

**The University of Kansas**  
**Integrated Marketing Communications Program Student Project Release Form**

---

Student papers, projects, and other academic creations, whether in printed or electronic form, nearly always enjoy automatic copyright protection as soon as the work is fixed in some tangible form. Student academic creations might also constitute academic records and be subject to privacy protections under other federal and state laws.

Kansas Board of Regents Intellectual Property Policy (Section A.5), the Student Records Policy, and other federal and state laws (e.g., the Family Educational Rights and Privacy Act and the Kansas Open Records Act) may define and protect student records and other privacy interests relating to the use and release of materials arising out of or prepared for educational endeavors.

By signing below, the student and the client are specifically authorizing the release of the student's or students' project for the purposes set forth in this document, authorizing disclosure of the student's work to others, and is relinquishing and waiving any claims that may arise under any statutory or common law protections as a result of the use of this project for these purposes.

---

The University of Kansas Libraries will accept student academic creations only if the student(s) and the client sign this permission form below.

Literacy Kansas City Marketing Communications Plan  
Title of the student's/students' master's project/research paper

1. Margaret Hair

2. Stephanie Maddox

November 16, 2015  
Date the project or research paper was accepted by the Journalism faculty

3. \_\_\_\_\_  
Student's/Students' name(s) (type or print)

Scott Reinardy  
Journalism Assoc. Dean's name (type or print)

\_\_\_\_\_  
Journalism Assoc. Dean's signature

Check one of the boxes below acknowledging the following permissions:

As the Creator/Author of this project or research paper, I grant the University of Kansas (KU) permission to place my master's degree project or research paper into KU ScholarWorks for permanent electronic preservation and for distribution worldwide in any format or medium for non-commercial academic purposes only. I understand that a paper copy of my project may also be deposited at the KU Edwards Campus in the Regents Center Library and/or in the offices of the Integrated Marketing Communications program.  
Student's/Students' Initials: 1. MH 2. \_\_\_\_\_ 3. \_\_\_\_\_

As the Creator/Author of this project or research paper, I do NOT give my permission for my project or research paper to be placed, through an electronic copy, into KU ScholarWorks, but I GRANT the University of Kansas permission for a paper and/or electronic copy of my project to be placed on reserve at the KU Edwards Campus library and/or in the Integrated Marketing Communications program offices for the use of future Integrated Marketing Communications students, faculty, and staff.  
Student's/Students' Initials: 1. \_\_\_\_\_ 2. \_\_\_\_\_ 3. \_\_\_\_\_

As the Client/Subject of this project or research paper, I grant the University of Kansas (KU) permission to place this master's degree project or research paper into KU ScholarWorks for permanent electronic preservation and for distribution worldwide in any format or medium for non-commercial academic purposes only. I understand that a paper copy of this project may also be deposited at the KU Edwards Campus in the Regents Center Library and/or in the offices of the Integrated Marketing Communications program.  
Client's Initials: SH

As the Client/Subject of this project or research paper, I am aware that under certain unusual circumstances clients are allowed to redact certain information that they consider "proprietary." I would like to exercise my right for redactions and they will be indicated on a copy of the original plans book.  
Client's Initials: \_\_\_\_\_

**The University of Kansas**  
**Integrated Marketing Communications Program Student Project Release Form**

---

- As the Client/Subject of this project or research paper, I do NOT give my permission for this project or research paper to be placed, through an electronic copy, into KU ScholarWorks, but I GRANT the University of Kansas permission for a paper and/or electronic copy of this project to be placed on reserve at the KU Edwards Campus library and/or in the Integrated Marketing Communications program offices for the use of future Integrated Marketing Communications students, faculty, and staff.


Client's Initials: \_\_\_\_\_

*I represent that this submission is my own original work and that my project or research paper does not, to the best of my knowledge, infringe upon anyone's copyright. I also represent and warrant that this submission contains no libelous or other unlawful matter and makes no improper invasion of the privacy of any other person.*

*I understand that, as the author of this work, I retain copyright. I grant to the University of Kansas a limited, non-exclusive license to disseminate my project or research paper through the repository and to migrate my project or research paper (i.e., copy it) for preservation purposes at any time in the future and as many times as necessary.*

*I understand that no changes will be made to the content of my project or research paper, but that slight modifications in format might occur during the process of conversion.*

*I understand that I may revoke this authorization for disclosure or use of my academic creation at any future date by giving written notice to the University of Kansas Libraries that I would like my project or research paper to be removed from KU ScholarWorks. (An archived electronic copy will be kept, but it will not be accessible to anyone but the administrators of KU ScholarWorks.) In addition, if my project or research paper is removed from KU ScholarWorks, I may authorize that a paper and/or electronic copy be kept as designated in the second check box above.*

  
\_\_\_\_\_  
Student's Signature

1/12/16  
\_\_\_\_\_  
Date


\_\_\_\_\_  
Student's Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Student's Signature

\_\_\_\_\_  
Date

*As the Client/Subject, I understand that I may revoke this authorization for disclosure or use of this academic creation at any future date by giving written notice to the University of Kansas Libraries that I would like this project or research paper to be removed from KU ScholarWorks. (An archived electronic copy will be kept, but it will not be accessible to anyone but the administrators of KU ScholarWorks.) In addition, if this project or research paper is removed from KU ScholarWorks, I may authorize that a paper and/or electronic copy be kept as designated in the second check box above.*

  
\_\_\_\_\_  
Client's Signature

1/11/16  
\_\_\_\_\_  
Date

**The University of Kansas**  
**Integrated Marketing Communications Program Student Project Release Form**

---

Student papers, projects, and other academic creations, whether in printed or electronic form, nearly always enjoy automatic copyright protection as soon as the work is fixed in some tangible form. Student academic creations might also constitute academic records and be subject to privacy protections under other federal and state laws.

Kansas Board of Regents Intellectual Property Policy (Section A.5), the Student Records Policy, and other federal and state laws (e.g., the Family Educational Rights and Privacy Act and the Kansas Open Records Act) may define and protect student records and other privacy interests relating to the use and release of materials arising out of or prepared for educational endeavors.

By signing below, the student and the client are specifically authorizing the release of the student's or students' project for the purposes set forth in this document, authorizing disclosure of the student's work to others, and is relinquishing and waiving any claims that may arise under any statutory or common law protections as a result of the use of this project for these purposes.

---

The University of Kansas Libraries will accept student academic creations only if the student(s) and the client sign this permission form below.

Literacy Kansas City Marketing Communications Plan  
Title of the student's/students' master's project/research paper

1. Margaret Hair

2. Stephanie Maddox

November 16, 2015  
Date the project or research paper was accepted by the Journalism faculty

3.  
Student's/Students' name(s) (type or print)

Scott Reinardy  
Journalism Assoc. Dean's name (type or print)

Journalism Assoc. Dean's signature

Check one of the boxes below acknowledging the following permissions:

As the Creator/Author of this project or research paper, I grant the University of Kansas (KU) permission to place my master's degree project or research paper into KU ScholarWorks for permanent electronic preservation and for distribution worldwide in any format or medium for non-commercial academic purposes only. I understand that a paper copy of my project may also be deposited at the KU Edwards Campus in the Regents Center Library and/or in the offices of the Integrated Marketing Communications program.

Student's/Students' Initials: 1. SM 2. \_\_\_\_\_ 3. \_\_\_\_\_

As the Creator/Author of this project or research paper, I do NOT give my permission for my project or research paper to be placed, through an electronic copy, into KU ScholarWorks, but I GRANT the University of Kansas permission for a paper and/or electronic copy of my project to be placed on reserve at the KU Edwards Campus library and/or in the Integrated Marketing Communications program offices for the use of future Integrated Marketing Communications students, faculty, and staff.

Student's/Students' Initials: 1. \_\_\_\_\_ 2. \_\_\_\_\_ 3. \_\_\_\_\_

As the Client/Subject of this project or research paper, I grant the University of Kansas (KU) permission to place this master's degree project or research paper into KU ScholarWorks for permanent electronic preservation and for distribution worldwide in any format or medium for non-commercial academic purposes only. I understand that a paper copy of this project may also be deposited at the KU Edwards Campus in the Regents Center Library and/or in the offices of the Integrated Marketing Communications program.

Client's Initials: \_\_\_\_\_

As the Client/Subject of this project or research paper, I am aware that under certain unusual circumstances clients are allowed to redact certain information that they consider "proprietary." I would like to exercise my right for redactions and they will be indicated on a copy of the original plans book.

Client's Initials: \_\_\_\_\_

The University of Kansas  
**Integrated Marketing Communications Program Student Project Release Form**

---

- As the Client/Subject of this project or research paper, I do NOT give my permission for this project or research paper to be placed, through an electronic copy, into KU ScholarWorks, but I GRANT the University of Kansas permission for a paper and/or electronic copy of this project to be placed on reserve at the KU Edwards Campus library and/or in the Integrated Marketing Communications program offices for the use of future Integrated Marketing Communications students, faculty, and staff.

Client's Initials: \_\_\_\_\_

*I represent that this submission is my own original work and that my project or research paper does not, to the best of my knowledge, infringe upon anyone's copyright. I also represent and warrant that this submission contains no libelous or other unlawful matter and makes no improper invasion of the privacy of any other person.*

*I understand that, as the author of this work, I retain copyright. I grant to the University of Kansas a limited, non-exclusive license to disseminate my project or research paper through the repository and to migrate my project or research paper (i.e., copy it) for preservation purposes at any time in the future and as many times as necessary.*

*I understand that no changes will be made to the content of my project or research paper, but that slight modifications in format might occur during the process of conversion.*

*I understand that I may revoke this authorization for disclosure or use of my academic creation at any future date by giving written notice to the University of Kansas Libraries that I would like my project or research paper to be removed from KU ScholarWorks. (An archived electronic copy will be kept, but it will not be accessible to anyone but the administrators of KU ScholarWorks.) In addition, if my project or research paper is removed from KU ScholarWorks, I may authorize that a paper and/or electronic copy be kept as designated in the second check box above.*

S. Maddox  
Student's Signature

1/11/16  
Date

\_\_\_\_\_  
Student's Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Student's Signature

\_\_\_\_\_  
Date

*As the Client/Subject, I understand that I may revoke this authorization for disclosure or use of this academic creation at any future date by giving written notice to the University of Kansas Libraries that I would like this project or research paper to be removed from KU ScholarWorks. (An archived electronic copy will be kept, but it will not be accessible to anyone but the administrators of KU ScholarWorks.) In addition, if this project or research paper is removed from KU ScholarWorks, I may authorize that a paper and/or electronic copy be kept as designated in the second check box above.*

\_\_\_\_\_  
Client's Signature

\_\_\_\_\_  
Date



# LITERACY KANSAS CITY

*Where learning to read changes lives*

**PREPARED & PRESENTED BY**

Margaret Hair  
Stephanie Maddox

**MARKETING COMMUNICATIONS CAPSTONE**

The University of Kansas - Edwards Campus  
Overland Park, Kansas

November 16th, 2015

# TABLE OF CONTENTS

<b>Team Profiles</b>	<b>3</b>
<b>Executive Summary</b>	<b>5</b>
<b>Situation Analysis</b>	<b>7</b>
<b>SWOT Analysis</b>	<b>9</b>
<b>Research - Secondary</b>	<b>16</b>
<b>Research - Primary</b>	<b>25</b>
<b>Marketing Communications Plan</b>	<b>45</b>
<b>Timeline</b>	<b>72</b>
<b>Budget</b>	<b>74</b>
<b>Appendices</b>	<b>79</b>



## TEAM PROFILES



### **Margaret Hair**

Margaret Hair is a program coordinator for the Union Programs office of the KU Memorial Unions, a nonprofit affiliate corporation of the University of Kansas. In that role, she oversees and advises programming, content and events for 90.7 KJHK-FM, KU's student-run radio station. She earned a bachelor's degree in news and editorial journalism from the University of North Carolina at Chapel Hill, and worked as a reporter for a Colorado daily newspaper for several years before moving into her current position. Margaret will receive her master's degree in integrated marketing communications from the School of Journalism and Mass Communications at the University of Kansas in December 2015.



### **Stephanie Maddox**

Stephanie Maddox received a bachelor's degree in psychology and sociology from The University of Kansas in Lawrence, Kansas. After graduation, she began work as a communications associate at Jane Mobley Associates, a Kansas City public relations firm. For four years, she led projects noted for research-based strategy, media relations, outreach campaigns, public involvement and special event planning. The firm built a national practice focused on "communication that builds community," specializing in defense, education, health, transportation and water sectors. She also served as a facilitator on topics ranging from emergency and health communication for special needs populations to assisting with multistate transportation operations programs. Stephanie will receive her master's degree in integrated marketing communications from the School of Journalism and Mass Communications at the University of Kansas in December 2015.



### **Kelly Crane, MBA**

This project was supervised by Kelly Crane, education program manager at the William Allen White School of Journalism and Mass Communications, University of Kansas Edwards Campus, where she oversees the recruiting, marketing and management of the integrated marketing communications graduate program. She has 26 years of experience in integrated marketing as a director- or VP-level marketing leader in industries from advertising and entertainment, to healthcare and technology. She also spent some time as a consultant for an agency specializing in helping nonprofits with their direct response fundraising activities. She earned a bachelor's degree in psychology from Baylor University and an MBA from the University of Kansas.





# Executive Summary





# EXECUTIVE SUMMARY

## Executive Summary

Literacy Kansas City has grown its adult literacy services considerably in the past few years. As the organization grows and expands to new areas of service in new areas of the city, Literacy Kansas City must diversify its funding and attract more individual donors.

To help provide research and ideas for that process, this report was prepared by two graduate students in the Integrated Marketing Communications program at the University of Kansas Edwards Campus.

In putting together this plan, our team conducted secondary and primary research. We looked at communications practices from peer organizations suggested by Literacy Kansas City, and researched current trends in nonprofit giving.

For primary research, the team conducted several surveys and interviews, gathering perspective from current Literacy Kansas City donors and board members; Kansas City residents interested in nonprofit giving; and nonprofit fundraising experts.

With those processes in mind, the team developed three research questions. Plans in this report are organized around those questions, which deal with:

- Donor communication
- Donor acquisition and retention
- Telling Literacy Kansas City's story to audiences new and old

In addition to a list of strategies and tactics, this plan includes a timeline for action and a multi-stage budget for execution.

Appendices include experts from primary research interviews, full results from primary research surveys, and samples of best communications practices from peer literacy organizations.





# Situation Analysis



# SITUATION ANALYSIS

## **History:**

Literacy Kansas City has a 30-year history of providing tutoring services and combatting illiteracy in Kansas City.

Originally established as Laubach Literacy Center in 1985, the organization has been incorporated as a 501(c)(3) nonprofit since 1986. Literacy Kansas City provides no-cost, individualized tutoring services to adults in the greater Kansas City area.

## **Services Offered:**

The organization operates four main programs: Ticket to Read, GEARS (Guided Educational Access to Reading Skills), Family Reading Program, and Open Doors.

- Ticket to Read introduces students to digital life skills, as well as reading skills including vocabulary, phonics, writing, critical thinking and comprehension.
- GEARS is a partnership with Metropolitan Community College-Penn Valley that immerses students in a literacy curriculum with a goal of being able to enroll in credit-bearing classes at MCC.
- The Family Reading Program combines an adult literacy program with educational after-school opportunities for children.
- Open Doors is an adult literacy program focused on state offenders.

All four programs are part of Literacy Kansas City's Impact Initiative to combine group instruction with individualized tutoring, launched in January 2015.

Literacy Kansas City also offers or is developing services in reading fundamentals, math instruction, and preparing for high school equivalency.

With a vision of "Literacy for All," and a mission "to advance literacy within the Kansas City region through direct services, advocacy, and collaboration," Literacy Kansas City serves hundreds of students each year.

## **Organization Structure:**

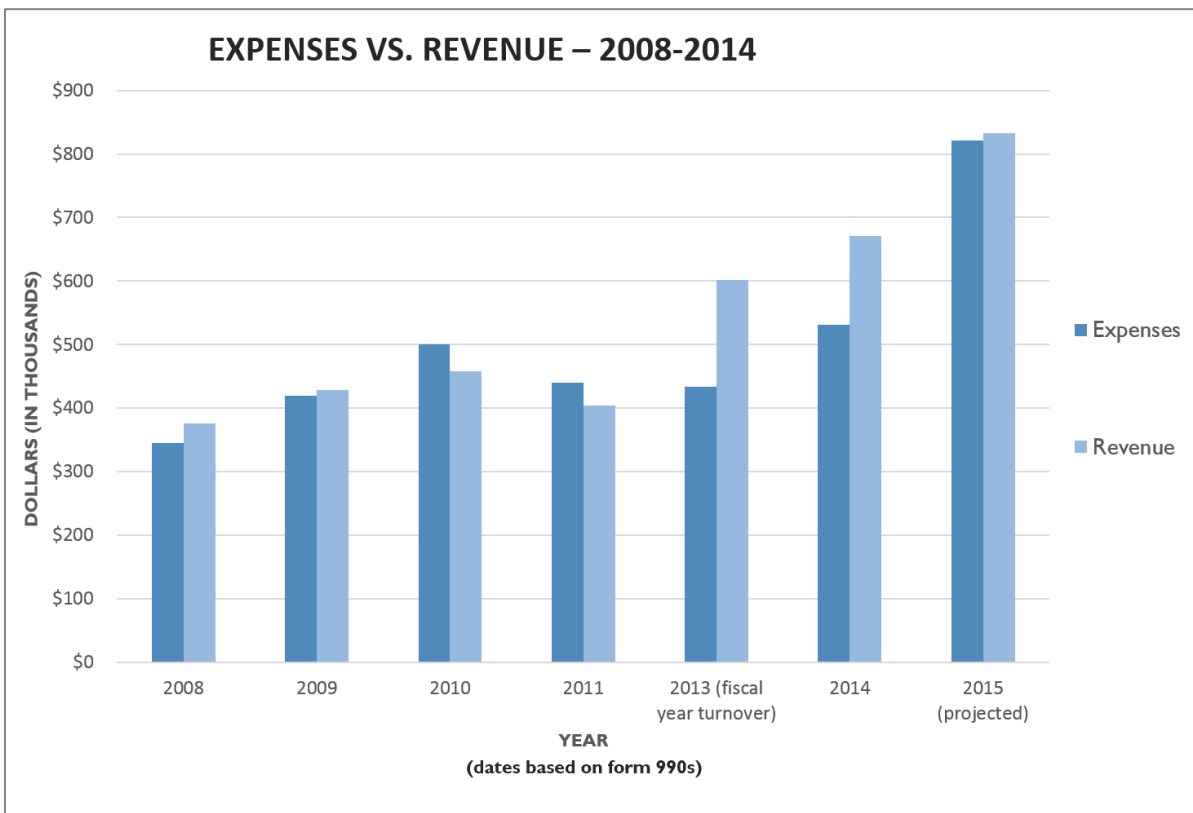
Literacy Kansas City has a full-time staff of 14, with a small part-time staff and a large pool of regular volunteer tutors. The organization is governed by a volunteer, 16-person board of directors, and receives additional guidance and support from several board committees: executive, board development, finance and fund, program, marketing, and advisory council. Board and committee members take on outreach, event planning, and other responsibilities.

## **Organization Challenges:**

As Literacy Kansas City has expanded its programs and services, the organization has increased its operating costs, creating a need for more revenue.

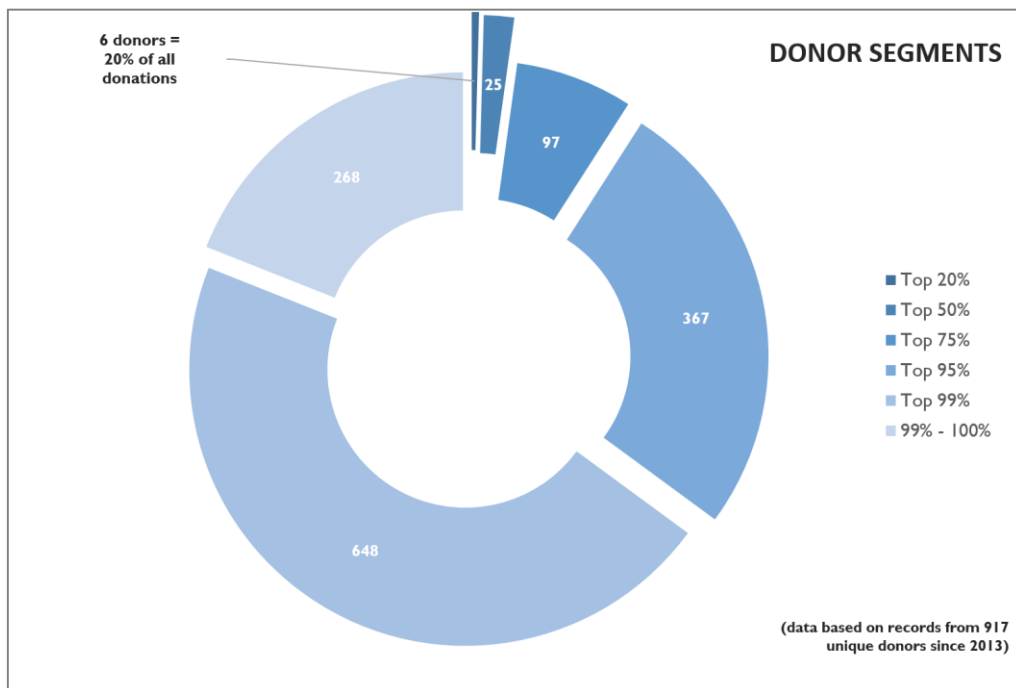
Literacy Kansas City has faced financial challenges through this expansion, as the organization's expenses exceeded its revenues in tax reporting periods from 2010 and 2011. While revenue and expenses have grown significantly in the past five years, the organization has worked to balance its budget, decreasing program expenses from 2011 to 2013 and increasing overall revenue.





### Donor Data Analysis:

Literacy Kansas City maintains a large database of all past donations using SalesForce, a multi-faceted customer relationship management platform. The organization has a “good data date” of Jan. 1, 2013; donations logged prior to that date may not have accurate information for appeals or method of giving.



Looking at data from 2013 forward, there are more than 900 unique donors. Six top givers account for more than 20 percent of all individual donations; the 25 largest donors account for more than 50 percent of all individual contributions. 268 donors represent the final percent of all donations.

Frequency analysis shows nearly all donors in the bottom percentile gave one-time gifts; this section is heavily weighted toward one-time event

attendance. Many of the largest donors have given on multiple occasions over several years.

Using an analysis of frequency, recency and monetary value of individual donations allows Literacy Kansas City to identify top givers and create donor segments.



## **Environment: Trends**

### **Literacy Rates**

Literacy Kansas City reports nearly 225,000 adults living in the Kansas City area are functionally illiterate.

The national nonprofit organization ProLiteracy tracks correlation between adult literacy rates and economic success. According to a ProLiteracy report, 29 percent of U.S. adults 16 or older read at or below an eighth-grade level; 14 percent read at or below a fifth-grade level. Of adults with the lowest literacy, 43% are living in poverty (ProLiteracy, 2015). A 1 percent increase in the average literacy level leads to a 1.5 percent in gross domestic product, according to ProLiteracy. The organization reports low literacy rates to be linked to poor health and inequality in socioeconomic status.

The United States ranked 17<sup>th</sup> in a survey of adult literacy rates conducted by the National Center for Education Statistics, scoring lower than the international average (National Center for Education Statistics, 2015).

### **Literacy Initiatives**

There are several programs in Kansas City working to improve literacy rates.

