed, based on the chosen priorities and include more detailed action and execution strategies, timeline and budgets to ensure the recommendations and objectives are achieved. The Marketing Working Group and Communications team would drive the implementation of this plan, following the Board's endorsement.

TIMELINE & RECOMMENDATION SUMMARY

As noted in the Executive Summary, it is acknowledged that the recommendations throughout this report are plentiful and, despite their interconnection, may appear disparate. They have been grouped in the relevant sections to ensure this document is an effective tool for ABM to implement changes to see growth and development in its marketing and fundraising tactics. However, to ensure this report is used as a working document, below is a timeline that offers a phased approach for the implementation of the recommendations. There is also a recommendation summary table in the Appendix.

60 day actions

- Stakeholder engagement recommendations including enhancement of Speaker's program administration and monitoring, the development of an info-graphic resource and a new ABM Associate welcome pack. (Recommendations 1 to 6)
- Fundraising tools on which work has already commenced, such as the Bequest Program and Emergency Appeals, be endorsed and implemented. (Recommendations 7, 11 & 12)
- A decision is required as to whether the brand refresh of ABM should be implemented, based on the recommendations and research. (Recommendation 18)
- That the key messages be endorsed and/or workshopped so that consistent communication can be utilised across all marketing and communication tools. (Recommendation 25)

6 month actions

- Research into the suitability of investing into philanthropic trusts. (Recommendation 8 & 20)
- Regular Giving development and Lapsed Donor reengagement.(Recommendations 9, 10 & 19)
- ABM's Appeals are evaluated including the cost ratio, the process of aligning projects to appeals and the consideration of a topical appeal. (Recommendations 14,15 & 16)
- Work commenced on Raiser's Edge to allow targeted communication to donors based on their giving trends. (Recommendation 17 and general analysis noted in the Fundraising Tactic Review)
- The recommendations relating to program positioning be prioritised by the respective program teams and Communications and timelines be implement for the following period. (Recommendations 21,22 & 24)
- The development of more ministry and mission resources be produced to act as a re-positioning tool as well as enhance ABM's supporter engagement with new and existing audiences. (Recommendation 23)

12 months and beyond actions

- Investment in philanthropic trusts, if deemed strategic. (Recommendation 8 & 20)
- Implementation of fundraising tools and marketing tactics that engage audiences within the broader Anglican Church including clergy, theology students, nominal Anglicans and those outlined in the Evaluation of Growth section. (Recommendation 13)

Should this phased timeline wish to be implemented, a detailed Gantt chart can be included in the strategic marketing plan.

APPENDIX

Appendix A

Data relating to new donors and Emergency Appeal income as referenced in the Audit.

Year	New Donors	Emergency Appeal Income
2005-2006	876	
2006-2007	938	
2007-2008	838	
2008-2009	448	239,195
2009-2010	647	199,268
2010-2011	357	357,151
2011-2012	449	177,000
2012-2013	435	236,431
2013-2014	737	444,402
2014-2015	749	602,935
2015-2016	243	165,561

Appendix B

Info-graphic example



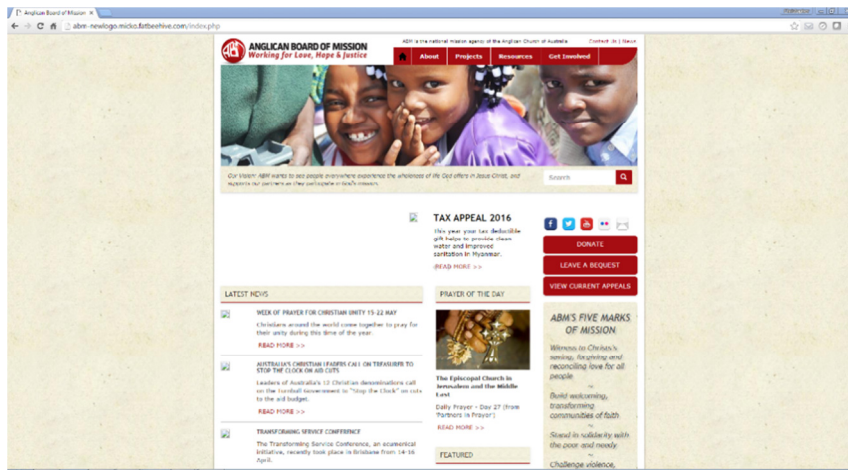
Appendix C

Segmented and total campaign income.

