**ABM Marketing Review 2016**

**Status Report – May 2017**

Following the 2016 ABM marketing project that identified various opportunities for development of marketing and fundraising tactics, a draft Action Plan has been developed. It seeks to outline the chosen priorities and develop detailed procedures, timelines and budget allocations.

Priorities were delegated by the Communication Team’s annual planning day and it was noted that some specific priorities require a more detailed strategic plan produced. The below table seeks to provide a high level update on elements of the original plan and their progress. It must be noted that the vacancy of the Database Administrator in the team has limited some progress.

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| **Recommendation** | **Responsibility** | **Action** | **Status** | **Update and Notes** |
| 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. | Board | Noted |  | NA |
| 1. 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. | Management | Marketing team to design |  | Department specific infographics have started to be used.Due to the complex nature of ABM, the organisation wide infographic is taking a little time.Work has commenced with the designer and we will have the first draft back in mid-June. |
| 1. 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. | Management | Marketing team to action |  | The Communication team is currently planning the Diocesan Representatives Conference. |
| 1. 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. | Management | Marketing team to action |  | Marketing Manager is currently undertaking a review from various Diocesan Reps to find out what resources they want in order to fulfil speaking requests. The overwhelming majority of people are wanting videos of our projects produced with real people in them. |
| 1. 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.  | NA |  |  | NA |
| 1. 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. | Management | Marketing team to action |  | This recommendation was put on hold by the Executive Director pending an outcome from the Marketing Working Group. |
| 1. 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. | Management | New Bequest brochure in production |  | Chris, Mike and Rob have progressed with the roll out of some bequest material and are analysing the most strategic bequest prospects to give a strong foundation to a broader bequest strategy. The Marketing Working Group suggested targeting individuals who give monthly as the 1st stage; then large donors separately and maybe combine with Major Donor event?Much discussion about the Bequest Program has taken place and the following action plan has been workshopped with key staff personnel:* An advertisement was placed on this year’s Wallplanners
* An appropriate staff member to become the ABM Bequest Corresponder. They will take incoming calls from people wanting more information about leaving ABM a bequest.
* Receipts will be updated in June to include information on ABM’s bequest program and asking people to contact ABM’s Bequest Corresponder.
* Appeal flyers are to include a tick box asking people if they wish to receive more information about the bequest program.
* A focus group made up of some of the Auxiliary will be approached to give feedback on how to roll out the Bequest Program
* The Diocesan Reps will be trained in July on promoting the Bequest Program.
* Bequest brochures will be included with the Prayer Diary mailing at the end of 2017.
* A survey in 2018 will help measure and gage the effectiveness of this process.
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| 1. 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. | Management | Item already budgeted |  | The Marketing Working Group wanted more information about who this market is. i.e. How many are there? Inds and Orgs? What they give to - projects, general, themes, movements. Suggested a yearly function - 20/20 Event - to say Thank You. How do we decide who to invite? Top 40 givers? The two groups very distinct.For orgs - invite the vicar + warden or someone else.12 month period - how much?Need someone who's job it is to make this happen - identify who should be there. 17/8/17 – Major donors (individuals given over $3,000 a year to non-emer and non-bequest) equal 35, with average donation of $9,460. With our top giver taken out that makes the average donation about $5,000.It was decide that these donors need an individual action plan about how they want to be communicated with. John Deane would need to be brought into this process.Post MWG meeting – we have 100 High category donors giving an average of $1,702.A separate strategy needs to be deployed in communicating with this group of people. Can be more collective than for major donors. |
| 1. 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.  | Management | Marketing team to action |  | Work has commenced to prepare the donor database so that targeted project information can be communicated with lapsed donors to re-engage their support. There is significant work required to ensure preparation work is done accurately to build a successful lapsed donor engagement strategy. The Marketing Working Group suggested getting IP from other orgs around this issue. Ask Database Supervisor what criteria was used in other organisations. Identify why they're giving- country specific; theme specific; 17/8/17 – ABM has 2,280 lapsed donors with an average donation of $451. The MWG decided that we could re-engage 10% of them and their average donation would be between 25 and 50%. So, a campaign to these people would re-engage 228, with an average donation of $200, increasing ABM income by $45,600.  |
| 1. 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. | Management | Marketing team to action |  | Work has not commenced as this is connected to the above point preparing the donor database to ensure ABM invites the appropriate donor segments to join a regular giving program.17/8/17 – It was identified that a telephone campaign should be used for the 86 Lapsed Regular Givers, after deceased and notes on each record have been taken into account. It was also decided that a telephone campaign be introduced to engage with Active Regular Givers to identify where giving could be increased. |
| 1. 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.  | Management | Already in progress |  | Will be further tested in the next Emergency Appeal.MWG: Same strategy as Lapsed. Build on what we're doing. |
| 1. 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.  | Management | Marketing team to action |  | The donation pages have now been optimised for mobile devices. We have discovered issues with overseas donations, but his is a technology issue that all organisations using Online Express are having. Database Supervisor and Marketing Manager to have strategic discussions with other agencies and then with Blackbaud (Online Express people).Communications team are working on the use of images and videos on thank you pages.  |
| 1. 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. | Management | Marketing team to action |  | To commence |
| 1. 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. | Management | Marketing team to action |  | Planned to commence for 2018 planning. |
| 1. 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. | Management | Already underway. Marketing team to continue to action |  | The current tax appeal is themed on a topic and will be measured and evaluated as compared to previous tax appeals on a specific project. |
| 1. 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.  | Management | Already underway. Marketing team to continue to action |  | See comments in recommendation 9. Analysis of the donor database is underway. |
| 1. 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.  | Management | Already underway. Marketing team to continue to action |  | Jess continues to write comprehensive updates. The delivery of these to targeted donor segments is reliant on the above mentioned analysis of the donor database. All project pages now have a friendly URL which is [www.abmission.org/[PROJECTCODE](http://www.abmission.org/%5BPROJECTCODE)] This is put on the bottom of every receipt letter now.All new project updates are listed in On-A-Mission.Strategy working out how we update supporters who miss/don’t read these communications to be worked out. |
| 1. 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.  | Board | Decision requested |  | Completed. |
| 1. 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. | Management | Marketing team to action |  | See notes in recommendation 10. |
| 1. 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. | Management | Marketing team to action |  | See notes in recommendation 8. |
| 1. 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).  | Management | Marketing team to action |  | To be planned for 2018. |
| 1. 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. | Management & Partnership Committee | Marketing and P’tnership teams to action |  | To commence. Marketing Manager to be invited to Partnerships Meeting (which incorporates Church to Church) |
| 1. 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. | Management | Marketing and Education team to action |  | This work is ongoing. Additional resources for Reconciliation Week and the usual Lent resources have been released in 2017.Partners Magazine to be included in General Synod welcome pack this year. |
| 1. 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. | NA |  |  | NA |
| 1. 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. | Management | Prepare a report to the Board |  | Key messages were workshopped at the 2017 Communication Team planning day and a tool was subsequently developed for use at appropriate leadership forums if required.  |

Last Updated: 18/05/2017