Mayor Sly James helped introduce the childhood literacy program Turn the Page KC, which aims to help school children read at grade level (Turn the Page KC, 2015). The United Way of Greater Kansas City also supports an initiative focused on improving childhood literacy rates (United Way of Greater Kansas City, 2015). Projects such as Dolly Parton's Imagination Library, Born Learning KC and Success by 6 work to ensure every young child has access to books and learning resources.

On the national scale, the Library of Congress's long-running Center for the Book program has affiliates in every state advocating for literacy, reading and libraries (Library of Congress, 2015).

## **Environment: Market Analysis**

### **The Giving Climate**

Kansas City area residents who already give to nonprofits are Literacy Kansas City's audience for potential donors.

According to data from the National Center for Charitable Statistics, about 40 percent of the 886,700 surveyed by NCCS itemized deductions in a reporting period covering 2005 to 2009, and about 84 percent of households reported some type of charitable contribution, resulting in a giving total for the Kansas City metro area of about \$1.18 billion (National Center for Charitable Statistics, 2015). In the education sector, 437 nonprofits filed budget information, reporting more than \$142 million in private donations and government grants.

Nationally, the climate for nonprofit giving is as favorable now as it was before the late-2000s economic recession, according to the 2014 U.S. giving report from Giving USA (Giving USA, 2015). Americans gave \$358.38 billion to charitable organizations in 2014, according to the report, surpassing a previous record year in 2007. Individual donors accounted for 72 percent of total giving. Giving increases as economic indicators improve and people have more disposable income, according to the Giving USA report. Religion was the largest sector for gifts, followed by education.



## **Environment: Competition Analysis**

For recruiting new students, Literacy Kansas City does not have any director competitors providing no-cost reading, writing, and computer literacy skills to adults.

In the area of adult literacy, services in Kansas City include English as a Second Language and high school-equivalency preparation classes from Kansas City Public Schools and North Kansas City Public Schools and resource lists from Mid-Continent Public Library.

Literacy Kansas City competes with local nonprofits for volunteers, and is up against local, regional, national and international nonprofits when it comes to donors. Kansas City is home to about 2,450 nonprofit organizations with annual revenues of more than \$25,000, according to the Midwest Center for Nonprofit Leadership's 2015 "at a glance" report on the nonprofit sector (Midwest Center for Nonprofit Leadership, 2015). About 16 percent of area nonprofits are focused on education; those groups bring in 11 percent of all nonprofit revenue. Health is the highest-earning sector.



## **Why it is Necessary to Take Action at this Time**

Literacy Kansas City has grown its program offerings and annual revenue significantly and rapidly the past two years. To be able to continue offering its services at the current level and to continue growing, Literacy Kansas City must stabilize its individual and corporate giving to support its grant-funded programs.

Individual donations account for approximately 22.7 percent of Literacy Kansas City's projected revenues for the 2015-16 fiscal year; grants account for approximately 42 percent, according to budgets shared with the IMC team. Proceeds from fundraising events account for the majority of the remaining revenue. In order to build reserves and increase unrestricted funding, Literacy Kansas City must actively pursue a wide base of consistent individual donors at all levels.

## **Goals and Literacy Kansas City Strategic Plans**

Literacy Kansas City has developed strategic plans for the overall organization, as well as its database and fund development activities. These plans outline a path toward increased organizational effectiveness, awareness, and financial stability.

Specific to donor communications, the fund development plan address marketing and communications, individual giving, institutional partners and funders, special events, and the board's fund development committee. Themes emerging from the fund development plan include:

- **Branding and Messaging:** The plan calls for a professional re-branding of the organization and an overhaul of marketing materials and messaging.
- **Individual Giving:** Major gifts and top prospective donors are the focus, but all levels of individual giving are mentioned.
- **Supporter Cultivation:** In addition to pursuing potential large donors, the plan outlines strategies for connection event attendees to volunteers to donors.



# RESEARCH QUESTIONS

## **Research Questions:**

Based on conversations with Literacy Kansas City staff, review of the organization's strategic plans, and preliminary secondary research, the IMC project team developed three research questions to guide further research:

1. How can Literacy Kansas City communicate with current and prospective donors to help move people to higher levels giving and/or engagement?
2. How can Literacy Kansas City position itself when compared to other local, regional and national nonprofits as a valuable, rewarding and impactful option for donors?
3. How can Literacy Kansas City use the stories of their clients, volunteers and supporters to inspire donors and financial supporters?

Recommendations, tactics and measurement for Literacy Kansas City's donor communications are organized around these research questions in the second half of this report.







# SWOT ANALYSIS

## STRENGTHS:

- Strong commitment to Literacy Kansas City's mission and values.
- Coordinated events and fundraisers.
- Strong engagement with group of core donors who are committed and loyal.
- High end-of-year percentage response to help with costs.
- Charismatic and passionate employees who share a love of reading.

## WEAKNESSES:

- Communications calendar and plans among staff needs to stay as up-to-date as possible.
- The need for high-quality photographs of staff, volunteers, students and events.
- There are not enough student stories, we need to request them and keep building personal testimonials of student journeys with Literacy Kansas City.
- Need more creativity in regards to events, fundraising and local awareness.
- Lack of understanding when it comes to certain donors motivations. Need to nurture these relationships to develop more impressions about individuals.
- Very little personalized touch in donor communications.

## OPPORTUNITIES:

- Connection with the Mayor and United Way's Literacy initiatives.
- Strong partners with constituents who could become future donors.
- Opportunity to host smaller group events.
- The ability to collaborate with partners to increase visibility and achieve special honors.
- Exclusive events to cultivate higher-level donors.
- New outlets such as social media to distribute information to the public.

## THREATS:

- Competition from other literacy organizations.
- Insufficient cultivation of new "next generation" donor-base.
- Donor saturation and overstimulation in regards to requesting donations, time and advocacy.
- The lack of progress measures of donations.
- Programs and staffing are in flux.





# Research



# SECONDARY RESEARCH

## SECONDARY RESEARCH

### **Purpose and Method**

To understand how similar organizations reach out to donors, the project team researched peer organizations in adult literacy. Literacy Kansas City supplied an initial list of organizations with active websites and Facebook pages.

The team looked to business publications, marketing research reports, and news media for information about giving patterns, the state of nonprofit giving, and giving habits of Millennials.

Best practices in donor communications are described and supported by research and examples from peer organizations.

Sources for secondary research are available in Appendix C.



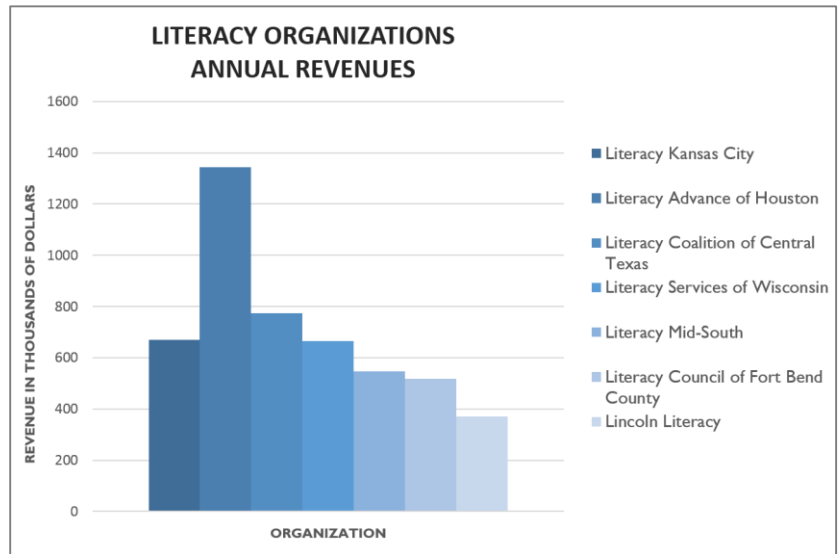
## SECONDARY RESEARCH

### Analysis of Peer Organizations

At the request of Literacy Kansas City, our team researched peer organizations across the country working to improve adult literacy. Examples of successful practices for events, recognition, ways to donate, gaining and attracting donors, and other topics of interest are outlined in this section.

### Organizations Researched

- Literacy Advance of Houston
- Literacy Services of Wisconsin
- Literacy Mid-South
- Literacy Quebec
- Lincoln Literacy
- Literacy Council of Fort Bend County
- Nashville Adult Literacy Council
- Literacy Instruction for Texas
- Literacy Center
- Literacy Coalition of Central Texas
- National Center for Families Learning



Organizations varied in size, annual revenue, and number of social media followers.

Literacy Kansas City's annual revenues from the last full reporting year on a similar scale to other organizations from mid-size metro areas.

Several larger literacy organizations have a full-time staff of a similar size to Literacy Kansas City. Some organizations have a dedicated marketing professional, though that position might be paired with development or information systems.

### Key Findings

#### Events

- At Literacy Services of Wisconsin events, all guests wear customized ribbons attached on their name badges. The ribbons state who they are – such as a sponsor, director, tutor of inspiration, gold sponsor, or a board member.
- They have events where they honor students and tutors. They are awarded plaques and are referred to in words such as “student of inspiration,” “GED student of inspiration,” and “EEL (English Language Learning) student of inspiration.” It appears via their Facebook page that these selected individuals give speeches when receiving their awards on stage.
- Literacy Advance of Houston event examples include The Life Without Literacy luncheon, Open Houses, Whole Foods 5% Giving Day, Scrabble in the City, The Reader Cup, Literacy Day at the Ballpark, Drink For Literacy, Volunteer Socials, and Family Literacy Nights. The events all seem to be very boisterous and

**DONATE for DOUGHNUTS**  
and much more!

DONATE NEW AND GENTLY USED BOOKS TO THE  
LITERACY SERVICES

# BOOK DRIVE

Join Cranky's in supporting the adult education programs at Literacy Services  
For each book donated between Sept. 30th - Oct. 3rd  
receive an entry into a drawing for:  
First place - Pizza Dinner, Second Place - Dozen Doughnuts,  
Third Place - Coffee and a Doughnut.

Please DO NOT DONATE:  
Magazines, Encyclopedias, Old Library Books, Reader's Digest Condensed Books

Literacy Services of Wisconsin – Event Flier



have a lot of attendees who all seem to be enjoying the relaxed atmosphere.

- Literacy Mid-South Events include The Spirit of Giving Awards, #ReadMemphis (where they take a large banner around town to encourage people to use this hashtag on Twitter or Facebook and share with the public what they are currently reading), News Coverage on Good Morning Memphis with the Executive Director of LMS to promote Read Across America month, "Chat Choose Teach" where volunteer tutors attend a "speed-dating" type session at a local restaurant and switch partners every ten minutes to teach one another about the tutoring strategies that work best for them, Literatini (cocktails at a local bookstore), Book Club Kick-Off, Books for Brains Trivia, Super Gala costume party, Mid-South Writers Conference, and One Club Challenge Golf Tournament.
- Literacy Quebec employees attended the World Assembly on Adult Education (WAAM). Other events include keynote presentations and designing a float for the St. Patrick's Day Parade.
- Lincoln Literacy Milestones: Online Volunteer Training, Rebranded as "Lincoln Literacy" in 2011, Health and Family Literacy Programs launched, Innovation Award, Literacy Hotline, and "Go Big Read" Charity Run.
- Lincoln Literacy's Reading Rainbow fundraiser with the show's creator in attendance, Great Nebraska Read-a-Thon with news coverage, ceremonial big check photo-ops with sponsors.
- Literacy Council of Fort Bend County events featured on their Calendar section of Facebook include Bike the Bend for Literacy, Grown-Up Spelling Bee, Reading Between the Vines, Summer Book Sale, and Lemonade for Literacy.

## Recognition

- Literacy Advance of Houston takes photos and makes Facebook posts featuring the Volunteer and Learner of the Year. These people are seen holding awards. Many posts feature volunteers and students enjoying nightlife in Houston together. Other posts will feature a new staff member, welcoming the individual to the organization. They also do the same for their students, when they pass certain milestones. A photo with a name is always included and a brief paragraph description details what the student has now achieved.
- Lincoln Literacy has a video of Executive Director on the local news promoting the #givetolincoln initiative – totals reached almost \$3 million mark incorporating this Twitter hashtag.

## Ways to Donate

- Donation button can be very prominently featured on their Facebook pages.
- Literacy Services of Wisconsin use Square as a way of collecting donations at any location, at any time. It is a small, cheap device, which can turn a smartphone or tablet into a complete point of sale. It takes care of payments, processing, analytics and more. Let's you gain real-time insights even at events. The cost of using Square is only \$29 and makes electronic donations easier than ever. Additional information is available in Appendix D.
- 50<sup>th</sup> Anniversary Book – includes the story of the LSW organization and stories of tutors and students. Was mass-produced and they had a huge event to celebrate the book being published. All proceeds went to benefit the organization and you can purchase it online as well.
- Literacy Mid-South has activated Facebook's online donation function, which is thoroughly explained so user can easily donate through this Facebook page.



Literacy Services of Wisconsin – 50<sup>th</sup> Anniversary Book



- Comical literary related t-shirts are available every once in a while with a photo of an employee at LMS wearing the shirt with a link in order to purchase. (Oscar Wilde quote, Mark Twain quote, BookNerd, etc)
- Become a LIFT'er for Literacy Instruction for Texas and buy a membership which includes:
  - Exclusive invitations to interactive education discussions with experts in the fields of education, brain health and cognitive development
  - Special recognition at Toast to Literacy, LIFT's annual gala held in September
  - Special recognition on LIFT's website
  - Meaningful volunteer opportunities
  - Invitation to two annual LIFT'ers events
  - 100% of the annual membership dues support LIFT student scholarships, curriculum and LIFT's Little Free Library program.
  - Pricing: Individual (\$100), Couple (\$175), Family (\$250) – all annual.
  - Lifetime Membership: (\$1,000) one-time only fee.
- Online investing at The Literacy Center in Omaha:
  - By clicking on the hard to find "Donate Now" button, it lays out options for potential donors.
  - You can choose to make this a one-time donation or a recurring donation that is automatically withdrawn.
  - Donations are shown from \$20 for supplies for a classroom, \$300 to cover the cost for classroom books for one adult, \$800 provides two weeks of classroom instruction and a \$2500 donation will get an adult through the entire GED program.
- The National Center for Families Learning has a very current and engaging website, with objects that are very interactive as you move your cursor around. NCFL's donation page is one of the best. They make it very simple to donate and looks very legitimate. They ask to please consider becoming a reoccurring donor. By clicking a box, you can dedicate your donation in someone's name.

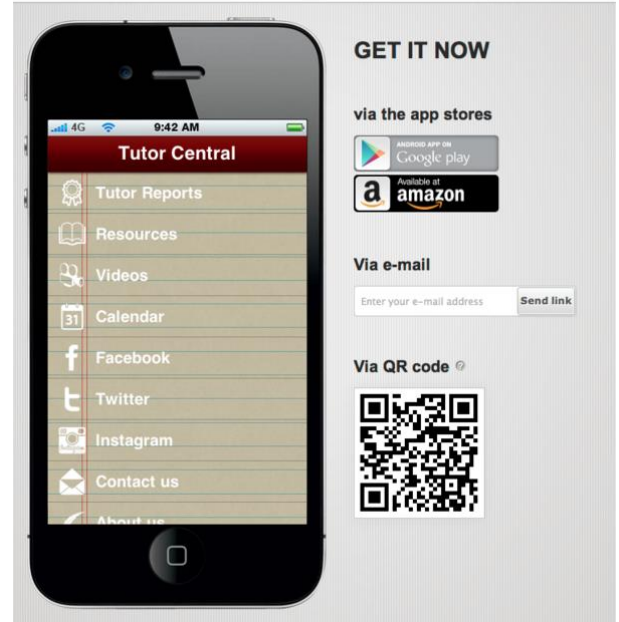
## Gaining and Interacting with Donors

- Literacy Services of Wisconsin incorporates a great use of photography and language in their constant Facebook interaction. They use the Facebook and Twitter lingo such as "#tbt" on Thursdays and attach pictures showing what LSW looked like 50 years ago. They try to tag their students individually on Facebook when they can, and engage in important dialogue with them.
- Events for the Literacy Advance in Houston are promoted on social media, although it doesn't appear that many people click that they are actually attending these events on the calendar.
- Lincoln Literacy use a lot of their Facebook updates to thank their sponsors for donations.
- Lincoln Literacy get people who have donated to this organization to hold up a printed off template that says, "I donated to Lincoln Literacy because..." and fill in the reason. These photos are posted as Facebook updates. Good way to honor individual donors.
- The Literacy Coalition of Central Texas seems uninspired but once you download the feature impact reports, newsletters and information on fund development it's obvious that a lot of work has gone into making these cohesive as far as brand and vision. The information on fund development is very in-depth and the charts are helpful for those who would be donating to this organization. The appearance from the reports is that they are only spending 4% on fundraising and 14% on administration – the rest goes directly towards the programs.
- Nashville Adult Literacy Council has a live Twitter feed that is updated on the main website page, along with the scanned invitations to several upcoming events. There is also a small area where people within the organization are featured and tell personal stories. The donation button is prominently featured on every page and is always the first thing your eye is drawn toward.



## Others Topics of Interest

- Literacy Mid-South (LMS) is in the midst of an organizational renewal, one that is resulting in stronger engagement of learners and volunteers, more effective organizational partnerships, and new program models that put the learners first and, at the same time, achieves measurable results that have big impacts on our community's socio-economic well-being.
- Literacy Mid-South was the first adult education program in the nation to offer a mobile app for their volunteers. Section tabs in the app include Tutor Reports, Resources, Videos, Calendar, Facebook, Twitter, Instagram, Contact and About Us and help to keep the volunteers organized when they are assisting.
- Lincoln Literacy mentions that childcare and transportation are provided. Vans have the Lincoln Literacy logo on the sides of them and photos are proudly displayed on their Facebook page.
- When anyone donates on "Lincoln Day" the Lincoln Literacy board matches all donations.
- The Nashville Adult Literacy Council has received eight national and two regional awards for outstanding program, staff dedication, and student achievement. These awards include having been selected as a model of best practices for dealing with a waiting list, the Salute to Excellence award for Innovation in Action, and the Mary Catherine Strobel award for volunteerism.
- Literacy Instruction for Texas website is clear, concise and visually appealing. They've incorporated their blog very well into the bottom portion of their webpage. Very compelling graphs that you are led to by clicking on a large "Bend the Trend" slogan – showing that they want to stop the illiteracy trend in Texas.
- Literacy Instruction for Texas includes a Financial Responsibility section on their website that allows individuals to view their financial and tax documents.



*Literacy Mid-South – Mobile App*





## SECONDARY RESEARCH

### **Nonprofit Giving**

Literacy Kansas City operates in a busy nonprofit landscape in the greater Kansas City area. More than 7,500 nonprofit organizations are registered in the area, with a total annual revenue of \$13.7 billion, according to the Midwest Center for Nonprofit Leadership's 2015 Kansas City Nonprofit Sector at a Glance Report (Midwest Center for Nonprofit Leadership - Henry W. Bloch School of Management, 2015).

Because many of Literacy Kansas City's donors don't benefit directly from the organization's services, communicating the impact of those services is vital for attracting and retaining supporters.

### **Charitable Giving Increasing, Online Giving Becoming More Popular**

Online giving is an increasingly important piece of nonprofit revenue streams. A 2015 report by nonprofit technology provider Blackbaud shows an increase in online giving in 2014 over 2013 (MacLaughlin & Cohen, 2015). Smaller organizations increased online giving at a quicker pace in larger nonprofits; online giving for smaller organizations was up 10.6 percent in 2014 over 2013. The acceleration in online donations is a continuation of a trend from the previous year. 2013 saw overall online giving increase by 13.5 percent over 2012. As they increase, online donations remain a relatively small portion of nonprofits' revenue stream - in 2014, online donations accounted for just 6.7 percent of total revenue.

The report used data from almost 4,800 nonprofits and analyzed more than \$16 billion in gifts from 2014. Blackbaud's data showed an increase in overall giving of 2.1 percent in 2014, with organizations with annual revenues of less than \$1 million displaying more significant growth than medium or large organizations.

In a report on donations to grantmaking foundations and endowments, IBISWorld forecasts giving from businesses and individuals will continue to increase in the next five years, as the economy continues to stabilize and rebound (Hoopes, 2015). As giving increases, IBISWorld predicts funding organizations and donors will favor education and health-focused projects. This may benefit Literacy Kansas City, as projects focused on education have the potential to positively impact the economy.

Using data from Giving USA, a 2014 report from the Fundraising Effectiveness Project estimates that nonprofits on average increase their annual giving by 7.6 percent each year, effectively doubling their annual giving every 9 or 10 years (Fundraising Effectiveness Project, 2014). Literacy Kansas City's overall revenues have increased at much faster than average rate in the past three years. Focusing on donor communication and retention may allow the organization to continue growing revenues at a sustainable rate.

### **Online Communication is Increasing**

Websites, email marketing and traditional social media are the most important communications channels for nonprofits, according to a survey of more than 1,500 organizations by NonprofitMarketingGuide.com (NonprofitMarketingGuide.com, 2015). Paid advertising was among the least important channels, with less than one percent of nonprofit communicators listed paid ads as their most important outlet. Facebook was by far the most important social media channel, according to the survey.

Email marketing strategies leaned toward frequent communication. More nonprofits planned to send some kind of email appeal at least monthly -- that statistic was 45 percent in 2015, up from 33 percent in



2014. Email newsletters are a popular form of online communication; about 65 percent of survey respondents said they would send an email newsletter at least weekly in 2015.

Direct mail continues to be important for giving campaigns; 31 percent of organizations planned to send a direct mail appeal twice a year, followed by quarterly (27 percent) and annual (14 percent) appeals. Asking for donations and encouraging event registration were the most popular calls to action in email and direct mail.

A 2013 survey by Google reinforces the importance of online communication (Schwartz, 2013). Video was the most powerful form of online communication for survey respondents, with 79 percent reporting that watching a video made the biggest impact.

Donors in the Google survey started searching for information about nonprofits in September, suggesting that year-end appeals could be done earlier, or online communication could be done more frequently.

Donors are increasingly consuming information from nonprofits on mobile devices. According to a 2014 report on technology in the nonprofit sector, about half of all emails are read on mobile devices (Westmoreland, 2014). If those emails contain a hyperlinked call to action, it's essential that link lead to a mobile-friendly website.

## **Content is Key**

Creating shareable, impactful and high-quality content is key to building relationships with donors throughout the year. Nonprofits have an opportunity to share success stories, reinforce their mission, and galvanize supporters with frequent use of videos, photos and articles.

An October 2014 report from Grassroots Fundraising Journal suggests engaging all staff and board members in creating content to ensure a regular stream of new stories (Ong, 2014). The report recommends setting up a content calendar, and using a regular communication piece, such as a monthly e-newsletter, as a hub for new content that can be shared through social media or included in print appeals.

Content that clearly communicates an organization's impact and message is particularly important for attracting new donors, according to an analysis by high-net-worth donors by Root Cause (Wolk, Stanzler, Radday, & Nabi, 2015). Knowledge of an organization was the top motivator for giving to new organizations for donors who give regularly throughout the year, according to the Root Cause survey.

Information about the impact the nonprofit makes was the most popular type of content for donors, with 75 percent of survey respondents prioritizing content about impact. Specific examples about impact were more popular than more abstract information, such as examples of projects funded or a description of the population served. For general information about an organization, one-page fact sheets posted directly to the organization's website were the preferred format.