Campaign Category	Year to 30 June:								
	Actual 2008	Actual 2009	Actual 2010	Actual 2011	Actual 2012	Actual 2013	Actual 2014	Actual 2015	Actual 2016
Advent	38,524	43,334	35,929	31,238	38,860	50,280	33,230	50,582	53,147
Auxiliary	74,653	90,648	101,096	104,770	77,137	69,468	65,515	48,495	46,541
No Campaign	601,945	669,027	749,346	760,344	714,043	899,869	1,124,460	1,307,533	813,485
Good Friday	68,075	123,629	123,578	134,446	110,668	148,626	131,242	114,872	126,316
Lent Appeal	153,239	215,672	237,541	196,375	203,835	197,286	165,107	173,800	148,399
Martyrs	46,568	49,610	72,682	107,296	66,695	51,902	56,635	47,251	42,852
November	28,264	60,987	29,443	34,606	24,354	35,694	32,753	37,393	31,364
Partners	12,593	31,694	4,179	6,516	5,625	-	-	0	0
Prayer Diary	-	0	43,133	8,271	-	1,255	1,435	0	1,605
Project Book	562,211	662,894	614,058	825,431	780,957	619,368	438,248	140,011	739,664
Tax	20,665	53,451	63,361	67,908	117,695	79,715	60,403	70,139	93,361
Easter Gift Appeal						-	24,052	21,451	22,631
Christmas Gift Appeal						1,390	18,999	23,461	16,525
Schools Campaign						1,454	3,544	3,538	100
Indigenous		0	15,285	8,501	-	-	-	0	
Campaign Income	1,606,737	2,000,946	2,089,631	2,285,702	2,139,869	2,156,307	2,155,624	2,038,527	2,135,991
Change on prior year	-92%	8%	4%	9%	-6%	1%	0%	-5%	5%
Average Per Month	133,895	166,746	174,136	190,475	178,322	179,692	179,635	169,877	177,999
Bequests	264,899	191,629	52,921	227,680	493,179	141,155	442,986	252,503	226,109
Emergency Programs	239,195	239,195	199,268	357,151	177,000	21,868	444,402	602,935	167,670
Total	2,110,831	2,505,040	2,467,147	2,701,484	2,406,804	2,881,985	3,043,012	2,893,964	2,529,770
	-108%	-8%	-8%	9%	-11%	20%	6%	-5%	-13%

Appendix D

Reintroduction of the old logo and consistent website design.



Appendix E

Recommendation Table

Recommendation	Responsibility	Action
<p>1) <u>Committee Structure</u> Whilst the committee structure could certainly be streamlined to improve efficiencies, it is recognised this is almost impossible for management to do given the voluntary nature of the committees and the history behind each diocese's establishment of its group. Therefore, it is recommended the committees continue to receive communication as is currently the practice and consequently, they will continue to be used as engaged, useful local resources.</p>	Board	Noted
<p>2) <u>Info-graphic Resource</u> It has been identified that some stakeholders would benefit from a new resource that clearly but simply highlights the work of ABM or explains the complex nature of some of ABM's work. It is recommended that an info-graphic be developed. (See example in Appendix B). This tool will simplify ABM's complex messages and may also appeal to a younger audience. It could be shared electronically and as a hard copy flyer.</p>	Management	Marketing team to design
<p>3) <u>Diocesan Representatives Conference</u> It is evident that the Diocesan Representatives Conference is a key tool to communicate with the representatives and is highly valued by this audience. It is recommended that this conference continue to be used as a significant marketing tactic and as part of the conference, representatives be further resourced with tools they can take back to their dioceses. Eg: posters, videos on usb and the new info-graphic. Some representatives also indicated they would find general marketing education useful such as speaking tools (see Recommendation 4) or social media education and such teaching could be a part of the conference.</p>	Management	Marketing team to action
<p>4) <u>Speaker Program Administration Review</u> Many of ABM's stakeholders may be used as, or interact with, ABM speakers. Feedback from different audiences indicated they would like more ABM speakers or, that as an ABM speaker they would like more training and presentations made available. While there are many challenges in sourcing quality speakers and tracking speakers, it is recommended that the Speaker Program administration be reviewed by the Communication team and tools such as speaking presentations, training, feedback and donation tracking be further developed. This may not require new resources but simply existing tools being presented to potential speakers in a different format as a training package. This may encourage new speakers as well as motivate existing ones.</p>	Management	Marketing team to action
<p>5) <u>ABM Auxiliary</u> The Auxiliary is a reasonably effective fundraising group. Feedback</p>	NA	