In a 2014 content marketing report, nonprofit software provider Blackbaud reported that while 92 percent of nonprofits surveyed used content marketing, only 25 percent operated under a content marketing strategy (Blackbaud, 2014). Marketers perceived sharing content at events, in e-newsletters, on social media and in print newsletters to be the most effective. Lack of time and budget were the biggest barriers



to content marketing. Increased fundraising, brand awareness and brand loyalty were the biggest motivators.

### **Nonprofits Must Tell Stories**

Effective storytelling helps donors see change. People are wired through nature and nurture to react emotionally to powerful stories, according to a guide on nonprofit storytelling from Pursuant, a fundraising services provider and consulting company (Segovia & Berlund, 2015).

The most emotionally impactful stories introduce an individual character, present a challenge, chronicle the character's struggle, introduce a service to help with that struggle, show a turnaround point, and conclude with a positive outcome, according to Pursuant. Nonprofits use this narrative to show how their programs benefit those served.

Tips for nonprofit storytelling include focusing on narratives that are transformative, authentic, detailed, and moving.

### **Millennials Want to Be Engaged**

Millennials are interested in being actively engaged in their giving, and are more interested in opportunities that involve volunteering or activism, according to a February 2015 report from the marketing research firm Mintel (Bonetto, 2015). The report suggested that older Millennials might respond well to programs that offer a chance to give back with a smaller time commitment, such as giving change from a purchase to a specific cause. This age group also expect transparency in a big way, according to the report.

Millennials age 21-38 account for 24.6 percent of the US population, and are the largest generation segment. Older millennials earn wages approximately equal to the average for all working adults, with a median of about \$52,000 annually, according to the Mintel survey.

While the age group doesn't yet account for a large piece of the giving pie -- a Blackbaud study estimated about 11 percent of all nonprofit giving comes from Millennials -- the 21-38 age set represents a large pool of future donors. Nonprofits have worked to engage this group by starting young professionals supporter clubs, reaching out through social media campaigns, and planning interactive events, according to an October 2015 analysis of Millennial giving from the Boston Globe (Schorr, 2015).

According to the Case Foundation's 2015 Millennial Impact Report, 84 percent of millennials surveyed reported making a charitable donation in the past year (Case, 2015). Participation can be driven by peers. For example, the Impact Report found that millennial workers were 46 percent more likely to donate to a cause if their co-workers were donating and asked them to join. Literacy Kansas City may be able to access this trend by building a base of younger donors who can spread the organization's message to their peers.

### **Monthly Giving is Growing**

Recurring donations have been on the rise across all nonprofit sectors, according to a 2013 online marketing benchmark study by Blackbaud (McCarthy; Offutt; Shoaff; Snyder; 2013). Sustaining donations overall increased by 27 percent from 2011 to 2012. Gradually increasing the amount of a sustaining donation is a challenge for nonprofits, but yields returns in predictable revenue.



## **Donor Retention is a Challenge**

Retaining donors is a challenge for nonprofits nationwide (Fundraising Effectiveness Project, 2014). In a survey of more than 3,500 organizations and their fundraising results from 2012-2013, the Fundraising Effectiveness Project found the largest decreases in donor numbers came from organizations with lower total giving.

Survey respondents attributed lower donor numbers to new donors who had lapsed in their giving. The median donor retention rate of organizations surveyed was 43 percent; while that percentage is better than reported in 2013, that metric has averaged below 50 percent every year for the past nine years, according to the 2014 report.

The Fundraising Effectiveness Project report recommends nonprofits make moves to retain existing donors instead of putting effort into acquiring new donors, noting that, "Usually it costs less to retain and motivate an existing donor than to attract a new one."



# PRIMARY RESEARCH

## PRIMARY RESEARCH

### **Purpose**

In an effort to better understand how Literacy Kansas City's current, past and potential supporters perceive the organization's donor programs and donor communication, the IMC project team carried out a multi-pronged research approach including online surveys and in-depth interviews.

### **Method**

The project team conducted a survey of Literacy Kansas City's donors, reaching out to current and past supporters and event attendees. Through different surveys sent out to two sections of Literacy Kansas City's email list, the team gathered information about how donors prefer to communicate, how they perceive Literacy Kansas City's communications, and why they support the organization. Splitting the list of potential respondents into two groups kept each survey under 12 questions.

To gain deeper insight into how and why the organization's biggest supporters give, the team requested responses to a longer version of the donor survey from Literacy Kansas City board and committee members.

To find out how Kansas City area residents perceive Literacy Kansas City compared to other area nonprofits and what motivates a broader population to give, the team used email and social media to distribute an online survey on perceptions of nonprofit giving to personal and professional contacts, local marketing and nonprofit groups, and other networks.

To learn about best practices in nonprofit marketing and fundraising, database marketing and pursuing major donors, the team conducted phone and in-person interviews with industry experts in those areas.

Finally, to better understand what loyal Literacy Kansas City donors value about the organization and how they prefer to communicate, the team conducted in-depth phone interviews with two frequent and long-time donors.



# PRIMARY RESEARCH

## Literacy Kansas City Donor Survey - Short Form

(For a complete copy of the survey and survey responses, see Appendix E)

The IMC team conducted a survey of current and past Literacy Kansas City donors from Oct. 19 through Oct. 31, 2015.

To keep the length of the survey shorter, the team split questions into two groups. Literacy Kansas City sent one survey link out to one half of the organization's donor email list, and the second survey link out to the other half of the donor email list. A total of 69 people took the surveys through Survey Monkey, with 42 respondents in Group 1 and 27 respondents in Group 2.

Each survey included two introductory questions about the respondent's recent involvement with Literacy Kansas City, two questions about communications preferences, and three demographic questions. Both groups were asked to state why they are motivated to support Literacy Kansas City.

Additional questions in the Group 1 survey focused on two areas:

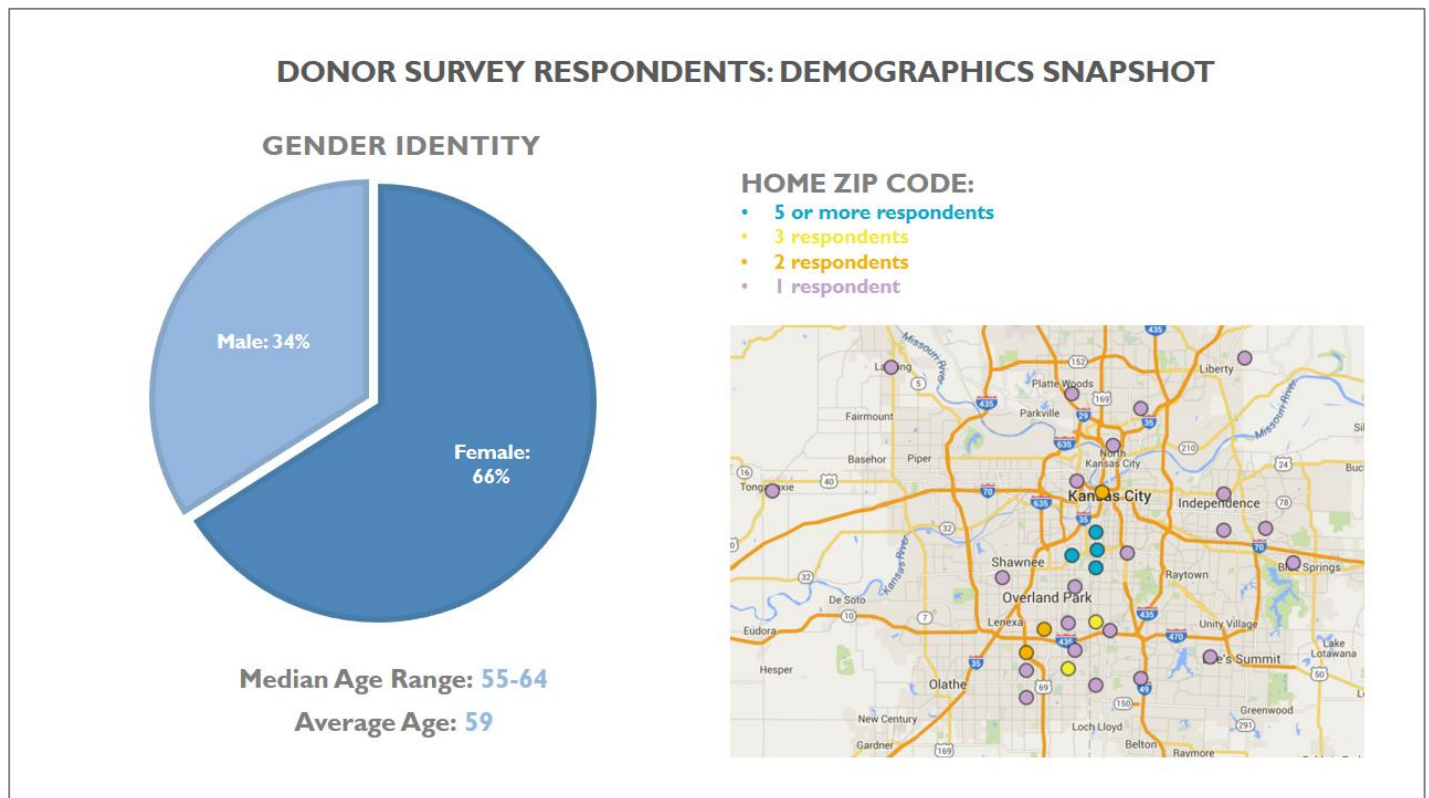
1. The donor's relationship with Literacy Kansas City
2. The donor's impression of Literacy Kansas City's donor communications

Additional questions in the Group 2 survey focused on two areas:

1. The donor's knowledge of Literacy Kansas City's mission
2. The donor's knowledge of Literacy Kansas City's services

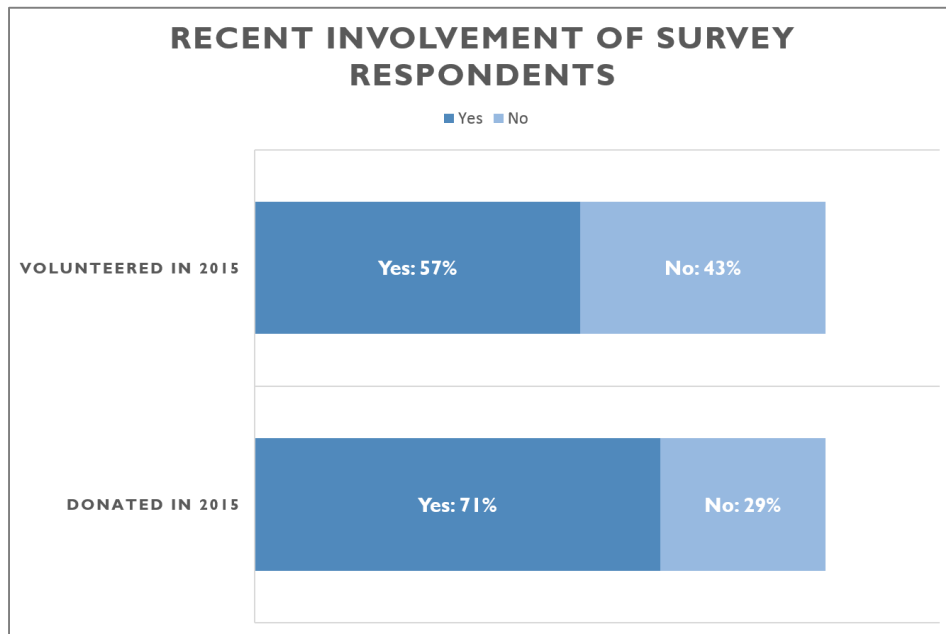
## Survey Respondents

Respondents were varied in their gender, age and location.



## Recent Involvement of Survey Respondents

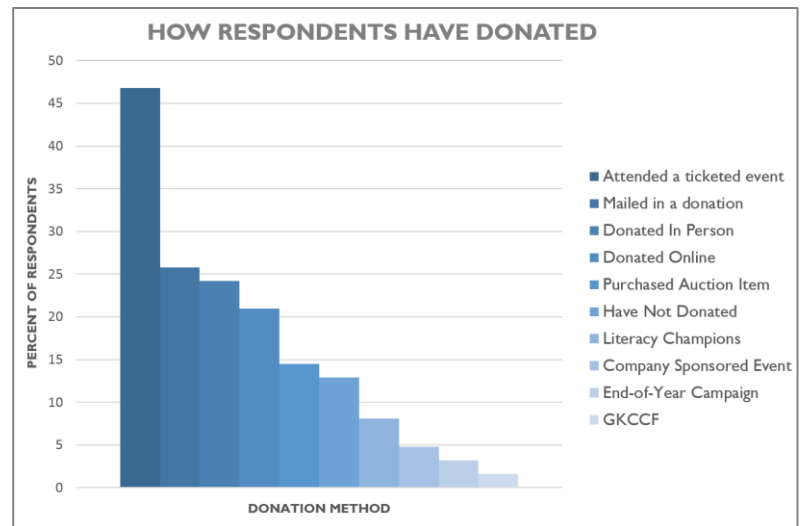
A majority of respondents indicated recent involvement with Literacy Kansas City, having donated or volunteered during the 2015 calendar year.



## How Respondents Have Donated

Attending a ticketed event was the most common choice for how survey respondents had donated to Literacy Kansas City. In-person donations at events were the second most common method of donating. This pool of donors and supporters favored mailing in donations slightly above donating online.

Respondents were able to check all options that applied to them. Several respondents selected multiple options. For example, several respondents had both attended an event and purchased an auction item; attended an event and sponsored an event through their company; or mailed in a donation and donated in-person.



Donation preferences may be influenced by the demographics of the survey respondents. This survey was conducted by email, which may influence the number of online donations from respondents.



## What Motivates Them

All respondents were asked to explain what motivates them to support Literacy Kansas City in their own words. Themes in those responses included wanting to share a love of reading, wanting to help others acquire a beneficial life skill, and sharing the vision of the organization. Some respondents indicated having benefited from the services Literacy Kansas City offers.

“The students are brave, determined, and purposeful. Great folks!”

“An opportunity to make a significant change and positive change in the life of another person. A change that will benefit the individual and his/her family for a lifetime.”

“It only takes one person to make a huge difference in the reading habits of another.”

“Literacy is a major part of the foundation for a successful life in our economy. I want to support an organization that helps adults in our community acquire that skill.”

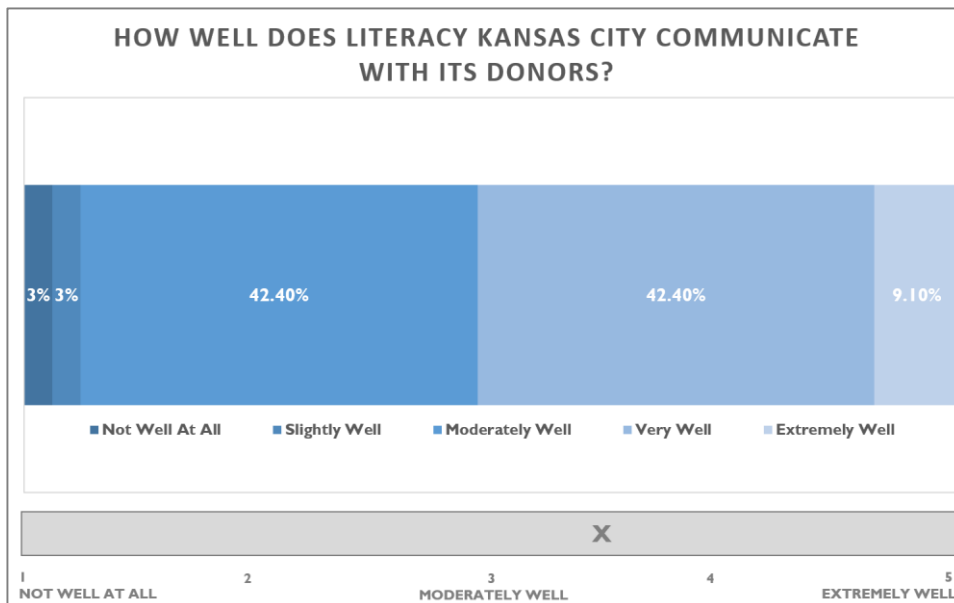
“Reading is an essential life skill for everyone. I appreciate the opportunity to help others enhance their lives with new knowledge and skills.”

“Seeing the change education can make in a life.”

## Key Findings

### Perception of Donor Communications

Survey respondents were generally satisfied with the level of communication they receive from Literacy Kansas City.



Respondents were asked to rate how well they believe Literacy Kansas City communicates with donors on a five-point Likert scale, ranging from “extremely well” to “not well at all.”

The IMC project team assigned point values to each response; “extremely well” was assigned 5, “very well” was assigned 4, on down to 1 for “not well at all.”

The average rating from 33 respondents was 3.5.

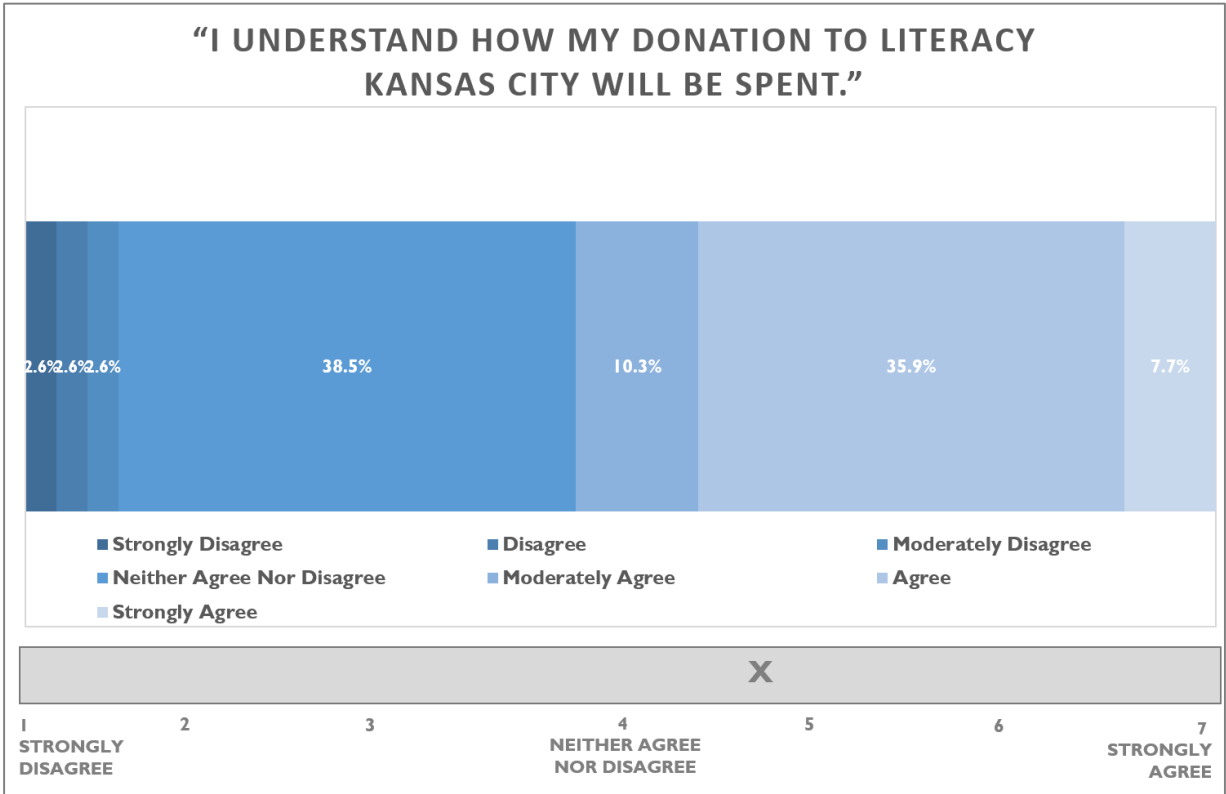
While open-ended responses were limited, those who did comment noted timeliness of communications and recognition for donations.





## Perception of Donor Impact

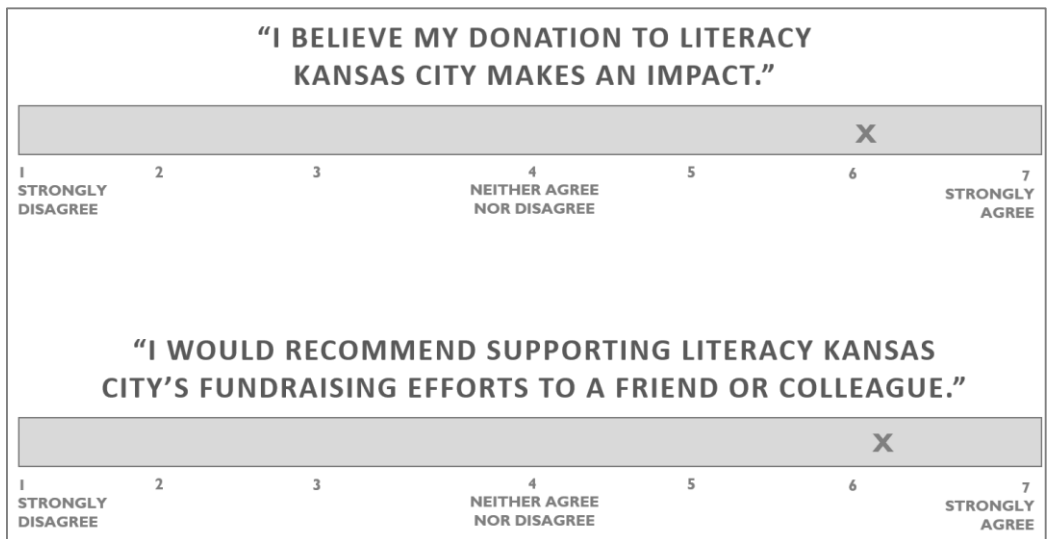
Survey respondents believe their donation to Literacy Kansas City makes an impact, and a strong majority would recommend donating to Literacy Kansas City to a friend or colleague. While responses indicated donor loyalty is strong, there appears to be some lack of awareness on how donations will be spent.



Asked how much they agree that donations to Literacy Kansas City make an impact on a scale from 1 to 7, the average rating from 40 respondents was 6.2.

Asked how much they agree that they would recommend donating to Literacy Kansas City to a friend or colleague, the average rating from 39 respondents was 6.1.

Asked to rate how much they agreed with the statement, “I understand how my donation to Literacy Kansas City will be spent,” the average rating from 39 respondents was 4.9.

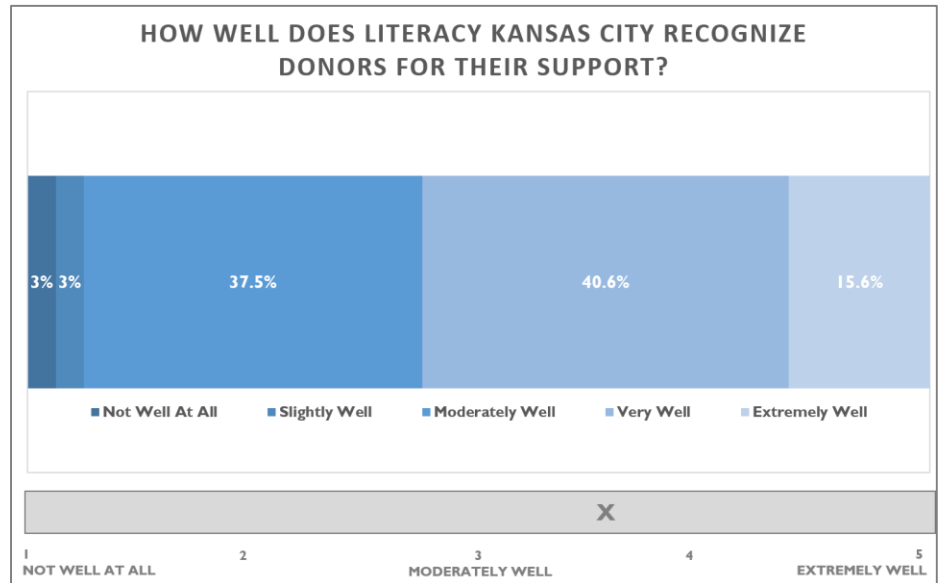


## Perception of Donor Recognition

Survey respondents believe Literacy Kansas City does a satisfactory job of recognizing donors, though the results show room for improvement. A majority of respondents said Literacy Kansas City was doing “extremely well” or “very well” with donor recognition.

Asked to give a rating of the question, “How well does Literacy Kansas City recognize donors for their support?” the average rating from 32 respondents was 3.6 on a five-point scale.

Two open-ended responses suggested donor recognition was not a concern. One comment suggested sending written notes of recognition to donors.

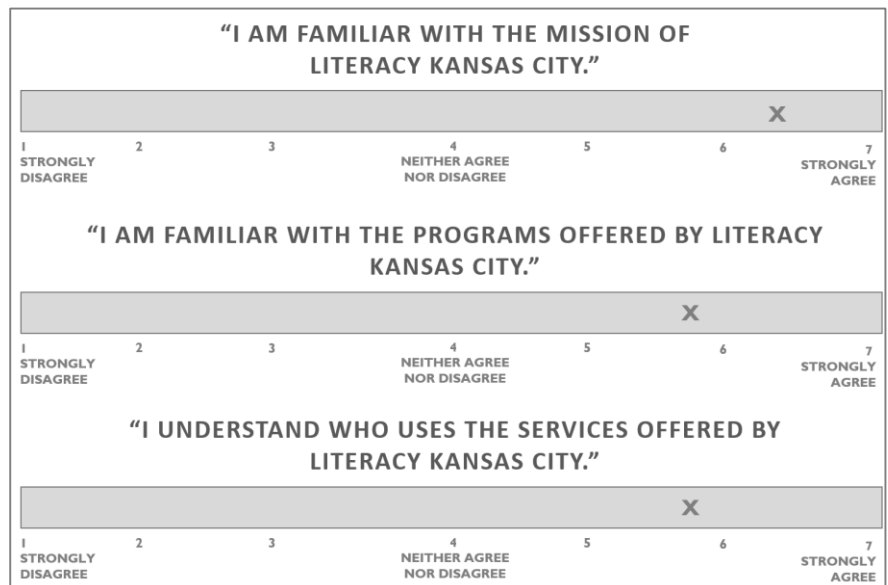


Continued efforts in donor recognition may be needed, based on these survey results.

## Knowledge of Literacy Kansas City

One of the two survey groups was asked to answer questions about Literacy Kansas City's mission, programs and population served. Respondents were familiar with the organization's mission. Almost 90 percent of respondents said they were familiar with the organization's mission. All open-ended answers to a question asking respondents to articulate the mission were related to adult literacy, and several quoted the exact mission of “literacy for all.”

Respondents were less confident of their familiarity with Literacy Kansas City's programs and who benefits from those programs.



While all results in this section were strong, the disparity between respondents' familiarity with the mission and their understanding of the programs offered and population served could indicate a need for more content about students and their experiences in donor communications.



## Email Most Preferred Communication Method

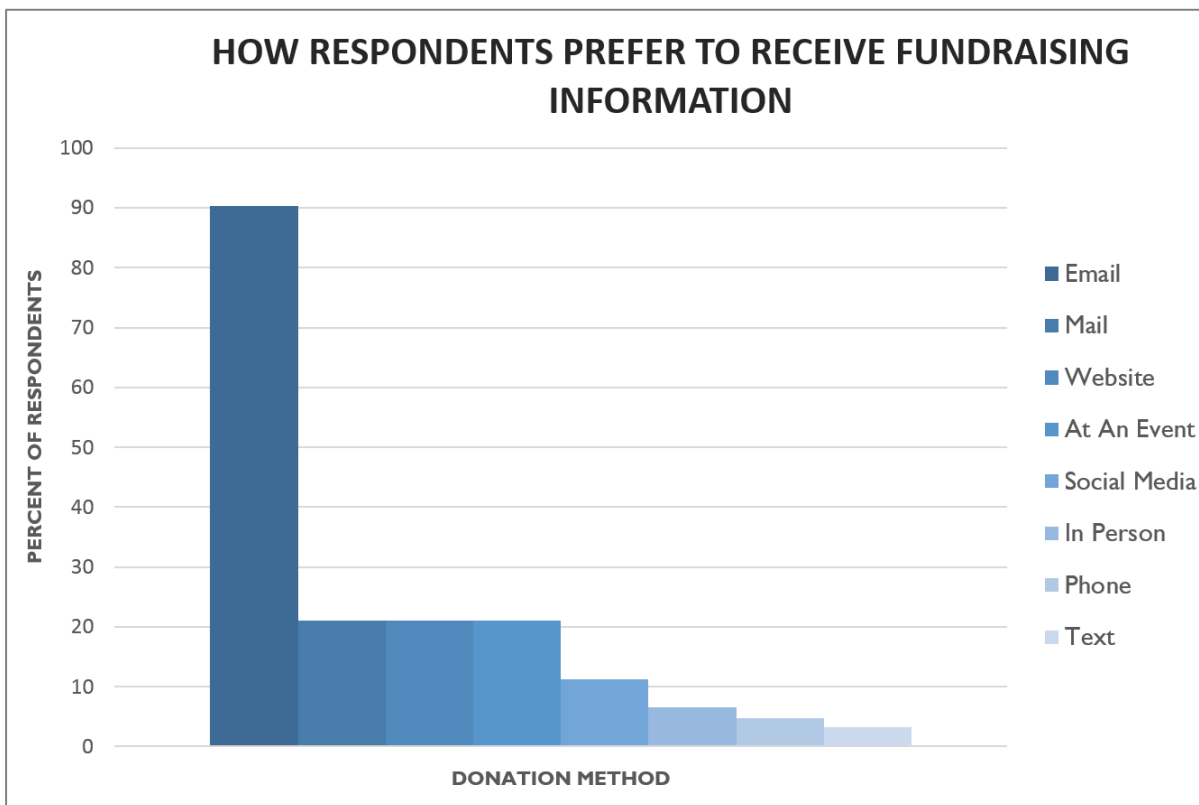
Respondents favored email heavily over all other communication channels for receiving information about donating from Literacy Kansas City, with more than 90 percent of respondents listing email as a preferred method of communication.

Receiving information at an event, in the mail, or retrieving it directly from Literacy Kansas City's website were fairly even the next most popular responses, with about 20 percent of respondents listing each method as a preference.

About 11 percent of respondents said they would prefer to receive information about donating through social media. These results indicate that social media, while useful for reinforcing messages and sharing personal stories, is not the preferred channel for receiving donation appeals for the current donor base.

If the preference for email communication does not correlate with how Literacy Kansas City receives donations, the organization may need to re-evaluate its messaging and calendar for email communication.

Communication preferences may be influenced by the demographics of the survey respondents. This survey was conducted by email, which may influence the preference for email communication from respondents.



## PRIMARY RESEARCH

### Literacy Kansas City Board Member Survey

(For a complete copy of the survey and survey responses, see Appendix F)

The IMC team designed a survey for frequent Literacy Kansas City donors and board members. Five people took the survey through Survey Monkey on Nov. 9, 2015.

The survey included elements of the shorter donor surveys and the team's survey of public perceptions of nonprofits and nonprofit giving in Kansas City.

Types of questions included:

1. The donor's relationship with Literacy Kansas City
2. The donor's impression of Literacy Kansas City's donor communications
3. The donor's knowledge of Literacy Kansas City's mission
4. The donor's knowledge of Literacy Kansas City's services
5. Donor giving information including dollar amount, income percentage and cause affinity
6. Perception of Literacy Kansas City's social impact, importance to Kansas City, and personal importance, compared to other area nonprofits
7. Demography (age group, gender identity, zip code)

While the sample size does not allow for significant quantitative analysis, survey respondents did offer input that could be considered qualitative research.

### What Motivates Them

Board members were asked to explain what motivates them to support Literacy Kansas City. Responses indicated an understanding of the positive impact Literacy Kansas City's programs can have on students' lives.

*"The idea that someone challenged in life would have the opportunity to better their lot in life because of the tools LKC provides."*

"Changing lives. It is becoming increasingly difficult to get by, let alone succeed, without the power of literacy."

"The idea that someone challenged in life would have the opportunity to better their lot in life because of the tools LKC provides."

### Summary

Responses were positive, and indicated a level of understanding for Literacy Kansas City's programs, services, and population served.

One respondent indicated a lack of confidence in submitting donations online through LiteracyKC.org.

There was some disconnect between respondents' assessment of their knowledge of Literacy Kansas City's programs and their ability to name those programs. Further education about the specifics and target audience of each program may be needed for board members.



# PRIMARY RESEARCH

## Nonprofit Giving Perceptions in Kansas City - Survey

(For a complete copy of the survey and survey responses, see Appendix G)

The IMC team conducted a survey of residents in the Kansas City area from Oct. 18 through Nov. 1, 2015. A total of 113 people took the survey through Survey Monkey.

The survey included questions in the following areas:

1. The respondent's involvement in giving to or volunteering for nonprofits in the Kansas City area.
2. The respondent's history, patterns and motivations for donating to nonprofits in the Kansas City area.
3. The respondent's perceptions of the social impact, importance to Kansas City, and personal importance of 10 nonprofits in the Kansas City area.
4. The respondent's preferences for donor communications and donor recognition.
5. The respondent's knowledge and perception of Literacy Kansas City.

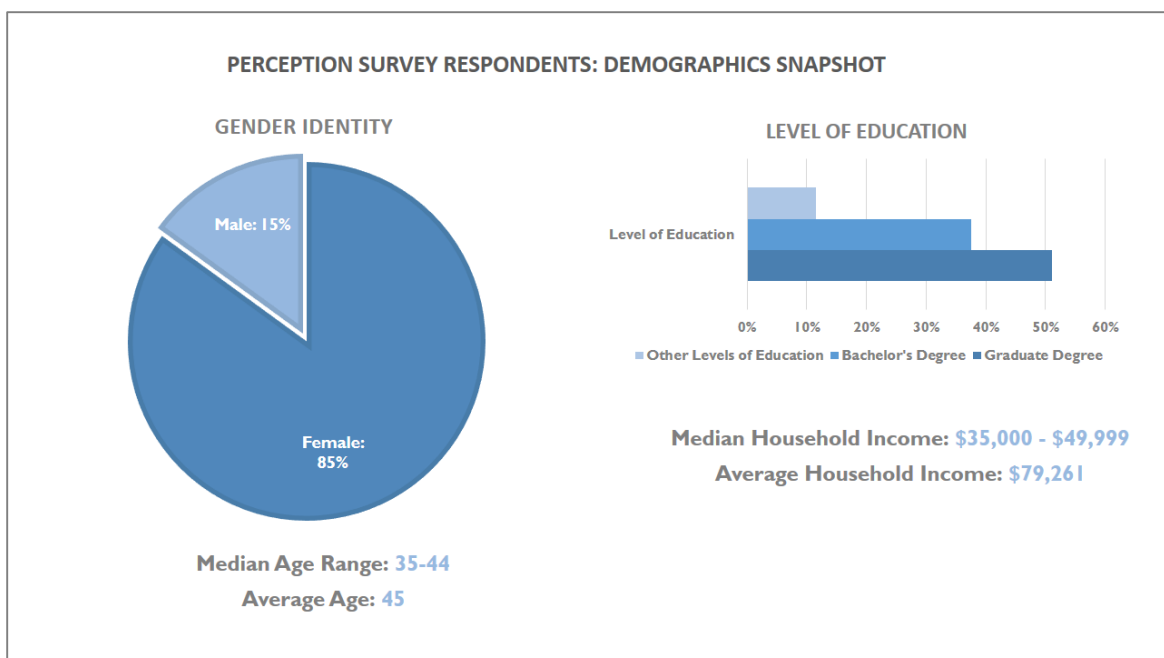
The survey also included demographic questions about gender, age, education level, employment status, household income, and zip code.

## Survey Respondents

Survey respondents were split across gender, age group, location, and household income. A majority of respondents were female, and more than 50 percent reported having a graduate-level education.

## Demographics snapshot:

- Gender: 85% female, 15% male
- Age: 35-44 median age range; 45 average age
- Education: 51% graduate degree, 37.5% bachelor's degree
- Employment: 73% full-time, 22.7% part-time
- Household income: \$35,000 - \$49,999 median income range; \$79,261 average income
- Location: 14.3% from Missouri, 85.7% from Kansas; most popular response areas were Lawrence and Johnson County

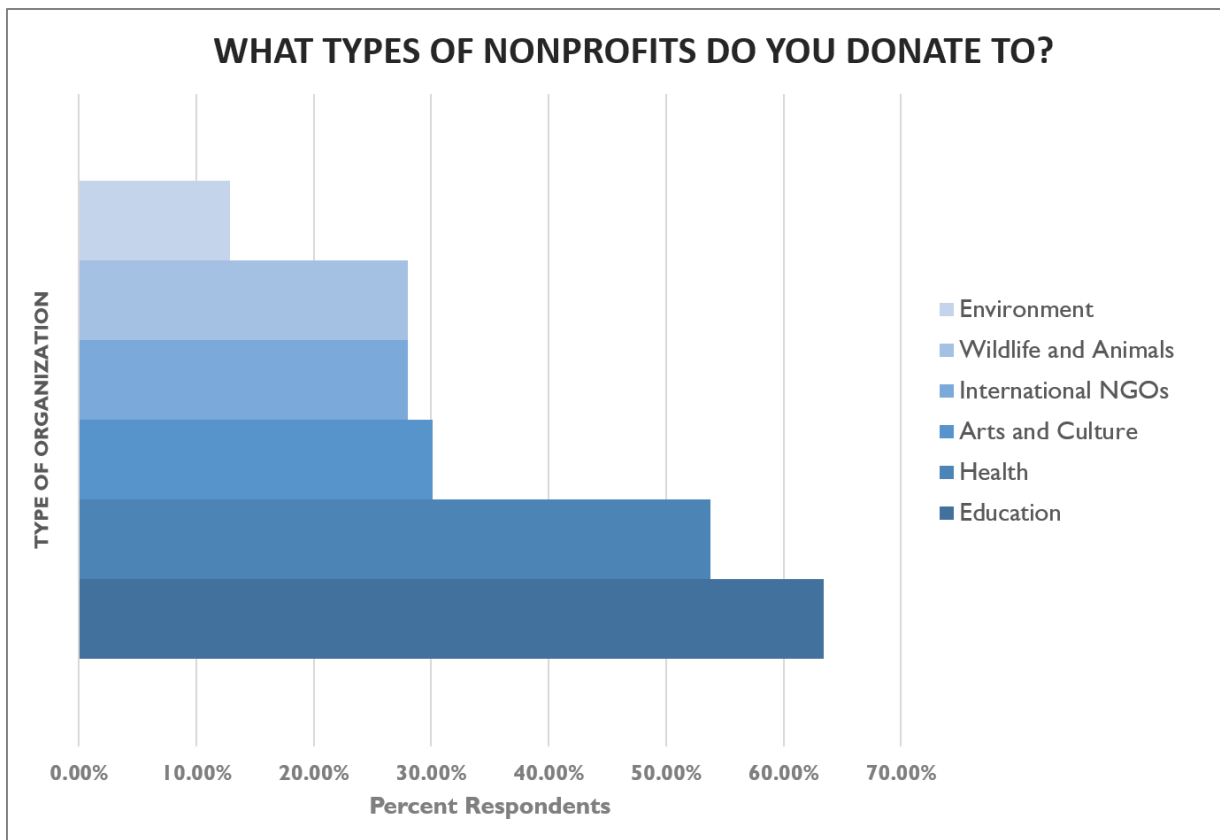


The respondent group was generally involved in volunteering or donating to nonprofits in Kansas City. Of 112 respondents, 90 percent said they had given a monetary donation, with 82 percent reporting donations in the 2015 calendar year. 79 percent said they had volunteered for an area nonprofit, with 57 percent reporting volunteering in 2015.

About 88 percent of respondents reported a range of annual nonprofit giving for 2015. From 107 respondents, the estimated average of giving in 2015 was \$507, with a median range of \$100-\$249.

More than 75 percent of respondents give less than 5 percent of their annual income to nonprofits. The median range for giving was 1-5 percent.

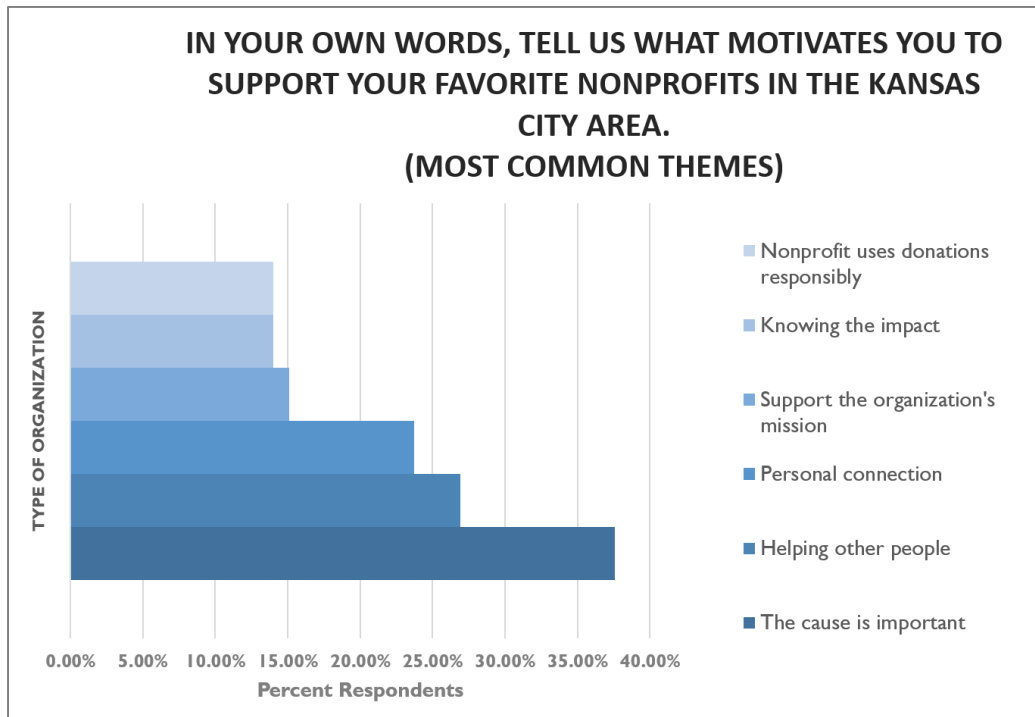
Of 96 respondents, 43 percent said they were familiar with Literacy Kansas City, and 57 percent said they were not.



## Key Findings

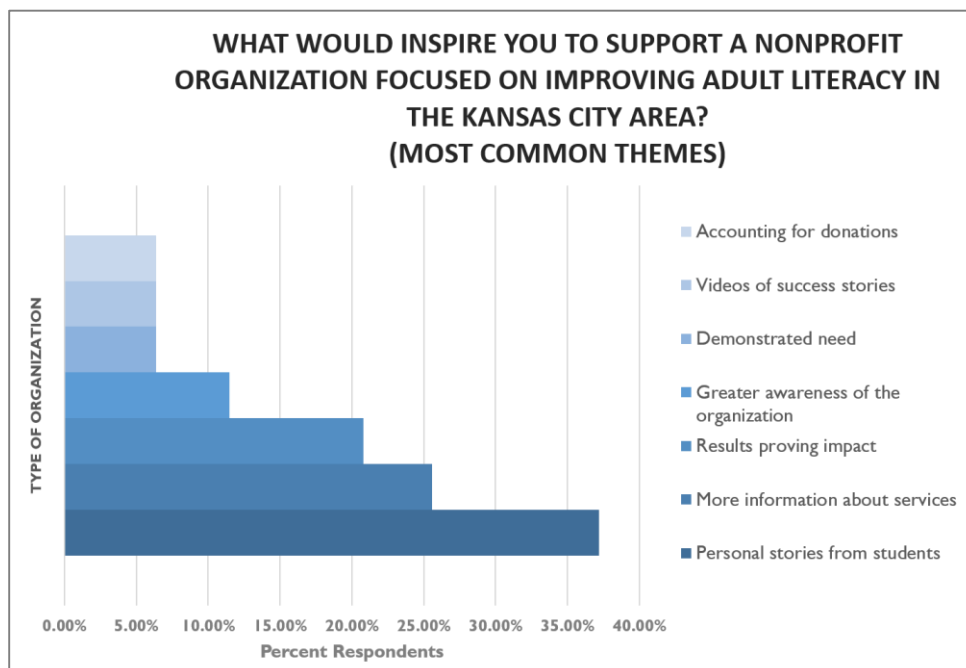
### Motivations for Supporting Favorite Nonprofits

Respondents were asked to state what motivates them to support their favorite nonprofits in the Kansas City area. Several themes emerged from the 93 open-ended responses, including the importance of the cause a nonprofit supports, a desire to help other people, and a personal connection to the cause.



### Motivations for Potential Gifts to Literacy Kansas City

Respondents were asked to explain what would motivate them to give to a nonprofit organization support adult literacy. Common motivators that emerged from 73 responses were personal testimonials, results proving the organization's impact, and more information.



## Perceptions of Social Impact, Importance to Kansas City and Personal Importance

To gain an understanding of how Kansas City residents perceive Literacy Kansas City in comparison to other nonprofits in the area, the IMC project team included a perceptions poll in this survey.

Respondents were asked to rate 11 different organizations in three areas - social impact, importance to Kansas City, and personal importance - on a scale of 1-9. A rating of 1 indicated low impact of importance, 5 indicated moderate impact or importance, and 9 indicated maximum impact or importance.

While Literacy Kansas City was in the lower half of the average ratings for each area, the organization exceeded the average respondent rating in perceptions of importance to Kansas City and personal importance. Literacy Kansas City reported lower annual revenues than all but one of the organizations included in the poll, according to data from the Greater Kansas City Community Foundation.