<p>indicated that the Project Kit for the Auxiliary project is well presented and useful so it is therefore recommended that these tools be continued.</p>		
<p>6) <u>ABM's Associates' Welcome Pack</u> ABM's Associates pay a fee as an "expression of commitment to ABM". It is recommended that as part of this commitment, the Associates be encouraged to market ABM further in their own circles. Associates should receive a welcome pack (electronic or hard copy) upon payment of their fee which could include resources to both inform them and be shared with others. As with the above speaker tools, these may simply be existing resources like videos, flyers and the new info-graphic that can be packaged as an Associate Welcome Pack.</p>	<p>Management</p>	<p>Marketing team to action</p>
<p>7) <u>Growth from Investing in Bequests</u> It is recommended that the new bequest tools mentioned in this review be rolled out by the Communication team to existing donors and supporter parishes. For further growth, the bequest material could also be distributed to Anglican retirement homes and all parishes. These tools should not stand alone but form part of a bequest strategy, which may also include an "In Memory" component, developed by Communications as a key part of the strategic marketing plan.</p>	<p>Management</p>	<p>New Bequest brochure in production</p>
<p>8) <u>Growth through Major Donor and Philanthropic Development</u> It is recommended that research be undertaken to consider if major grants and philanthropic trusts be a viable fundraising option for ABM. The classification and recognition of ABM's existing major donors is also a worthwhile investment from which to grow income. If ABM receives PBI status this may assist with growth in this area.</p>	<p>Management</p>	<p>Item already budgeted</p>
<p>9) <u>Re-engaging Lapsed Donors to see Growth</u> It is recommended that lapsed donors be communicated with to re-engage their support. It is much easier, and the return on investment much higher, to activate past supporters than develop relationships with new supporters. Phone calls and written communication, as noted above, are tools to assist ABM reconnecting with lapsed donors.</p>	<p>Management</p>	<p>Marketing team to action</p>
<p>10) <u>Implementing a Regular Giving Program</u> It is recommended that ABM harness the supporter loyalty and engagement that exists to develop a Regular Giving program. Whilst initially such a program can seem to reduce Appeal income, Regular Giving pledges generally return larger donations overall and also offer planned giving to assist with budget forecasts and future income stability. Note; ABM's complex tax-deductibility on various projects must be considered for this program.</p>	<p>Management</p>	<p>Marketing team to action</p>

<p>11) <u>Growth of New Donors through Emergency Appeals</u> It is recommended that Emergency Appeals be used as acquisition campaigns to harness support from nominal Anglicans throughout the broader church. Growth success is proven by the example, outlined above, of the 2015 Vanuatu Emergency Appeal.</p>	Management	Already in progress
<p>12) <u>Online Donation Page Enhancement</u> It is recommended that the Communication team continues to assess how the donation part of the website can be enhanced. Suggestions include the use of images and a thank you video (a specific video thanking donors following their gift). It is acknowledged, the technology constraints present challenges in this space.</p>	Management	Marketing team to action
<p>13) <u>New Audience Opportunities</u> It is recommended the below audiences are workshopped and prioritised by ABM’s Communication team so that the recommended tools and tactics can be developed and actioned in the Strategic Marketing Plan in the following 12 month period.</p>	Management	Marketing team to action
<p>14) <u>Appeal Planning and Analysis</u> That the process and timeline of aligning appeals to projects be reassessed to ensure appeals and projects are matched to be more topical and timely. Consequently Communications will have the resources and ability to source the appropriate human interest stories from partners to ensure an emotional connection to the appeal. This recommendation also connects to the findings in the Donor Marketing Tactic Review which notes the large number and cost ratio of appeals. Refined planning and analysis of the cost ratios will allow for strategic decisions to be made about the number of appeals.</p>	Management	Marketing team to action
<p>15) <u>A Topical Appeal Trial</u> That, in conjunction with the above point, a higher level topical appeal is offered once a year (initially for comparison purposes). For example, water or education or gender empowerment rather than the specific project be used and the fundraising income received be used across relevant projects as determined useful by the programs. This may be most effective when connecting with a younger more modern audience segment.</p>	Management	Already underway. Marketing team to continue to action
<p>16) <u>A Targeted Approach to Appeal Communication</u> That a more targeted approach is taken to Appeal communication. Currently many ABM supporters receive all appeal requests</p>	Management	Already underway. Marketing