### Perceptions of Social Impact

(Average ratings in order from highest to lowest)

Average rating from all respondents = 5.91

1. Harvesters - 7.8
2. Habitat for Humanity - 7.39
3. American Heart Association - 6.58
4. United Way of Greater Kansas City - 6.52
5. Children's TLC - 6.29
6. KCPT - 6.1
- 7. Literacy Kansas City - 5.86**
8. Kansas City Pet Project - 5.41
9. Newhouse - 4.48
10. Mid-America Arts Alliance - 4.43
11. BikeWalk KC - 4.14

### Perceptions of Importance to Kansas City

(Average ratings in order from highest to lowest)

Average rating from all respondents = 6.25

1. Harvesters - 7.98
2. Habitat for Humanity - 7.23
3. United Way of Greater Kansas City - 6.89
4. KCPT - 6.63
5. American Heart Association - 6.57
6. Children's TLC - 6.46
- 7. Literacy Kansas City - 6.37**
8. Kansas City Pet Project - 5.80
9. Newhouse - 4.98
10. BikeWalk KC - 4.93
11. Mid-America Arts Alliance - 4.92



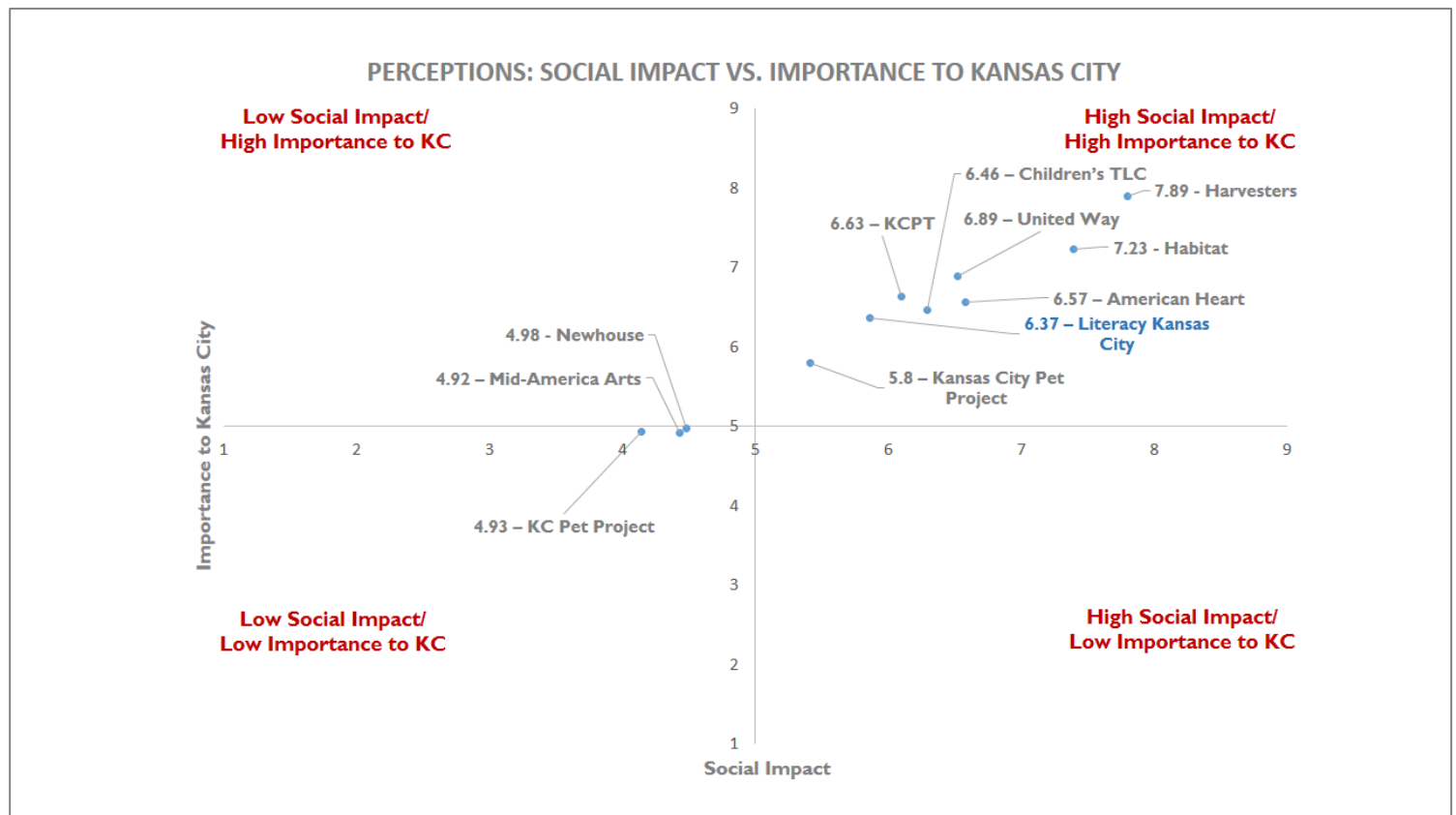


## Perceptions of Personal Importance

(Average ratings in order from highest to lowest)

Average rating from all respondents = 4.9

1. Harvesters - 6.91
2. Habitat for Humanity - 5.87
3. KCPT - 5.81
4. American Heart Association - 5.33
5. United Way of Greater Kansas City - 5.22
- 6. Literacy Kansas City - 5.2**
7. Children's TLC - 4.89
8. Kansas City Pet Project - 4.78
9. Mid-America Arts Alliance - 3.59
10. Newhouse - 3.27
11. BikeWalk KC - 3.06



Those who rated Literacy Kansas City at a 5 or higher in all three areas tended to be more familiar with the organization. For example, nearly 80 percent of those who gave Literacy Kansas City top marks in social impact said they were familiar.

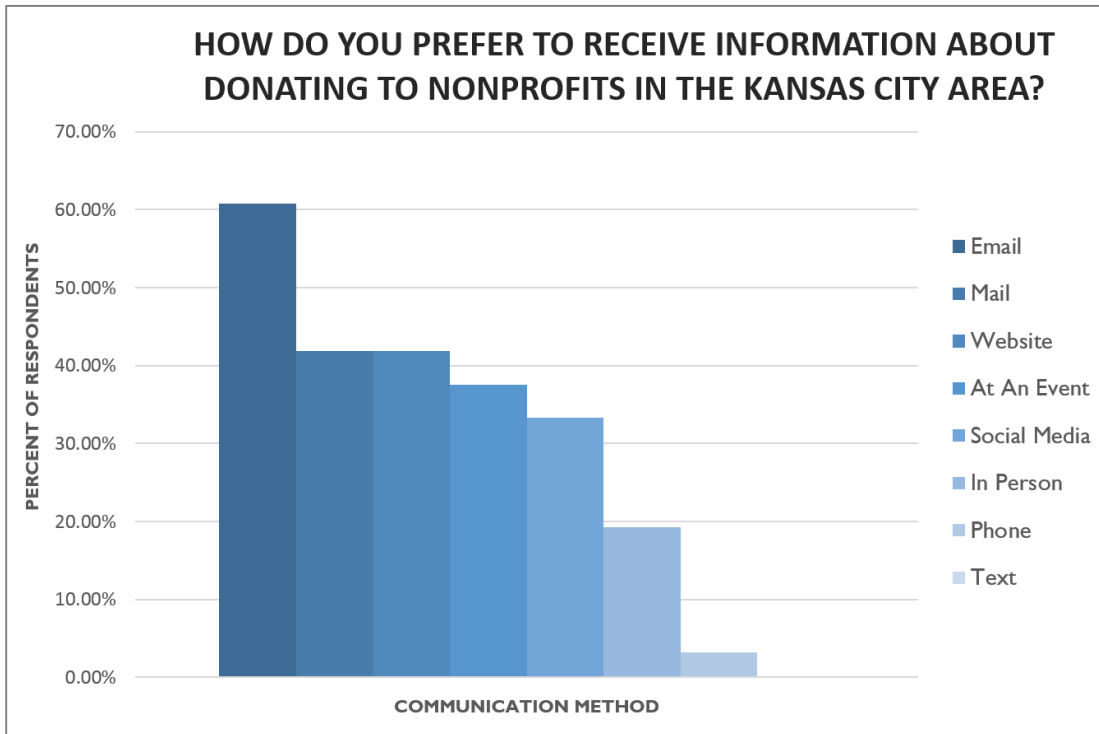
Hearing personal stories was a key motivator for that top-ranking group to support the organization.

Respondents who have Literacy Kansas City higher-than-average marks in social impact tended to mirror demographics of the survey group overall, with two exceptions: this group reported higher-than-average household income, and included more respondents in the 25-34 age group.



## Communications Preferences

While respondents reporting having received information about donating almost equally by mail and email, they reported a significant preference for email.



To reach new donors, Literacy Kansas City may need increased presence for donation information on their website and social media accounts.

## Donation Method Preferences

Donating online was the most popular channel, followed by mailing in a donation, and event donations.

- Donated online: 67.7%
- Mailed a donation: 41.9%
- Gave through workplace: 41.9%
- Gave at an event: 41.9%
- Attended a ticketed event: 34.4%
- Company sponsored an event: 19.3%
- Member of a donor program: 14%
- Have not donated: 5.4%
- Donated through the Greater Kansas City Community Foundation: 2.1%

Workplace giving may be an untapped area of potential donations, based on these results.



## Donor Recognition Preferences

A simple thank-you note was the preferred form of donor recognition for these respondents. Free event attendance and invitations to exclusive events also were popular. Commemorative gift items were less appealing, and some respondents specifically stated they don't like receiving gifts they didn't request.

### Which of the donor recognition items below would motivate you to support a nonprofit?

- Thank you note from staff: 75.6%
- Free event attendance: 52.4%
- Invitations to exclusive events: 30.0%
- Gift - T-shirt: 23.2%
- Gift - Coffee mug: 19.5%
- Name listed in annual report: 15.6%
- Gift - Tote bag: 14.6%
- Recognition at events - Director's table: 4.9%
- Recognition at events - Speaker's table: 2.4%
- Naming opportunities: 1.2%

## Conclusions

The results of this survey point toward a need for increased awareness of Literacy Kansas City in the Kansas City area. Increased efforts in an organized communications plan, telling student stories, and reaching new audiences could help boost awareness.

People support nonprofits because they believe in the cause and they want to help people. By telling personal success stories at events, on social media, and on the organization's website, Literacy Kansas City can create messages that match both of those motivators.

To increase awareness of the organization, Literacy Kansas City could continue to expand the size, number and reach of its events, opening them up to more attendees and potential supporters.

Survey results show online donations and web presence are important to those who support nonprofits. A re-designed website and a focus on showing results could create an appealing portal for those donors. Workplace giving could be an additional source of individual donations.



## PRIMARY RESEARCH

### Donor Communications Expert Interviews

*(For additional excerpts from these interviews, please see Appendix A - Expert Interview Excerpts)*

In October and November 2015, the IMC team interviewed two professionals in nonprofit fundraising, database marketing, and marketing analysis. Combined, these three experts offer nearly seven decades of experience in finding the right time, message and medium to reach out to donors and other prospects.

Each expert had time to review donor communication materials from Literacy Kansas City in advance of speaking with our team. Questions related to best practices in donor communications, strategy for database segmentation and analysis, and donor stewardship.

### The Experts

Team members interviewed donor communications professionals with expertise in database management, communication strategy, nonprofit fundraising, and database marketing. The interviewees were:

- **Alan Weber** - Principal and Owner, Data to Strategy Group - Weber is a consultant to businesses and not-for-profits in marketing database analysis. He is an adjunct professor of direct marketing at UMKC, and has served as an adjunct professor in database marketing in the Integrated Marketing Communications graduate program at the KU Edwards Campus.
- **Michael Baker** - Vice President Client Services, Dunham + Company - Baker has experience in nonprofit fundraising from several agencies and sectors, including medical, marketing, and religious organizations.

### Key Interview Findings

#### “Friendraising”

To get at the core of Literacy Kansas City's involved donor case, Weber recommended analyzing the donor database to find out which people who gave had also been involved as volunteers or event attendees. That analysis allows organizations to go beyond fundraising, allowing donors to pursue their interest completely through “friendraising.”

“I like to back up and say, ‘I’ve got fundraising and I’ve got friendraising, and friendraising is all about involvement,’” Weber said. “When you integrate the messaging of the relationship, it’s much more valuable to the person who is giving or volunteering with the organization.”

Donors who volunteer are more likely to donate again, and volunteers who donate are more likely to volunteer again, Weber said. To track and cultivate that involvement, organizations can keep a complete record of each donor’s involvement, along with their giving history, he said.

“You can’t separate that person’s involvement in the organization from their giving,” Weber said of engaged donors. “As long as the fundraising message is about involvement, it will be interesting.”



## **Avoid Silos**

Many nonprofit organizations tend to segment communication responsibilities between general marketing, volunteer communication, event planning, and donor communication, Weber said. Bringing those areas together, and avoiding organizational silos, allows for a more complete communications strategy.

An overall organizational communications strategy requires open lines of communication among staff members, managers, and volunteer board members in those areas. That collaboration allows for staff members to build richer connections with new donors and new volunteers faster, and clarifies messaging across areas.

## **Always Have Something Different**

Encouraging donors to enroll in monthly giving programs is one way to go about moving an annual donor to a sustaining one. In cases where a monthly giving program might not fit the needs of an organization, it's imperative to give donors something new to hold onto with each communication, Weber said.

Each new appeal or update to donors can include a new program, need or upcoming project that requires donor support. If, for example, a previous appeal was about sponsoring a tutoring program, the next appeal could focus on a family reading program, Weber said. Communicating unique, specific and interesting purposes for giving keeps donors engaged, he said.

Nonprofits that tell great stories and do impactful work aren't going to run off donors by communicating more, Baker said.

"If people have donated to you and they care about your mission and the services you're providing – even if they don't respond, hearing about it isn't going to annoy them," Baker said.

Establishing what Baker calls "a regular cadence of communication" reinforces a nonprofit's impact and purpose with donors.

## **Winning Back Lapsed Donors**

To win back lapsed donors and keep current ones, Baker recommends varying the type of communication and learning what works best for each individual nonprofit. That might mean starting out with a storytelling campaign that doesn't include a direct ask, or it might mean a direct appeal, he said.

Donors who have been silent for a few years but have given multiple gifts in the past are more likely to reactivate than those you've only given once, Baker said.

To keep current donors, Baker recommends thinking about someone's cumulative giving when developing a communications strategy.

"We like to look at people based on their cumulative giving in a time period," Baker said. "So, if a person has given a gift of four different \$100 donations, we're going to treat them as a \$400 donor. We're not going to treat them like a \$100 donor."



## **Create Donor Communication Templates**

Each communication to donors should answer two basic questions, according to Weber: what did the donor want to see happen when they gave their support, and how can the organization tell the donor that thing happened?

Building templates for regular updates and appeals can help get those questions answered in every donor communication, Weber said. Templates can apply to print communications, email marketing, e-newsletters, or social media campaigns.

“Never make a point without telling a story, and never tell a story without making a point,” Weber said. Powerful stories include a personal element and a specific case.

## **Segmenting the Database**

Labeling and segmenting the donor database by recency and frequency of donation allows organizations to know how they're doing with retention, acquisition and growth. Examined yearly, that segmented information can tell an organization what is driving change in their donations.

Weber suggests also mapping out where donors live using mapping software. Those maps provide a visual representation of where the organization is making an impact with its donor retention and acquisition efforts.



## PRIMARY RESEARCH

### Literacy Kansas City Donor Interviews

*(For additional excerpts from these interviews, please see Appendix B - Donor Interviews Excerpts)*

In November 2015, the IMC team interviewed two current Literacy Kansas City supporters and donors, using contacts provided by the staff of Literacy Kansas City.

Interview questions related to the donor's involvement with Literacy Kansas City, their motivations to support the organization, and their perception of the organization's donor communications and recognition.

### The Donors

Team members interviewed three Literacy Kansas City supporters. The interviewees were:

- **Evan Black** - Black has supported Literacy Kansas City as a math tutor and donor since 2008.
- **Ruth "Boots" Leiter** - Leiter has been involved with the organization since its early years in the late 1980s, is a member of the board's Advisory Council, and currently supports Literacy Kansas City through monetary donations.

### Key Interview Findings

#### Mission is Key for Supporters

Literacy Kansas City's mission of "literacy for all" was a primary reason donors gave for supporting the organization through volunteering and donating. Volunteers are able to see students go on to achieve life and career goals, said Evan Black, who has volunteered as a math tutor and donated to Literacy Kansas City since 2008.

*"Literacy is very foundational for having a quality life, and I want to support that however I can through my money and my time."*

"Literacy is very foundational for having a quality life, and I want to support that however I can through my money and my time," Black said.

Leiter noted that "250,000 people in Kansas City are functionally illiterate ... they need our help."

#### Tangible Recognition

Hand-written thank you notes on receipt letters, certificates of appreciation, and other tangible pieces of donor recognition are valuable to donors. Black mentioned having his name added to the Little Free Library at the Literacy Kansas City office as a thank-you gesture he appreciated. Hand-written notes also go a long way.

"I remember one time a couple of years ago I got a card in the mail that said, 'We really appreciate what you're doing for Literacy Kansas City'," and I really appreciated that," Black said. "I had that on my refrigerator for a while."



## Recognizing Sustaining Donors

As a monthly donor, Black said he does sometimes feel larger one-time contributions are recognized at a higher level than sustaining contributions.

"I know with the big fundraising events, there's always a push for large, one-time donations. But for me, as a monthly contributor, I don't usually donate to those events as much because I donate on a monthly basis," he said.

Literacy Kansas City could put procedures into place for thanking monthly donors on a regular basis, or add monthly donors to the list of those recognized at events.

## Memorial Contributions

Leiter suggested memorial contributions as a possible source of one-time, individual donations.

"They need to encourage people to list Literacy Kansas City in their obituaries, to get that message out - they could do that through their tutors," she said.

*"They need to encourage people to list Literacy Kansas City in their obituaries."*

For those whose families do choose to list contributions to Literacy Kansas City in a loved one's obituary, it's important for the organization to follow up with written acknowledgment of those contributions both to the donor and to the family, Leiter said.

While this program may be more difficult to promote to current supporters than traditional or legacy giving, it could be an avenue for not only donations, but for acquiring new donors. Including a personal touch in memorial gift donor receipts could demonstrate the memorialized person's connection to the organization.

## Conclusions

From interviews with two regular donors to Literacy Kansas City, it is clear that the organization's mission of "literacy for all" is paramount in attracting and retaining donors and volunteers. Finding ways to personalize the mission and its impact on students will help spread Literacy Kansas City's message.

Both regular donors were pleased with the level and method of communication they receive from Literacy Kansas City, and felt their donations were recognized. However, both mentioned instances where they felt Literacy Kansas City could do a better job with recognition, including recognizing sustaining gifts and memorial gifts.

While email was the preferred method of regular communication, both regular donors appreciated tangible thank-yous for donations, such as hand-written notes.







# Marketing Communications Plan



# MARKETING COMMUNICATIONS PLAN

## MARKETING COMMUNICATIONS PLAN

### Introduction

The tactics outlined in this marketing communications plan aim to help Literacy Kansas City:

- Communicate with current and prospective donors
- Move donors to higher levels of giving and engagement
- Compete with local, regional and national nonprofits as a valuable, impactful option for donor support
- Tell stories from students, volunteers, staff and supporters to inspire donors

Each section of this marketing plan outlines strategies, tactics and measurement guidelines for achieving Literacy Kansas City's fundraising goals.

### Action areas include:

- Branding
- Communication
- Organization
- Donor recognition
- Database management
- Event planning



## MARKETING COMMUNICATIONS PLAN

### Research Question 1: How can Literacy Kansas City communicate with current and prospective donors to help move people to higher levels giving and/or engagement?

#### Strategy 1: Coordinate messaging across areas of the organization.

Results of the nonprofit perception survey indicate awareness of Literacy Kansas City among residents interested in supporting nonprofits is relatively low. Many survey respondents said increased awareness of Literacy Kansas City and the people it helps would motivate them to support the organization.

As part of an effort to increase brand awareness, Literacy Kansas City needs to clarify its key messages and solidify its communications strategy. A cohesive set of key messages, an audit of all current communications, a content calendar, and adding dedicated communications staff would help direct staff and volunteer efforts in increasing awareness.

#### Tactic: Conduct an audit of all current donor communications.

Literacy Kansas City's communications are spread over multiple volunteer committees and staff areas. This can lead to inconsistent messaging and overlapping scheduling.

To get a full view of all communications coming from the organization, Literacy Kansas City could assess the delivery date, time, message, and person responsible for each piece of communication. This audit will be the first step to establishing a set content calendar for external communication. Updating this audit throughout the year will allow staff to assess the content and effectiveness of Literacy Kansas City's communications.

As a further step, we recommend testing some materials for usability. The organization could assemble a small focus group to identify the message and donation opportunity in specific communication pieces.

Types of communications to audit could include:

- Appeal letters
- Event invitations
- Social media posts
- Annual reports
- Fact sheets
- Brochures
- Emails to donors and volunteers

SAMPLE COMMUNICATIONS AUDIT GRID				
COMMUNICATION CHANNEL	TYPE OF COMMUNICATION	PERSON RESPONSIBLE	STAFF OR VOLUNTEER	NOTES ON RESULTS
Social Media	Facebook posts	Marketing Committee	Volunteer	x average number of people reached; x average likes/shares
Email	Monthly e-newsletter	Marketing Committee	Volunteer	x% open rate; x return on donation appeals
Mail	Annual donation appeal letter	Rachel Cash	Staff	x amount in donations; x percent donors contributing



**Measurement:**

This audit would result in a spreadsheet outlining all communications activities and who is responsible for them. Reviewing that spreadsheet might point out areas of overlap. Moving forward, staff could expand on this audit by tracking specific communications activities, including data such as key messages, desired effect and result.

<b>SAMPLE COMMUNICATIONS AUDIT TRACKING GUIDE</b>					
<b>COMMUNICATION CHANNEL</b>	<b>TYPE OF COMMUNICATION</b>	<b>POST/SEND DATE</b>	<b>KEY MESSAGE</b>	<b>DESIRED EFFECT</b>	<b>RESULT</b>
Social Media	Upcoming event post	11/11/15	Attend the Literacy for All Luncheon	Increase RSVPs to the luncheon by 25	Increased RSVPs to the luncheon by 30
Email	Monthly e-newsletter to donors	11/15/15	Your donation matters	20% open rate; 2% donation click-through rate	20% open rate; 1% donation click-through rate



**Tactic: Create a set of key messages for different audiences and topics.**

Crafting a set of key messages that are easily understandable and appealing to a wide audience will allow Literacy Kansas City staff, board members, and other supporters tell the organization's story in a concise and compelling way. Key messages may change for specific asks throughout the year.

SAMPLE KEY MESSAGES GRID				
	EVENT ATTENDEES	NEW DONORS	CURRENT DONORS	TOP DONORS
STUDENT SUCCESS	Literacy Kansas City students work hard and reach their goals. More than 300 students enrolled in our no-cost programs achieved personal milestones in 2014.	Literacy Kansas City students work hard to reach their goals. With your support, we can help hundreds of students meet personal goals every year.	Literacy Kansas City students work hard to reach their goals. With your continued support, we can help hundreds of students meet personal goals every year.	More than 300 of our students met personal literacy goals in 2014. We couldn't have helped them achieve those goals without your support.
IMPACT	Our programs change lives.	Your donation can change a life.	Your donation has helped change this person's life.	Your donations have helped so many people find success.
NEED	Reading is a critical skill for being able to apply for a job, use a computer, and succeed today's economy. By supporting Literacy Kansas City, you can help someone learn that skill.	Nearly 225,000 adults living in Kansas City don't have the reading skills needed to excel. Literacy Kansas City provides proven, free services to help.	Literacy Kansas City provides free classes and education to hundreds of students each year. You can help us help more.	We can do more. Literacy Kansas City served more than 350 students in 2014. Help us reach more of the nearly 225,000 who can benefit from our programs.
PROVEN RESULTS	Our programs have results: Literacy Kansas City students consistently improve their reading and writing after just one semester of no-cost classes.	Proven results: Literacy Kansas City students consistently improve their reading and writing skills in just one semester of no-cost classes.	Proven results: Our students consistently improve their reading and writing skills by multiple grade levels in just one semester of no-cost classes.	Proven results: Our students improved their reading and writing skills by an average of 1.7 grade levels in fall 2014.

**Measurement:**

Literacy Kansas City could begin using this messaging guide in its communications for the start of the 2016 calendar year. Informal conversations with supporters and event attendees about their impression of Literacy Kansas City's impact could help inform staff if the messaging is helping increase awareness and understanding. The staff could conduct a broad awareness survey toward the end of 2016 to find out if familiarity with the organization went up compared to the results of the nonprofit perceptions survey.



**Tactic: Create a content calendar for all communications coming from Literacy Kansas City.**

Several staff members and volunteers create and distribute content for Literacy Kansas City across email, social media, mailed materials and events.

Using the communications audit, the organization can establish a list of all communications activities, and start scheduling all messages and appeals across those activities. An organized calendar will prevent clusters of communication, and will allow staff to build momentum for appeals across channels.

Templates available through Hubspot and other online marketing tools sites include features such as character counts for Twitter and suggested schedules.

SAMPLE CONTENT CALENDAR						
CHANNEL	TYPE	SCHEDULED DATE	SCHEDULED TIME	ASSIGNED TO	KEY MESSAGE	TARGET AUDIENCE
Social Media	Facebook post	11/11/15	11:00 a.m.	Dana	Become a Literacy Champion	All current donors
Website	Blog post	11/17/15	3:00 p.m.	Rachel	Look for our newsletter	All current donors and volunteers
Email	Event invitation	11/23/15	10:25 a.m.	Haley	Books, Brains and Boulevard invitation	Past attendees; recent donors in lower 25th percentile

**Measurement:**

- Evaluate messages posted on the calendar weekly for the first three months of use; assign one full-time staff member to edit and organize planned communications for efficiency and cohesive messaging
- Establishing, updating and using a communications calendar through the first quarter of the 2016 calendar year
- Tracking email open rates, social media post reach, and audience interactions across messages; tools such as Hootsuite and Facebook Insights allow tracking for social media, and Google Analytics offers robust, free tools for analyzing website traffic
- Building three donation appeal and event attendance campaigns in the first quarter of 2016; tracking the return on these campaigns in dollar amount of donations and number of event attendees



## **Tactic: Add a dedicated communications and marketing manager position to the full-time Literacy Kansas City staff.**

Marketing communications responsibilities are divided among several staff members and two volunteer committees. While this model has sustained Literacy Kansas City through a period of restructuring and growth, it is not ideal if the organization continues to expand its services and audiences.

A dedicated communications and marketing manager would be responsible for strategizing, designing and disseminating materials including newsletters, emails, social media posts, event invitations, annual reports, videos, photo galleries, and blog posts. Assigning editorial control and communications strategy to one full-time staff member will allow for the development of a comprehensive communications plan and presence. Volunteers may still be involved in contributing ideas and content.

Literacy Kansas City has already invested resources and significant staff time in the development of a new brand and image for the organization. The communications and marketing manager would be instrumental in realizing and advancing the new brand.

### **Measurement:**

- Add a permanent, full-time communications and marketing manager position to the Literacy Kansas City staff by January 2019.
- Explore funding options to add a staff member earlier through grant funding or service staffing programs such as AmeriCorps.
- After this position is created, measurement for success can occur after the first six months for factors such as effectiveness of advertising dollars, reach of social media accounts, response to email and mail communications, and amount of media coverage.



## MARKETING COMMUNICATIONS PLAN

**Research Question 1: How can Literacy Kansas City communicate with current and prospective donors to help move people to higher levels giving and/or engagement?**

**Strategy 2: Improve the processes and options for online giving.**

Online giving is an increasingly popular way for people to support their favorite causes. Our secondary research shows more donors are giving online, particularly for smaller nonprofits. Literacy Kansas City can take advantage of this trend by amplifying and improving its options for online giving.

**Tactic: Re-create website for clean design, content highlights, and ease of use. Allocate resources for a contract designer to customize a pre-built web theme.**

Primary research shows that people who support nonprofits give online. More than two-thirds of respondents to the team's giving perceptions survey had donated online, and nearly 42 percent said an organization's website was a preferred method for receiving information about donating. Secondary research shows online giving has risen with overall giving.

To keep up with the trend toward online communication, Literacy Kansas City must build a web presence that is inviting, informative and easy to navigate. A redesigned website focusing on program impact and information is an important step in improving the organization's online presence.

Companies such as Organic Themes and ThemeForest offer WordPress-compatible themes for modest annual licensing fees. These themes feature flat, clean design that is mobile-friendly and displays nicely on most devices. The WordPress platform allows staff members with minimal web training to update pages and make minor design changes. While these themes are usable out of the box, allocating resources for a contract web designer to customize the theme would allow Literacy Kansas City to create a functional, informative and engaging website for its diverse audiences.

### **Measurement:**

The team recommends tracking traffic to LiteracyKC.org using Google Analytics, a free service. Measurement factors could include:

- Number of unique visitors to the website within a set time frame, compared to the same time frame one year prior
- Bounce rate from the home page; a high bounce rate from the main page indicates users are leaving the site without visiting other pages
- Bounce rate from the main donations page; a high bounce rate from the donations landing page indicates users are leaving the site without advancing to the donation form
- Analyzing the path a donor takes through the website with User Flow in Google Analytics; this path could be simplified with campaign-specific splash pages

Increased online donations, decreased bounce rate and a higher number of unique visitors all would indicate success with this tactic. Google Analytics estimates average bounce rate for content-based sites at 40-60 percent, and lead-generation sites to be 30-50 percent (Kusinitz, 2014). For its homepage, Literacy Kansas City could aim for a bounce rate of less than 40 percent.





**Tactic: Design an online giving portal that includes specific calls to action and instills donor trust.**

In addition to reworking the overall look and functionality of its website, Literacy Kansas City could design a new online giving portal to encourage donations and instill confidence in potential donors.

The current portal's uncustomized design could raise skepticism from prospective donors. In a survey of the Literacy Kansas City board of directors, one director put it this way: "An updated website would give me more confidence, to start." The board member suggested an online donation portal from a "known and trusted third-party service."

Paid services such as Network for Good and Givlet allow nonprofits to create branded donation pages that can be embedded into their current websites. These services do carry higher fees than PayPal, but offer more advanced customization opportunities, allowing for specific calls to action. Embedding a donation form from one of these services on campaign-specific landing pages would allow for specific messaging and measurement.

Database marketing professional Alan Weber suggests including direct access to the online giving portal in templates for all donor communications.

**Measurement:**

- Level of online donations for a specific time period, compared to online donations from the same time period one year prior
- Level of online donations resulting email-based calls to action leading to campaign-specific splash pages



## MARKETING COMMUNICATIONS PLAN

**Research Question 1: How can Literacy Kansas City communicate with current and prospective donors to help move people to higher levels giving and/or engagement?**

**Strategy 3: Create strategies for winning back lapsed donors and acquiring new donors.**

**Tactic: Work to re-engage lapsed donors with email marketing.**

Email marketing campaigns can be a cost-effective way to try to win back lapsed donors. Digital marketing experts at a recent workshop hosted by the KU Edwards Campus recommend designing an email campaign to lapsed donors asking if they want to remain on the email list. Those who say no should be removed from the list, along with those who haven't opened an email in more than a year. Cleaning up the donor list will help drive higher open and click-through rates, and will help focus the organization's email marketing efforts on potential donors.

Paired with Literacy Kansas City's current efforts to appeal to lapsed donors through mailed appeals, this email campaign would fortify the organization's contact list for all levels of support.

### **Measurement:**

Higher open and click-through rates for follow-up email appeals would indicate success for an email cleanup campaign. According to the email marketing provider MailChimp, the average open rate for nonprofit emails is about 25 percent, and the average click-through rate is 2.9 percent (MailChimp, 2015).

Further measurement could include level of donations from follow-up appeals to formerly lapsed donors.

**Tactic: Create a plan for turning first-time event attendees into new donors.**

Nearly 50 percent of the respondents to our donor survey said they had supported Literacy Kansas City by attending a ticketed event. Literacy Kansas City could expand its donor base by creating a strategy for turning first-time event attendees into new donors.

Tactics could include:

- Including a donation ask in all event presentations
- Offering ways to donate at an information table at events
- Collecting event attendee contact information through online signups; using that contact to send a follow-up email featuring a compelling story about the impact of Literacy Kansas City and an ask for a donation

### **Measurement:**

- Donations at event information tables
- Number of contacts acquired through event signups
- Percentage of first-time event attendees converted into regular donors



## MARKETING COMMUNICATIONS PLAN

### Research Question 1: How can Literacy Kansas City communicate with current and prospective donors to help move people to higher levels giving and/or engagement?

#### Strategy 4: Offer structured opportunities for donors to move to the next level of giving.

As long as each new communication includes a personal story or a new reason to offer support, donors will not tire of hearing from a nonprofit they believe in, according to the team's interviews with nonprofit fundraisers.

Engaging donors with fresh messaging and stories is a first step into increasing the volume of communication. Translating the connection to those stories into increased giving is the next step in that process.

Structured opportunities for advancing donors from one level of giving to the next include offering a set system of suggested donation amounts, instituting a monthly or sustaining gift program, and increasing the number of appeals during a year.

#### Tactic: Create a monthly donor program.

As both online and recurring giving increase, more nonprofits are creating monthly donor programs. These programs allow donors who may not be able to make large one-time donations contribute significant amounts over the course of a year. Participants sign up to have a set amount withdrawn from their accounts on the same day each month, and remain a member until they withdraw. Having monthly donors as a larger piece of its giving mix would afford Literacy Kansas City predictable, guaranteed revenue from individual contributions throughout the fiscal year.

Recognizing these monthly donors is crucial, and can be easily overlooked. The team's research suggests that Literacy Kansas City could improve in its recognition activities for monthly donors. Program-specific recognition and benefits should be a part of the monthly donor campaign.

#### Measurement:

- Add monthly giving buttons to online portals by the end of December 2015
- Add monthly giving checkboxes and calls to action to paper donation forms starting in January 2016
- Establish a monthly giving program to be launched in May 2016; include suggested monthly donation amounts; attach tangible items to each donation amount (example: \$25 a month covers reading materials for three students)
- Increase the number of monthly donors by 10% during the first two quarters of the 2016-17 fiscal year



**Tactic: Consider an end-of-fiscal-year campaign as a second large round of appeals.**

Literacy Kansas City's fiscal year runs July-June, and its appeals schedule runs on the January-December calendar year. This works well for approaching donors when they give most. The staggered schedule also offers logical timing for a late-spring round of donor appeals.

Adding a second appeal toward the end of the fiscal year offers a call to action: "Help us meet our goal." Secondary research suggests that while the highest volume of donations comes in December, donors are thinking about giving throughout the year. Because donors may not have large gifts planned for a May/June appeal, Literacy Kansas City could also use this campaign as a formal introduction to a new monthly giving program.

**Measurement:**

- Calendar year-to-date donations at the end of June 2016 compared to June 2015
- Frequency of donations for current donors in the 2016 calendar year compared to 2015



## MARKETING COMMUNICATIONS PLAN

### Research Question 1: How can Literacy Kansas City communicate with current and prospective donors to help move people to higher levels giving and/or engagement?

#### Strategy 5: Use database marketing to identify donor potential.

Database marketing is accountable. It is a customized application whose development must take many variables into consideration. Key measurements that already exist in Literacy Kansas City's database include lifetime donation history, contact information, amount donated, date and primary campaign source that encouraged the person to donate.

How a Database Builds Relationships: Add new data everyday such as survey answers, customer value, RFM. Update as often as possible and use it to create communications.

Tips for Database Management: Always maintain a strong strategy and know what you ultimately want to do with the information. Don't forget to use tests and controls.

#### Tactic: Track what types of appeals donors respond to in the Literacy Kansas City database.

We recommend assigning codes to types of appeal communications as well as the key message of each appeal. By tracking this information, Literacy Kansas City can start to build a response profile for each donor – what types of communication work best for that person, and what types of messages resonate most?

#### Measurement:

- Beginning with donation asks in early 2016, assign codes to communication types (email, direct mail, social media), appeal topics (program support, organization updates, student success stories), and key messages ("Your donation can help more people succeed")
- Run a report at the end of the first quarter to check for patterns in donation amount, communication type, topic and message
- Assess the most effective methods, topics and messages after one year of tracking appeals

#### Tactic: Identify fans of the organization by correlating volunteer hours with donor activity.

Volunteers are more likely to donate, and donors are more likely to volunteer, according to nonprofit fundraising consultant Alan Weber. To identify and grow fans of the organization, Weber suggests correlating volunteer hours with donor activity, and sending targeted communications that encourage people to become more involved.

This method of "friendraising" allows nonprofits to build a passionate audience that is likely to support the organization and help spread the word.

#### Measurement:

- Run a Salesforce report correlating volunteer hours with donor activity
- Identify a set of active volunteers who may be interested in donating, based on their hours committed to the organization; identify a set of active donors who may be interested in volunteering, based on their repeat support
- For each set, create a ratio of volunteer hours to donations; check that ratio at the start of a reporting period, and check again at the end of a reporting period



### **Tactic: Train staff in Salesforce**

To allow for increased data analysis, we recommend pursuing training in Salesforce for some Literacy Kansas City full-time staff members. Salesforce offers online guided training programs for a fee, and has many free resources on its company website.

Increased training in the platform's capabilities would allow Literacy Kansas City staff members to track more combinations of donor data, and would yield a clearer picture of who donors are, how they're involved, and what they respond to.

#### Measurement:

- Allow dedicated staff hours for peer-to-peer training on Salesforce functions and how Literacy Kansas City uses its database
- Set procedures as needed for privacy of student, volunteer and donor information
- Consider a Salesforce-led online training for staff members who would use the database most often



## MARKETING COMMUNICATIONS PLAN

**Research Question 1: How can Literacy Kansas City communicate with current and prospective donors to help move people to higher levels giving and/or engagement?**

**Strategy 6: Continue using events to attract new donors and recognize existing ones.**

Event planning in the sector of nonprofits is continuing to grow creatively and in popularity. If using best practices, strong strategies and analytics to keep track of attendees and more, these events can have a major impact in your organization.

Best practices in the field of nonprofit event planning include:

- Your event should have a value proposition that it can back up.
- Make minor changes to set your organization's event apart.
- Incorporate new technology to make donations easier.
- Advertise your event through several channels to make sure all your bases are covered.
- Keep track of dates – Anniversary Events can be particularly favorable with donors.

**Tactic: Continue efforts to expand the audience of flagship events such as the Literacy for All Luncheon.**

Literacy Kansas City has devoted staffing and monetary resources already to expanding donor events, holding its 2015 Literacy for All Luncheon in a larger venue with greater capacity. This strategy yielded a successful event; the organization will be able to measure the larger crowd's impact on overall donations after its year-end appeal.

We recommend continuing efforts to expand existing events that engage and inform current donors.

**Measurement:**

- Event attendance at future flagship events such as the Corporate Spelling Bee
- Compare attendance with costs to determine the cost-per-person for hosting each event
- Volume of donations at future flagship events
- Compare the average individual donation amount with the cost-per-person for each event



### **Tactic: Smaller, social events in casual settings, focused toward younger audiences**

Literacy Kansas City already has a slate of events that covers different audiences and runs through the calendar year. To increase the number of times the organization has a chance to introduce its cause and impact to potential new donors, we recommend pursuing a series of smaller, social events to attract a broader audience and a new set of young supporters.

A quarterly social event series at local businesses or organizations would allow Literacy Kansas City to try expanding its awareness and audience in a low-risk, fun setting. We recommend establishing a small “young friends” or “young supporters” group to take the lead on organizing these events.

#### **Measurement:**

- Plan and launch a quarterly small event series
- Track event attendance, event costs, and the cost-per-person of producing the events
- Pursue two young professionals, ideally employed at large corporations to join the Literacy Kansas City board; these people would be charged with building “young friends” efforts and would have connections to a broad base of potential event attendees and future supporters





## MARKETING COMMUNICATIONS PLAN

**Research Question 2: How can Literacy Kansas City position itself when compared to other local, regional and national nonprofits as a valuable, rewarding and impactful option for donors?**

**Strategy 1: Demonstrate the need for and impact of Literacy Kansas City's services.**

People want to support nonprofits that address an important issue and help others. More than half of the respondents to our survey on nonprofit giving said personal stories and proven results would motivate them to support an organization like Literacy Kansas City.

Literacy Kansas City stresses the need for its services by quoting the number of people in Kansas City who are functionally illiterate: 225,000. While that number is extremely significant, it may be more impactful to potential donors to focus on the number of people Literacy Kansas City has helped.

The organization keeps information about student success. Pairing numbers of students who have gone on to find jobs, earn promotions, achieve high school equivalency or take classes for college credit with national data on the positive economic impact of improving literacy rates would give Literacy Kansas City a compelling narrative for the need for its programs and their tangible impact.

There may also be potential for Literacy Kansas City to build on existing partnerships with local public libraries to reach an audience interested in literacy and education. Tactics could include partnering with libraries on public events, and working with local agency partners on an awareness campaign about the need for programs improving adult literacy.

**Tactic: Use data to tell Literacy Kansas City's story.**

Potential donors want to know how a nonprofit is helping people in their community. In addition to telling personal success stories, nonprofits can use numbers and results to tell their own story.

Organizations such as CureSearch, a cancer research organization, have been successful in creating impact reports. These reports show results in numbers, including the number of people served and the number of volunteer hours dedicated. CureSearch sends them two to three times each year, separate from an annual report.

Impact reports would include infographics showcasing student goal achievement; metrics such as event attendance; fundraising campaign updates; and short, personal stories.

As a test-run, we recommend Literacy Kansas City create an email impact report summarizing the first year of Ticket to Read and the Impact Initiative. This report would include a "help us do more" link to a donation page.

**Measurement:**

- Track open rate, click-through rate and level of donations from the first impact report
- Compare impact report response to regular e-newsletter response



### **Tactic: Create one-page fact sheets to be posted at LiteracyKC.org.**

Websites are a preferred source for general organization information, according to respondents to our nonprofit perceptions survey. They're also a top spot for finding out how to donate. To capitalize on traffic to its website, Literacy Kansas City should develop quick-hit guides to its programs and services and publish them at LiteracyKC.org.

Using information collected for annual reports, impact reports, grants and other results-based communications, Literacy Kansas City could create visually appealing fact sheets about its programs. These fact sheets would offer current and potential supporters a quick explanation of each program and its impact.

Fact sheets could also be distributed at public events and fundraisers, and posted at community partner locations such as libraries.

#### **Measurement:**

- Traffic to fact sheets on the website
- User flow from fact sheet pages to volunteer, donate and other action-related pages

### **Tactic: Rework all brochures and printed materials for targeted audiences.**

Current brochures are filled with text and information. Program descriptions can lean toward jargon. We recommend creating new program and organization brochures that use the new Literacy Kansas City logo, feature clean design, and target specific audiences. This updated collateral will allow Literacy Kansas City to more clearly explain its services to potential donors, volunteers and community partners.

Questions to ask when designing a brochure:

- Who is this intended for? Students? Volunteers? Donors? Community Partners?
- How can we describe the program in everyday terms?
- What are the three most important things to highlight?
- Where can the reader go for more information?

#### **Measurement:**

- Create a list of audiences; create a list of information that audience needs about Literacy Kansas City
- Write and design a new brochures using the list of audiences and a key messages guide; select three critical pieces of information to include in the brochure
- Complete and print a supporter-focused Ticket to Read brochure by June 2016



## MARKETING COMMUNICATIONS PLAN

**Research Question 2: How can Literacy Kansas City position itself when compared to other local, regional and national nonprofits as a valuable, rewarding and impactful option for donors?**

**Strategy 2: Work to engage younger donors to expand Literacy Kansas City's current donor base.**

Research shows that while Millennial donors in their 20s and early 30s don't account for a large percentage of nonprofit donations, a lot of Millennials - about 84 percent - do give.

Engaging some of these younger donors would grow Literacy Kansas City's donor base, and provide a set of donors to develop for years to come. This age group is more likely to get involved with a cause if a friend, co-worker or peer recommends it.

**Tactic: Establish a young supporters group.**

Nonprofits have worked to engage young supporters by establishing affiliate board groups. Young friends groups support an organization by educating a younger demographic on opportunities for volunteering, leadership and special events (Launch St. Louis, 2015).

Millennials may be limited in their ability to give now. Instead of pursuing large donations, this group could work to raise public awareness and understanding of Literacy Kansas City and the need its services meet. Young supporters group events could also be a way to introduce Literacy Kansas City to a wider audience and engage future donors.

Young friends groups typically operate as a committee or affiliate of a board of directors. We recommend piloting a young friends group as an affiliate group to the board of directors, recruiting current donors or volunteers as charter members. This group could eventually expand to include committees for planning specific fundraising events or recruiting new volunteers.

Potential pools for members could include local young professionals organizations such as the Kansas City Young Professionals Networking Society and GenKC. Reaching out to newer school teachers could also be a way to bring in supporters passionate about education and literacy.

For help planning a first young friends event, Literacy Kansas City could partner with SocialHeart, a young professional-driven nonprofit that plans unique social events and donates all proceeds to local causes. The group also supports existing nonprofit events with volunteer support, marketing and social media promotion, and assistance pursuing sponsorships (SocialHeart, 2015).

### **Measurement:**

- Establish a list of goals and prospective young friends group members in 2016
- Begin meetings and recruitment events in the first quarter of the 2017 calendar year
- Begin planning for fundraising and social events to start in the second quarter of 2017
- Track the number of new volunteers, donors and attendees attracted by the young friends group
- Track the number of volunteer hours and amount of donations attracted by the young friends group



## MARKETING COMMUNICATIONS PLAN

**Research Question 2: How can Literacy Kansas City position itself when compared to other local, regional and national nonprofits as a valuable, rewarding and impactful option for donors?**

**Strategy 3: Work to engage all donors by learning what appeals to them about Literacy Kansas City.**

Donor retention is a challenge for nonprofits nationwide. Retaining a current donor is less expensive and time-consuming than recruiting a new one, and nonprofits must work to keep donors engaged in their cause. Literacy Kansas City should work to keep donors engaged by finding out what drives them to support the organization.

**Tactic: Include a short donor questionnaire on annual appeal letter and/or newsletter.**

We recommend including a tear-off donation form with suggested donation amounts and blanks for donor contact information with all printed appeal letters, newsletters, and annual reports. In addition to donation information, Literacy Kansas City could learn about donor motivations by adding three questions to the donation form:

- What motivates you to support Literacy Kansas City? (check all that apply with a blank for comments)
- What is most important to you about Literacy Kansas City? (check all that apply with a blank for comments)
- How would you like to hear from us?

This information will allow Literacy Kansas City to tailor its messages to the causes and motivations that appeal to donors.

**Measurement:**

- Number of responses
- Content of responses; add this information to donor database entries



## MARKETING COMMUNICATIONS PLAN

### Research Question 3: How can Literacy Kansas City use the stories of their clients, volunteers and supporters to inspire donors and financial supporters?

#### Strategy 1: Take a storytelling approach to sharing student experiences.

Secondary research shows content that is able to clearly communicate a nonprofit's impact on individuals is key to attracting new donors, and affirms support from current donors. By gathering detailed accounts of students' journeys through its programs, Literacy Kansas City has an opportunity to tell stories with universal emotional pull.

Strong nonprofit stories tell donors why a nonprofit cares about an issue, and why supporting that issue matters. They focus on one person, and are authentic, transformative and engaging.

Additional success stories could come from former students. Literacy Kansas City could use its blog as a home for student-written accounts of their own enjoy through the literacy program.

#### Tactic: Create a brand standards guide that includes standards for voice, style and content in donor outreach.

To accompany its new logo and branding strategy, Literacy Kansas City should build a style guide for tone and content in all communications. Elements of this branding style guide would include:

- Brand position - a brief description of Literacy Kansas City's purpose and values
- Brand focus - What is most important to Literacy Kansas City?
- Program titles and brief descriptions
- Recommendations for logo use
- Grammatical style for punctuation, spelling and writing style (examples: AP, APA, Chicago)
- Brand colors, preferred fonts and other visual elements
- Preferred, simple terms for describing Literacy Kansas City's services and population served (examples: "students" vs. "clients", "illiterate" vs. "non-reading", etc.); these terms should avoid jargon
- Voice guidelines for donor communications, social media, student recruitment, and volunteer recruitment (examples: helpful, friendly, inspiring)

Future branding guide elements could include a set Powerpoint template for public presentations and branded slide templates for videos.