<p>despite their demographic. This recommendation is two phased as more demographic data is required in Raiser's Edge which can be achieved by washing the data from external sources. The second phase is to implement a more targeted approach based on those demographic or interests findings.</p>		<p>team to continue to action</p>
<p>17) <u>Communication and Reporting to Donors</u> That reporting back to donors on project outcomes is improved. Currently updates are done on the website but it is recommended that through improved use of Raiser's Edge, individual supporters could receive project updates, success stories and follow up donation requests directly to their inbox. There is also potential to vary the media used to share such updates through the use of more video. These updates should be cross communicated across ABM's other media such as Facebook and the website.</p>	<p>Management</p>	<p>Already underway. Marketing team to continue to action</p>
<p>18) <u>Logo Refresh</u> That a logo refresh, which has the potential to rejuvenate ABM's brand to existing and new audiences, be seriously considered based on the internal and external feedback received. The timing of implementation should ensure a consistency of the logo roll out across annual publications, online and hard copy publications.</p>	<p>Board</p>	<p>Decision requested</p>
<p>19) <u>Regular Giving</u> That, in conjunction with Recommendation 10, a Regular Giving Program be developed and positioned to particularly target younger modern Anglicans. As a part of this program an additional resource or incentive, like prayer cards or similar, could be offered to donors in this program.</p>	<p>Management</p>	<p>Marketing team to action</p>
<p>20) <u>Grants and Philanthropic Trust Research</u> That Grants and Philanthropic Trust be investigated by the Reconciliation team. This must be done in conjunction with Recommendation 8 to ensure a consistent approach across the organisation.</p>	<p>Management</p>	<p>Marketing team to action</p>
<p>21) <u>Centenary of the Good Friday Gift</u> That to showcase the unique relationships in the Church to Church program and promote the program, the Centenary of the Good Friday Gift should be celebrated (in 2018).</p>	<p>Management</p>	<p>Marketing team to action</p>
<p>22) <u>Church to Church Rename</u> That the Church to Church program consider a rename, to better reflect its true work and position its projects more appropriately in the minds of supporters. Name suggestions should be workshopped and tested in key market segments before implementation. It is also recognised that this decision feeds into the broader strategic plan of ABM and the programs focus on partnerships and relationships so it is suggested, timing may be linked to broader decisions.</p>	<p>Management & Partnership Committee</p>	<p>Marketing and P'tnership teams to action</p>

<p>23) <u>Resources</u> That the Education team work closely with Communications to develop more resources and ministry tools that can be promoted and shared with supporters and clergy to coincide with appeals and key seasons. This will act as incentive for the target markets to become familiar with ABM’s work and support the cause, consequently positioning ABM as the preferred Anglican mission agency, grounded in partnership, advocacy and justice.</p>	Management	Marketing and Education team to action
<p>24) <u>Schools</u> That unless schools are chosen by ABM’s leadership as a strategic priority and the necessary investment allocated, marketing and fundraising resources be used in a limited way to connect with this target audience.</p>	NA	
<p>25) <u>Key Message Recommendation</u> It is recommended that the outlined key messages be endorsed and/or workshopped, as a priority in ABM’s marketing strategy, so that consistent communication can be utilised across all marketing and communication tools.</p>	Management	Prepare a report to the Board