#### Measurement:

- Creation of a brand standards guide that includes updated information for Literacy Kansas City's new logo and branding efforts
- Application of brand standards to brochures, reports, newsletters, social media and website

The impact of a clear branding strategy across all audiences and communications channels may not be immediately evident. Long-term outcomes include increased public awareness of Literacy Kansas City and better public knowledge of the organization's services and impact.



**Tactic: Coordinate the roll-out of this style with the organization’s introduction of its new branding and logo.**

Content tone and style should be a consideration in Literacy Kansas City's upcoming rebranding rollout. Along with a new logo and organization brand, Literacy Kansas City should implement a basic style guide covering uses of the logo, key messages, and editorial guidelines for content.

Adhering to a style guide should begin internally and externally when Literacy Kansas City introduces its new logo in early 2016.

Literacy Kansas City should aim to include the style in all printed materials, social media profiles, and the organization's website within the first quarter of the 2016 calendar year.

**Measurement:**

- Completion and introduction of a basic branding style guide to coordinate with the introduction of Literacy Kansas City's new logo
- Use of new logo and branding style in all collateral by April 2016



## MARKETING COMMUNICATIONS PLAN

### Research Question 3: How can Literacy Kansas City use the stories of their clients, volunteers and supporters to inspire donors and financial supporters?

#### Strategy 2: Use video and other forms of multimedia to share stories.

Compelling content is an increasingly important element for nonprofits to be able to share personal success stories.

Asked what would compel them to support organization focused on improving adult literacy, perception survey respondents frequently mentioned videos featuring personal stories. Video and multimedia allow nonprofits to focus on the human aspect of their services.

#### Tactic: Create a series of videos featuring personal success stories.

Personal stories are compelling. While numbers may be sufficient to show grant funders and foundations a program is working, individual stories are the best way to demonstrate success to individual donors. Success stories were the most common motivator for perception survey respondents to support an organization like Literacy Kansas City.

To effectively share those stories with a wide audience, we recommend Literacy Kansas City create a series of one-minute videos focusing on a single student story. The narrative of each video should be all about that person - why they came to Literacy Kansas City, what they experienced in the program, and what an increased level of literacy has meant for them.

The team recommends pairing each video with a campaign-specific giving link, allowing Literacy Kansas City to track donations given in direct response to the video campaign.

Literacy Kansas City could use a similar strategy to occasionally share donor and volunteer stories.

#### Measurement:

- A series of three, one-minute videos to be filmed and produced during the winter 2016 class term, and shared through email and social media in spring 2016
- Level of social media engagement with videos in views, shares, likes and comments
- Level of donations within 24 hours after videos post
- Total donations attributed to the video campaign



**Tactic: Include success stories in thank-yous to all donors.**

Donors want to know their support matters. Our research shows donors are most interested in how their support can help someone and help Kansas City.

To demonstrate the positive effect a donation supporting literacy education can have on a student's life, we recommend including a personal success story in thank-you letters to donors. For maximum impact, Literacy Kansas City could keep stories on a similar theme for the appeal and the thank you, or provide donors with an update on the progress of the student featured in the appeal.

Nonprofit fundraiser Alan Weber suggests building templates for thank-you letters and emails that mirror the appeal template. Literacy Kansas City could use those templates with a content calendar to plan out campaign themes and subjects. Thank-yous should still include a personal note from Literacy Kansas City staff - something donors told us was important to them.

**Measurement:**

- Create a donation thank-you letter template that mirrors the appeal template
- Set a schedule for sending out thank-you letters following an individual donation
- Use a content calendar to coordinate messages and success stories for each appeal/thank-you
- Measure the effect of messaging in thank-you letters by tracking donor retention and frequency through the 2016 calendar year





## MARKETING COMMUNICATIONS PLAN

### Research Question 3: How can Literacy Kansas City use the stories of their clients, volunteers and supporters to inspire donors and financial supporters?

#### Strategy 3: Acquire the tools to be able to put together compelling stories.

Great storytelling requires time, knowledge and resources.

We recommend Literacy Kansas City pursue funding for acquiring storytelling tools including a video-capable camera and editing software. The organization could leverage knowledge and time from volunteers to start building an archive of high-quality photo and videos.

#### Tactic: Acquire tools to produce some design and multimedia pieces in-house.

While current Literacy Kansas City staff may not have the time or knowledge to create creative designs or videos from scratch, staff members could benefit from being able to make small edits and build a content catalogue without bringing in outside support.

The team recommends allocating funding for a monthly subscription to Adobe Creative Cloud and the purchase of a video-capable DSLR camera. There may be potential for these tools to be grant-funded. Editing software available in Creative Cloud will allow staff members to make small copy-editing changes to designs independently. Having a DSLR camera in-house will allow staff and volunteers to capture photos and video for future use.

In addition to acquiring the tools to make minor design edits in-house, we recommend Literacy Kansas City set a regularly scheduled, in-person meeting with its contract designer. These meetings will allow staff to clearly communicate expectations for branding and content, and should reduce the turnaround time for graphic design.

#### Measurement:

- Obtain funding for a video-capable DSLR camera and Adobe Creative Suite design and editing software; there may be a donor or local business involved in media, video production, design or advertising that would be willing to cover the costs of these items
- Setting a quarterly meeting with Literacy Kansas City's contract designer



**Tactic: Work with volunteers, local college groups, or other interested supporters to build a collection of video interviews, stock photography, and other elements.**

Area organizations have successfully recruited skilled, volunteer photographers and videographers to chronicle their work. The Lawrence Humane Society has a team of volunteer photographers to produce heart-tugging photos of kittens available for adoption.

Services such as VolunteerMatch.org allow nonprofits to post requests for skilled volunteers; Literacy Kansas City could use this or a similar platform to recruit a base of multimedia producers willing to commit hours and personal equipment.

Student groups and classes from the University of Kansas, University of Missouri Kansas City and Rockhurst University are an additional resource for volunteers who may be looking to build their portfolios while benefiting the community. Secondary research shows students in this age group want to do something tangible to support their chosen causes; offering skilled volunteer opportunities for photography and videography appeals to that need. Film, communications and journalism departments from these schools could be a starting point for recruiting student volunteers.

**Measurement:**

- A staff-maintained contact list of interested volunteer photographers and videographers by March 2016
- Quality, high-resolution stock photography to be used in future donor communications and on Literacy Kansas City's website by June 2016
- Photos of student and tutor interactions, students at work, and classroom instruction to be used in future fundraising appeals and grant submissions
- Archive of B-roll video footage to be used in future campaign and personal success story videos





# Timeline and Budget



# TIMELINE AND BUDGET

## TIMELINE

To assist Literacy Kansas City implement these concepts, we have created a three-part timeline to implement our suggested strategies. A good timeline should start with the more important yet attainable tactics. As the next three years progress, Literacy Kansas City's tactics become less specific and more general in terms of growth.

This timeline includes three parts:

- The next 6 months
- The next 12 months
- The next 3 years

### **0 - 6 months:**

- Literacy Kansas City should make a goal for all staff and board members to have a clear understanding of the changes that they hope to accomplish over the next three years.
- The organization needs to place priority on a content calendar in regards to donor communications.
- After the organization has made clear their preliminary goals and tactics, Literacy Kansas City can also begin to help bring increased awareness of the non-profit entity among its target demographics.
- Creation of a set of key messages for different audiences and topics and implementing it with a grid so that all employees can stay on track.
- Creation of a communications audit report so that all messaging flows together and implements an overall cohesive strategy moving forwards in regards to collateral materials.
- Begin basic ideas and generate a model for Literacy Kansas City's redesigned website. Time will be spent with a designer and staff to plan how best to modify and realign the new website with the goals and tactics explained in the plan.
- Lapsed donor e-mail campaign.
- Begin to create a donor program that will increase monthly donations over time.
- End-of-year campaign planning and implementation to gain larger donations.
- Continue to organize and plan small and large public events to increase donor base and awareness of Literacy Kansas City.
- Use what information can be found in the database and other Literacy Kansas City materials to create impact initiatives, factsheets, templates, brochures and other printed materials to encourage communication with new donors.
- Newfound focus on visual aspects to describe what Literacy Kansas City is doing for the community. Begin with selecting students or instructors to participate in informational videos that express how their lives have been impacted. Look into free options as far as student groups who could help accomplish the filming of these collateral materials.

### **6 - 12 months**

- As the organization's new identity solidifies, the branding becomes a very important issue and the new standards in logo use and other design elements will be something that everyone working for the cause of Literacy Kansas City should abide by for consistency.
- With a new website underway, the ways to donate must also change with it. Look into all available options and find a simple, functional tool that also looks clean and easy to implement with the website plans.
- Track appeals and evaluate donor time in comparison to dollars given.



- Staff will all be advised to learn Salesforce, as another way of keeping the organization interconnected. Consider purchasing graphic design software if an employee at the organization can use it to personalize collateral materials and high-quality designs for invitations to events and fundraisers.
- More local social events led by Kansas City Literacy's staff to continue to increase awareness of their importance in the community.
- Develop a donor questionnaire for donors to better understand how they are being perceived in regards to awareness and these newly implemented action items – attach with an appeal letter.

### **1 year - 3 years**

- Complete the hiring process for a communications/marketing manager in a full-time position at Literacy Kansas City. They will maintain the high-quality materials, social media content and local PR activities that people respond to and as a result become more involved in the organization.
- Key donors and more students will become more aware of Literacy Kansas City and the services that are offered.
- Network often with new board members and donors, keeping them in the loop with upcoming events and issues that will occur over the next three years.
- Consider creative tactics to incorporate into Literacy Kansas City's future: themed outings, graduation ceremonies, Whole Foods 5% Giving Days, The Spelling Bee, and coverage in the local media.
- If interested in increasing the amount given at the Literacy For All Luncheon (and other local events), look into Square – a popular mobile credit card payment option that can be achieved cheaply and is easy to use in big social situations.
  - See "Supplemental Items" for more information on this tactic.
- Apparel that could be sold at Literacy Kansas City's events and to their donors. Online buying availability.
- Continue to send out collateral materials, appeals, invitations to events and thank you cards to show appreciation to the donors that support you regularly.



## BUDGET

The IMC project team has considered Literacy Kansas City's current budget in our recommendations for tactics and deliverables. There are three phases of a project budget included here:

- Phase 1 outlines tactics and deliverables at low or no cost that could be completed during the 2016 calendar year.
- Phase 2 outlines tactics and deliverables that require some financial investment or lead time, and would likely need to be completed during the next fiscal year.
- Phase 3 covers all suggested tactics and deliverables to be completed in the next three to five years.

Volunteers or board members could help alleviate staff time requirements for tactics included in Phase 1.

<b>BUDGET - PHASE ONE</b>		
<b>TACTIC</b>	<b>DELIVERABLE(S)</b>	<b>ESTIMATED COST</b>
Create a set of key messages for different audiences and topics.	Key messages grid	10 hours of staff time
Conduct an audit of all current donor communications.	Communications audit report	10 hours of staff time for base audit; 1 hour/week for updating
Create a content calendar for all communications coming from Literacy Kansas City.	Content calendar	2 hours of staff time to create calendar; 1 hour/week staff time for updating
Re-create website for clean design, content highlights and ease of use.	Re-designed website	\$70/year licensing fee; \$500 in contract web design work; 20 hours of staff time for planning
Work to re-engage lapsed donors with email marketing.	Lapsed donor email campaign	20 hours of staff time
Create a monthly donor program.	Monthly donor program	30 hours of staff time
Consider an end-of-fiscal-year campaign as a second large round of appeals.	End-of-fiscal-year donor campaign	\$800 printing costs; \$2,000 mailing costs; 20 hours of staff time
Continue efforts to expand the audience for flagship events such as the Literacy for All luncheon.	Marketing and event space for flagship events	\$400 in venue rental; \$400 in additional marketing; \$400 in additional printing and mailing costs; 30 hours of additional staff time



## BUDGET - PHASE ONE

TACTIC	DELIVERABLE(S)	ESTIMATED COST
Use data to tell Literacy Kansas City's story.	Email impact report summarizing year one of the Impact Initiative	10 hours of staff time
Create one-page fact sheets to be posted at LiteracyKC.org	One-page fact sheets about Literacy Kansas City's programs	\$200 in contract design work; 20 hours of staff time
Rework all brochures and printed materials for targeted audiences.	Supporter-focused Ticket to Read brochure	\$200 in contract design work; \$300 in printing costs; 10 hours of staff time
Establish a young supporters/friends group.	List of goals and prospective members	20 hours of staff time
Create a series of videos featuring personal success stories.	Three, one-minute videos	10 hours of staff time; volunteer assistance
Include success stories in thank-yous to all donors.	Thank you template with success stories	10 hours of staff time
Work with volunteers, local college groups and other interested supporters to build a collection of video interviews, stock photography, and other elements.	Volunteer list; stock photography collection; B-roll archive	10 hours of staff time for initial contacts; 2 hours/week for volunteer management; volunteer assistance

**Total Staff Time - Initial Projects: 232 hours**  
**Total Staff Time - Weekly Updates: 208 hours**  
**Total Cost: \$5,270**



## BUDGET - PHASE TWO

TACTIC	DELIVERABLE(S)	ESTIMATED COST
Design an online giving portal that includes specific calls to action and instills donor trust.	New online giving portal	\$80/month; 20 hours of staff time
Track what types of appeals donors respond to in the Literacy Kansas City database.	Appeals codes in donor database entries	20 hours of staff time for setup; 1 hour/week for upkeep
Identify fans of the organization by correlating volunteer hours with donor activity.	Report comparing volunteer hours to donations	40 hours of staff time
Train staff in Salesforce	Staff knowledge of Salesforce functions and Literacy Kansas City data	\$600 for Salesforce training; 40 hours of staff time
Host smaller, social events in casual settings focused on younger audiences.	Quarterly event series	\$1,000 for event costs and marketing; 60 hours of staff time
Rework all brochures and printed materials for targeted audiences.	Remaining brochures after Ticket to Read	\$500 in contract design work; \$900 in printing costs; 30 hours of staff time
Establish a young supporters/friends group.	Fundraising and social events	\$500 in event planning costs; \$200 in marketing costs; 20 hours of staff time
Include a short donor questionnaire on annual appeal letter and/or newsletter.	Donor questionnaire	5 hours of staff time





## BUDGET - PHASE TWO

TACTIC	DELIVERABLE(S)	ESTIMATED COST
Create a brand standards guide that sets rules for voice, style and content in donor outreach.	Brand standards guide	30 hours of staff time
Coordinate rollout of the style guide with the organization's introduction of its new brand and logo.	Coordinated brand rollout	\$500 in contract design work; 20 hours of staff time
Acquire tools to produce some design and multimedia pieces in-house.	Adobe Creative Suite; DSLR camera	\$36 Adobe Creative Cloud subscription; \$750 video-capable DSLR camera; 5 hours/month of staff time for creative projects; 2 hours of initial staff time
Add Square for taking donations on-site at events	Square reader	\$29 for the reader

**Total Staff Time - Initial Projects: 287 hours**  
**Total Staff Time - Weekly Updates: 117 hours**  
**Total Cost: \$6,371**



## BUDGET - PHASE THREE

TACTIC	DELIVERABLE(S)	ESTIMATED COST
Add a dedicated communications and marketing manager to the full-time Literacy Kansas City staff.	Communications and marketing manager	\$38,000/year, including benefits; 40 hours of staff time for hiring

**Total Staff Time: 40 hours**

**Total Cost: \$38,000**

## BUDGET - TOTALS

**Total Staff Time - Initial Projects: 559 hours**

**Total Staff Time - Weekly Updates: 325 hours**

**Total Cost: \$49,641**



PREPARED

# Appendices



# APPENDICES

## Appendix A

### Expert Interview Excerpts

#### Expert Interview 1: Alan Weber, Principal and Owner, Data to Strategy Group

##### **What are some key pieces of information Literacy Kansas City could look for in their donor database to help drive marketing decisions?**

“How many people in their donor database are involved in some other way?”

(Weber gave examples of performing arts organizations where departments had been divided in their communication with donors and volunteers, then spoke about his recent work with the food bank organization Harvesters in the Kansas City Area).

“People who had any kind of crossover activity - if they donated and then volunteered - they were much more likely to donate again, as well as to volunteer again. ... What they (Harvesters) ended up doing was they set up communication between the managers, and they figured out how to get people more involved in the organization.”

“I like to back up and say, ‘I’ve got fundraising and I’ve got friendraising, and friendraising is all about involvement’.” ... “When you integrate the messaging of the relationship, it’s much more valuable to the person who is giving and volunteering with the organization.”

“I’m really interested in their activity with the organization, and that’s very different from donor capacity. ... I’d really like to know involvement as well as giving, so that when people are interested in something, they can pursue that interest in a complete way.”

(Weber noted that for many nonprofits, the information needed to know how donors are involved with the organization isn’t kept in the same place as information about their donations).

“To do the integrated communication you want to do, you need that holistic picture.”

##### **How can nonprofits use their donor communications to advance current donors to higher levels of giving?**

“The mega-trend has been going to monthly giving. ... As far as advancing to higher levels, that’s similar to any kind of up-selling in marketing: is there anything else they could support, or anything else they could do.”

“... If they hear something else they could give to and something else they could support changing and being specific with a unique request, so it’s not the same request over and over again. ... I realize in order to be manageable, it has to follow some sort of template ... but always have something different they could do.” ... “If they were sponsoring a tutor program last time, we’ve got this other program for family reading.”



## **What are some of the key best practices for communicating with donors?**

“Remembering that you can't separate your friendraising from your fundraising, and you can't separate that person's involvement in the organization from their giving. ... As long as that fundraising message is about involvement, then it's interesting.”

“Never make a point without telling a story, and never tell a story without making a point.”

“You want to stop and say, ‘What is the donor supporting here, and how do I show them they got it? What do they want in its most basic sense?’”

“Think of it in terms of branded communication. ... What is the brand position here of what this organization does. ... Then the communication (to the donor) is about how they did that, how they got their money's worth by helping someone do that.”

“You should be able to say on the most the basic level, ‘What did our donors want to see happen when they gave us money, and how do we tell them we did it.’”

## **How could Literacy Kansas City go about segmenting their donors in their databases for different messages?**

“You can never go wrong with a recency, frequency, monetary kind of segmentation. ... I would want to have a good idea with any database how I was doing with retention, with acquisition, and with growth, so I knew year to year what was driving change.”



**How can a nonprofit create more revenue as far as donors? If your nonprofit subsists mainly from grants right now, is that sustainable?**

"I would recommend that a nonprofit needs a diversified stream of revenue. So if any single area of revenue goes away, they will have others to depend on. The key terms we would be using here are that the revenue needs to be "sustainable" and "scalable." Is this revenue sustainable? Can we keep going after it and can we keep going after it as the scale of our organization grows? As the demand for our services grow?"

"Grants and foundations are important, but they are going to be only one stream of revenue and you need a big donor base that really cares about what you're doing."

**Any strategies to win back lapsed or previous donors?**

"Establish a regular cadence of communication with all donors. You have to tell them 'stories of impact' – a story about how this specific person learned to read and is now holding this specific job or whatever else. You've got to get those stories out into the public."

"You just need to be continuing to share those stories and talk about things that donors have specifically made possible, so they feel the true effect of what their money has done. If they've given a gift three months ago, you need to be asking them for another donation."

**Recommended number of appeals annually? End of year appeal and end of June appeal?**

"The number of appeals varies, but – going from two to four? Going from four to six? That is doable. They should pace themselves, but I definitely see clients and organizations that have appeals put in the mail asking for money 20 times a year. And they all make money; they're all super profitable."

"If you're telling stories and doing good work? You're not going to run people off by asking them for more money. If people have donated to you and they care about your mission and the services you're providing – even if they don't respond, hearing about it isn't going to annoy them."

"As far as re-establishing lapsed donors, going out and saying, 'Okay, we're going to start communicating on a much more frequent basis – it just needs to be done more often.' Maybe 'we're only going to send out five communication pieces that are just comprised of stories, and then five that are specifically asking for money.' Just have to feel it out, but definitely need to increase this relationship with all their donors and keep track of who has given."

"All that needs to be kept up in their data and be closely watched by someone. It's all depends on how far back they think is reasonable to go as far as lapsed donors. From a lapsed donor standpoint, I would look at the donor that gave you one gift as being not as valuable as the donor that gave you multiple gifts. So if you've got a lapsed donor who hasn't given in three years, but prior to that they gave four or five gifts? They're going to be easier to reactivate than the guy who gave one gift five years ago."

**How do you move people to higher levels of giving and what are some ways to best communicate in innovative ways?**

"What we've seen over time is that you treat people differently based on the way that they are giving. So, if a guy gives you \$200, you're going to treat him differently than the guy who gives you \$50. You send them a letter asking for money, that \$250 guy needs a way more personalized letter – use his first name and it's going to be more specific. It's a more unique letter that feels connected to them. As you communicate to a donor and treat them in different ways, they'll stick around. They automatically will give again and again."



“We like to look at people based on their cumulative giving in a time period. So, if a person has given a gift of four different \$100 donations, we’re going to treat them as a \$400 donor. We’re not going to treat them like a \$100 donor. If someone gives four gifts of \$250, now we’re going to treat them like a \$1,000 donor. They aren’t a \$250 donor in your database.”

“The more you communicate with people, the more personalized the message is matters. Also, the way you say ‘thank you’ to a gift is of huge importance. That has a big impact on whether people give again or not.”

**As far as trends – what do you think about the age range of donors? Currently at Literacy Kansas City, their donors are obviously older but they have expressed interest in looking to diversify their donor base.**

“55 and over is totally normal for a non-profit donor base. Their goal should be, ‘We need more donors of any kind.’ Maybe even the idea of, ‘let’s actively seek out 55 and older females in the Kansas City area, because this cause might just appeal to them more’.”

“You should only care about the people who care about your mission.”

**Donor recognition – what about those donors who are wanting to feel more valuable?**

“It doesn’t have to be anything super fancy – there’s no silver bullet here. You just want them to feel valuable and you tell them that they are valuable a lot.”

“All of that communication matters. Make them feel important – and you can even do that while you’re asking for money, you also have to make them feel valued while doing so.”

“A lot of groups use “levels of giving” structures ... but I don’t even think that type of thing is really that great. It’s just more about telling specific people how exactly they are valuable. I would say the appropriate thing, and a very cheap way to handle this? Have somebody pick up the phone and just call them. Tell them thank you. And this needs to be a specific employee’s task. And it’s nothing more than, “we just want to say thank you.” As we’ve seen, the vast majority of the time, you’re just leaving a message. It’s just a simple thank you but it’s personalized and people love it.”

“You can’t do that for every gift, but you should draw a line and decide who will receive the phone calls.”

**How can you maximize a nonprofit’s efficiency for fundraising and organize specific employee responsibilities within that group?**

“Make sure each person is put in a role that is suited for them, with specific tasks that only they are responsible for.”

“The employees need certain tools on-hand to complete tasks well. So they need to be given them to really run more efficiently. One of the things that we actually put into practice at our own company and advise others to do is that they say, ‘What are our goals for this employee? What goals are they trying to accomplish? How much money will be needed to fund these things?’ So, all the things that need to be done – now then you will clarify what needs to be taken care of immediately and what can be put on the back burner. Now, define who should be in charge of all the tasks. What tools do they need to accomplish it? Now, set timelines.”

“Once you break it down then it’s easier to see measurable results from the group.”



## Appendix B

### Donor Interview Excerpts

*Paraphrased information is in parentheses. Direct quotes are noted with quotation marks. Excerpts were edited for length and clarity.*

#### **Donor Interview 1: Evan Black**

##### **What's your involvement with Literacy Kansas City? How long have you supported the organization?**

(Black said he has volunteered as a math tutor since July 2008, and has also helped as a volunteer at fundraising events.)

##### **What motivated you to start supporting Literacy Kansas City? What motivates you to continue supporting the organization?**

"I appreciate the mission and I appreciate what they're doing as far as bringing literacy to all. ..."

"Literacy is very foundational for having a quality life, and I want to support that however I can through my money and my time."

"I enjoy the interaction with the students I help out, and I've been able to help them go on to achieve their other goals with their life and their career."

"I haven't really felt at any time that my contributions were underappreciated, so they do a good job of expressing appreciation for what I contribute."

##### **Would you like to receive the same amount, more or less information from Literacy Kansas City?**

"I know I'm on the email newsletter list and get information about volunteer opportunities and also what's going on in the organization, and I occasionally get things in the mail, usually related to larger fundraising events. ... It's been a good amount of communication for me. It seems like the right amount and the right frequency for me."

##### **Are there topics you'd like to hear more about from Literacy Kansas City?**

(Black mentioned student success stories, upcoming volunteer opportunities, and volunteer spotlights as topics he enjoys hearing about.)

##### **What would you tell someone to encourage them to support Literacy Kansas City?**

"For me it's been very valuable working directly with students, getting to know their backgrounds, and also helping me to appreciate the education that I have, because I've been able to learn enough literacy and math that I've been able to support them and allow their learning of those skills."

"I really enjoy donating my time and my money, and it seems that the impact it makes on the people I've helped and other people have helped in the organization -- that sense of appreciation that I actually contributed and I helped make what Literacy Kansas City does a reality, rather than just something theoretical."

##### **Are there pieces of information you'd like to see communicated?**

I do remember as far as the Literacy Champions newsletter at the end of the year ... there were statistics in there -- how many volunteer hours were put in, how many students were helped, and how much money as far as the income and the expenses ... seeing concretely how many people were helped, and how many people contributed to providing that."





**How do you prefer to receive information from Literacy Kansas City? Are there ways you'd like to hear from the organization?**

"Email seems to be good, although I do appreciate the written receipt letters for financial contributions."

**How easy or difficult is the process of making a donation to Literacy Kansas City? Are there things you'd like to see change in that process?**

"It's been fairly easy for me to donate. I set up a recurring donation through PayPal. ... It's more convenient for me since I don't really have to think about it."

**How do you feel Literacy Kansas City communicates how your donation will be spent? Are there things you'd like to see?**

"The receipt letters usually indicate all the programs the donations will be going to support. ... I'm fairly familiar with what the organization is doing. I don't have any concerns about what they're doing with the money."

**How do you feel Literacy Kansas City recognizes their donors? Are there things you'd like to see as a donor?**

"I remember last year when I donated to become a Literacy Champion, I donated to the level that allowed my name to be put on the Little Free Library at the Literacy Kansas City office, so when I come in on Thursdays (to tutor) I can see my name there."

"I know with the big fundraising events, there's always a push for large, one-time donations. But for me, as a monthly contributor, I don't usually donate to those events as much because I donate on a monthly basis. (There could be) a way to recognize the monthly donations as opposed to the one-time donations."

"If I added up all my donations, it would be a fairly sizable amount, but because it's a monthly donation, it's not recognized in the same way as the one-time donations."

"There's been some times when things have come up and I've had more expenses in my life, and I might have cut back on contributions to other organizations. ... But Literacy Kansas City is probably my number one nonprofit organization, in terms of dollar amount donated, but also in terms of my time and my attention. I've had a good working relationship with Literacy Kansas City for seven years now."

"I remember one time a couple of years ago I got a card in the mail that said, 'We really appreciate what you're doing for Literacy Kansas City'," and I really appreciated that. I had that on my refrigerator for a while."

"I remember several years ago, I donated to Heifer International. ... I remember making donations and getting a certificate of appreciation for donating this amount, and I probably still have those. ... Those tangible things I can look at and say, 'OK, my contribution is valued by this organization, and I want to keep contributing to them'."

"Since it (Literacy Kansas City) is a smaller organization, my dollars might have more of an impact here than a place that already has \$100 million coming in. ... It's not just some organization in some other state, it's local. I know the people, and the people know me. I have a connection, not just with the students."



## **Donor Interview 2: Ruth “Boots” Leiter**

### **What’s your involvement in Literacy Kansas City? How long have you supported the organization?**

(Leiter spoke about her sister’s involvement with the organization as a tutor and former board president.)  
“My sister, the organization meant so much to her, and it’s come to mean so much to me, too.”

### **Are there topics you’d like to hear more about from Literacy Kansas City?**

“I get pretty good updates through the emails of what’s going on and what help they need, and then they mail out the contribution information. ... I think they do a good job.”

### **What would you tell someone to encourage them to support Literacy Kansas City?**

“That 250,000 people in Kansas City are functionally illiterate, and that they need our help. This organization has been successful for (30) years.”

### **How do you prefer to receive information from Literacy Kansas City?**

“Probably by email.”

### **How easy or difficult is the process of making a donation to Literacy Kansas City? Are there things you’d like to see change in that process?**

“It’s very easy. ... They tell you the various levels, and it seems very easy.”

“One area where I think they fall down ... we (Leiter and a friend) wanted to make contributions to Literacy Kansas City in honor of a friend who had died, and when you do that, you want the organization ... to notify the family that you have made this contribution by letter - and they just couldn’t seem to do that. ... They could encourage people to put it in their obituaries, to send money to Literacy Kansas City ... but they need to have a procedure for acknowledging the gift and and notifying the family that someone gave something.”

“They need to encourage people to list Literacy Kansas City in their obituaries, to get that message out - they could do that through their tutors.”

### **How well do you feel Literacy Kansas City communicates with their donors? Are there things you’d like to see as a donor?**

“When they send out the flier or the email, it lists how the money is going to be used, so I think they do that pretty well.”

### **How do you feel Literacy Kansas City recognizes their donors? Are there things you’d like to see?**

“I buy a table for the (Literacy for All) luncheon, and I think - I haven’t gone in the last two years - I think they put the names of the donors on the program and things like that, and I get acknowledged how much I’ve given in the form of a letter. ... I think they do that alright, in my impression.”



## Appendix C

### Sources

#### Sources - Situation Analysis:

Giving USA. (2015, June 29). *Giving USA: Americans Donated an Estimated \$358.38 Billion to Charity in 2014; Highest Total in Report's 60-year History*. Retrieved from GivingUSA.org: <http://givingusa.org/giving-usa-2015-press-release-giving-usa-americans-donated-an-estimated-358-38-billion-to-charity-in-2014-highest-total-in-reports-60-year-history/>

Greater Kansas City Community Foundation. (2015, November 12). *GuideStar - Literacy Kansas City*. Retrieved from gkccf.guidestar.org: <http://gkccf.guidestar.org/nonprofit.aspx?orgId=1421>

Library of Congress. (2015, November 15). *Center for the Book: About*. Retrieved from Read.gov: <http://www.read.gov/cfb/about.html>

National Center for Education Statistics. (2015, November 15). *Fast Facts: Adult Literacy*. Retrieved from NCES.ed.gov: <http://nces.ed.gov/fastfacts/display.asp?id=69>

ProLiteracy. (2015, November 15). *The Crisis - Adult Literacy Facts*. Retrieved from ProLiteracy.org: <http://proliteracy.org/the-crisis/adult-literacy-facts>

ProPublica. (2015, November 12). *Nonprofit Explorer - Literacy Kansas City*. Retrieved from projects.propublica.org: <https://projects.propublica.org/nonprofits/organizations/431435729>

Turn the Page KC. (2015, November 15). *Turn the Page KC*. Retrieved from Turn the Page KC: <http://turnthepagekc.org/>

United Way of Greater Kansas City. (2015, November 15). *Our Causes - Literacy*. Retrieved from UnitedWayGKC.org: <http://www.unitedwaygkc.org/our-causes/literacy/>

#### Sources - Secondary Research on Peer Literacy Organizations:

Daxton, S. (2015, November 15). *6 Reasons for Nonprofits to Use Square*. Retrieved from ThirdSectorToday.com: <http://thirdsectortoday.com/2014/06/10/6-reasons-for-nonprofits-to-use-square/>

Del Ray, J. (2015, November 15). *Square Introduces Square Cash for Businesses, With a Low 1.5 Percent Processing Fee*. Retrieved from Recode.net: <http://recode.net/2015/03/23/square-introduces-square-cash-for-businesses-with-a-low-1-5-percent-processing-fee/>

Literacy Advance of Houston. (2015, November 15). *Literacy Advance of Houston*. Retrieved from LiteracyAdvance.org: <http://www.literacyadvance.org/>

Literacy Mid-South. (2015, November 15). *Literacy Mid-South*. Retrieved from LiteracyMidSouth.org: <http://www.literacymidsouth.org/>

Literacy Services of Wisconsin. (2015, November 15). *Literacy Services of Wisconsin*. Retrieved from LiteracyServices.org: <http://www.literacyservices.org/>

Square. (2015, November 15). *Credit Card Processing*. Retrieved from Squareup.com: <https://squareup.com/>

#### Sources - Secondary Research on Nonprofit Giving:

Blackbaud. (2014). *2014 Nonprofit Content Marketing*. Retrieved from Blackbaud.com: <https://www.blackbaud.com/nonprofit-resources/nonprofit-content-marketing-report-2013>



Bonetto, L. (2015, February). *Marketing to Millennials - US - February 2015*. Mintel.

Case, J. (2015, June 24). Millennials and the Power of Influence. *Forbes*, <http://www.forbes.com/sites/jeancase/2015/06/24/millennials-influence/>.

Fundraising Effectiveness Project. (2014). *2014 Fundraising Effectiveness Project Survey Report*. Association of Fundraising Professionals and The Urban Institute.

Hoopes, S. (2015). *Donations, Grants & Endowments in the US*. IBISWorld.

MacLaughlin, S., & Cohen, T. (2015, February). *Charitable Giving Report: How Nonprofit Fundraising Performed in 2014*. Retrieved from Blackbaud.com: <https://www.blackbaud.com/files/corpmar/cgr/how-nonprofit-fundraising-performed-in-2014.pdf>

McCarthy, D., Offutt, C., Shoaff, A., & Snyder, B. (2013, May). Online Marketing Benchmarking Study for Nonprofits. Retrieved from Blackbaud.com: [https://www.blackbaud.com/files/resources/downloads/Nonprofit\\_Online\\_Marketing\\_Benchmark\\_Study.pdf](https://www.blackbaud.com/files/resources/downloads/Nonprofit_Online_Marketing_Benchmark_Study.pdf)

Midwest Center for Nonprofit Leadership - Henry W. Bloch School of Management. (2015, November 2). *The 2015 Kansas City Nonprofit Sector at a Glance Report*. Retrieved from Bloch.UMKC.edu: <http://bloch.umkc.edu/mwcnl/resources/edward-smith-program/documents/2015KCNPSectorRpt.pdf>

National Center for Charitable Statistics. (2015, November 1). *Charitable Giving in America: Some Facts and Figures*. Retrieved from NCCS.urban.org: <http://nccs.urban.org/nccs/statistics/Charitable-Giving-in-America-Some-Facts-and-Figures.cfm>

NonprofitMarketingGuide.com. (2015, November 1). *2015 Nonprofit Communications Trends Report*. Retrieved from NonprofitMarketingGuide.com: <http://www.nonprofitmarketingguide.com/freemembers/2015NonprofitCommunicationsTrends.pdf>

Ong, J. (2014, September-October). Strategic Communications for Year-Round Donor Engagement. *Grassroots Fundraising Journal*, <http://www.grassrootsfundraising.org/wp-content/uploads/2014/09/Strategic-Communication-Year-Round-Engagement-Sep-Oct-2014-GFJ.pdf>.

Schorr, M. (2015, October 28). What Makes Millennials Give to Charity? *Boston Globe*, <https://www.bostonglobe.com/magazine/2015/10/28/what-makes-millennials-give-charity/0nkxv2YcmzYuteWiBN1FIM/story.html>.

Schwartz, A. (2013, August 21). Google Survey Reveals Patterns of How We Donate Online. *Fast Company*, <http://www.fastcoexist.com/3016088/google-survey-reveals-patterns-of-how-we-donate-money-online>.

Wolk, A., Stanzler, C., Radday, A., & Nabi, P. (2015, November 2). *Informed Giving: Information Donors Want and How Nonprofits Can Provide It*. Retrieved from RootCause.org: [http://www.rootcause.org/docs/Blog/Informed\\_Giving\\_Full\\_Report.pdf](http://www.rootcause.org/docs/Blog/Informed_Giving_Full_Report.pdf)

Westmoreland, M. (2014). *Five Ways Technology Will Shape the Nonprofit Sector in 2014*. Retrieved from Blackbaud.com: <https://www.blackbaud.com/files/resources/downloads/2014/01.14.NonprofitTechTrends.tipsheet.pdf>



## Sources - Marketing Communications Plan:

Kusnitz, S. (2014, July 17). *How to Decrease Your Website's Bounce Rate*. Retrieved from blog.hubspot.com: <http://blog.hubspot.com/marketing/decrease-website-bounce-rate-infographic>

Launch St. Louis (2015, November 12). *Flight Plan: A Guide for Building a Nonprofit Young Friends Board*. Retrieved from LaunchStLouis.org: <http://www.launchstlouis.org/wp-content/uploads/2014/09/LaunchFlightPlan.pdf>

MailChimp. (2015, November 15). *Resources/MailChimp Research: Email Marketing Benchmarks*. Retrieved from MailChimp.com: <http://mailchimp.com/resources/research/email-marketing-benchmarks/>

SocialHeart. (2015, November 15). *About SocialHeart*. Retrieved from Social-Heart.org: <http://social-heart.org/about/>



## Appendix D

### Samples of Best Practices, Supplemental Materials

#### Increasing Donors Idea: Mobile Payment Option

As fewer people carry cash or even use check books, many nonprofits are scrambling to find new ways to capture donations. Passing the hat or asking people to pull out their checkbooks only captures a small percentage of the possible donations in the room. Whether you are accepting simple donations, hosting a silent auction, accepting admission based on donations, or selling postcards, stickers or t-shirts, having the ability to accept credit or debit card transactions has become essential to maximizing revenue.

Until recently, accepting credits cards was only an option for large organizations and simply not possible at offsite events. Many smaller organizations found accepting credit cards desirable, but simply out of reach.

The staff of the Black River Academy Museum decided to incorporate “the Square” in the museum's gift shop to raise money for an annual fundraising event. According to Anita Alic, who serves on the Museum's Board of Directors, “In order for us to remain revenue neutral for the year, we needed to raise at least \$6,000 at the event. Thanks to the Square, we did it!” Total event revenue reached nearly \$6,800 with nearly \$2,000 of the donations coming from the new credit card and debit card transaction option. “People were so surprised and happy to have the option to pay by credit card. I could tell that it allowed some people to make bigger donations than they otherwise would have.” (<http://vtrural.org/programs/digital-economy/updates/credit-card-processing>)

**How it works:** You open the free Square app on your phone or mobile tablet and you put the square card reader in the top where you usually put your headphone jack. Enter the amount you want to charge, swipe the credit card and let the consumer sign their name right on the screen of the mobile device. They can get a receipt either via SMS or email. You can allow your volunteers and staff to accept donations on your behalf without access to sensitive information. Add your EIN so that all income is reported in the name of the organization, not the individual who opened the account. Keep track of donations: download sales history, view deposits, and more from Square's Dashboard.

**Fees:** Square charges 2.75% per card swipe, but has been in the game the longest and is the simplest and most aesthetically pleasing of all EMV readers. 1.5% option for non-profits.

**Details:** Square may be the most popular mobile payment option for nonprofits. This past holiday season, The Salvation Army did a test of Square at forty red kettle locations nationwide. The Army was hopeful the experiment would go better than the introduction of credit cards several years earlier. While novel, credit cards weren't a big hit because bell ringers had to record the info, not actually fun or easy. Square is easier to ask donors to do something they already know how to do, swipe their credit cards to pay.





### Know your customers better

Add customer information at the register to build your directory. Use Customer Insights to help inform business decisions.



### Send personalized email

Email templates and sample copy let you send announcements in minutes. Track results in your Square Dashboard.



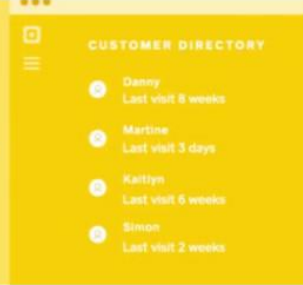
### Get private feedback

Digital receipts allow customers to leave private feedback. View messages in your Dashboard to give timely responses or send coupons.



### Build customer loyalty

Square Loyalty tracks punches in your Dashboard, and customers see progress and earn rewards automatically through digital



### Accept credit cards anywhere

The free Square Reader works with the free Square Register app to allow everyone to take payments on their smartphone or tablet.



### Works with iOS and Android

Square Reader plugs into the standard headset jack of your smartphone or tablet. Never miss a sale again.



### Serious security

Card information is encrypted at the moment of swipe. Square doesn't store data on your device after a payment has been processed.

**CUSTOMER PROFILE**

Name: Danny  
 Customer since: November 2012  
 Average spend: \$5.24  
 Visits: 24  
 Last Visit: 8 weeks ago



**EMAIL STATISTICS**

Open Rate 51%

Redemption Rate 78%

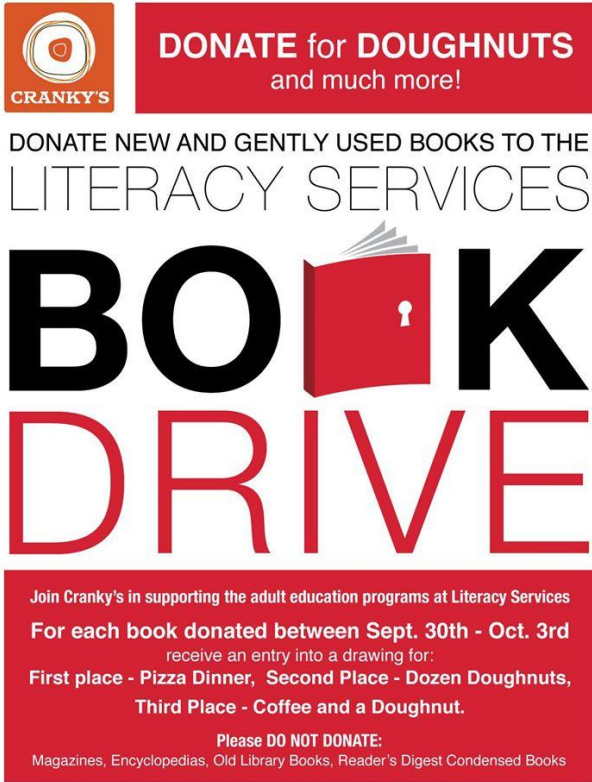
Total and Net Sales



A non-profit group uses Square to collect donations.



Literacy Services of Wisconsin Marketing Collateral:



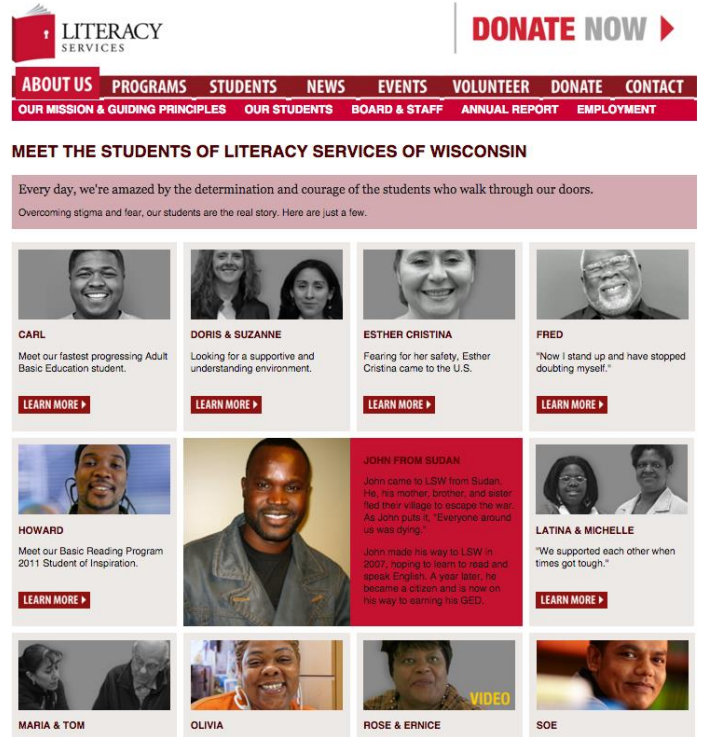
**CRANKY'S** **DONATE for DOUGHNUTS**  
and much more!

DONATE NEW AND GENTLY USED BOOKS TO THE  
LITERACY SERVICES

# BOOK DRIVE

Join Cranky's in supporting the adult education programs at Literacy Services  
For each book donated between Sept. 30th - Oct. 3rd  
receive an entry into a drawing for:  
First place - Pizza Dinner, Second Place - Dozen Doughnuts,  
Third Place - Coffee and a Doughnut.

Please **DO NOT DONATE:**  
Magazines, Encyclopedias, Old Library Books, Reader's Digest Condensed Books














LITERACY SERVICES **DONATE NOW**

ABOUT US PROGRAMS STUDENTS NEWS EVENTS VOLUNTEER DONATE CONTACT

OUR MISSION & GUIDING PRINCIPLES OUR STUDENTS BOARD & STAFF ANNUAL REPORT EMPLOYMENT

### MEET THE STUDENTS OF LITERACY SERVICES OF WISCONSIN

Every day, we're amazed by the determination and courage of the students who walk through our doors. Overcoming stigma and fear, our students are the real story. Here are just a few.

 <b>CARL</b> Meet our fastest progressing Adult Basic Education student. <a href="#">LEARN MORE</a>	 <b>DORIS &amp; SUZANNE</b> Looking for a supportive and understanding environment. <a href="#">LEARN MORE</a>	 <b>ESTHER CRISTINA</b> Fearing for her safety, Esther Cristina came to the U.S. <a href="#">LEARN MORE</a>	 <b>FRED</b> "Now I stand up and have stopped doubting myself." <a href="#">LEARN MORE</a>
 <b>HOWARD</b> Meet our Basic Reading Program 2011 Student of Inspiration. <a href="#">LEARN MORE</a>	 <b>JOHN FROM SUDAN</b> John came to LSW from Sudan. He, his mother, brother, and sister had their village to escape the war. As John puts it, "Everyone around us was dying." John made his way to LSW in 2007, hoping to learn to read and speak English. A year later, he became a citizen and is now on his way to earning his GED.	 <b>LATINA &amp; MICHELLE</b> "We supported each other when times got tough." <a href="#">LEARN MORE</a>	
 <b>MARIA &amp; TOM</b>	 <b>OLIVIA</b>	 <b>ROSE &amp; ERNICE</b>	 <b>SOE</b>

Event flyer

Website/Student Section




Literacy Services of Wisconsin  
June 26, 2014 ·

Like · Comment · Share

33 people like this. [Top Comments](#)

2 shares

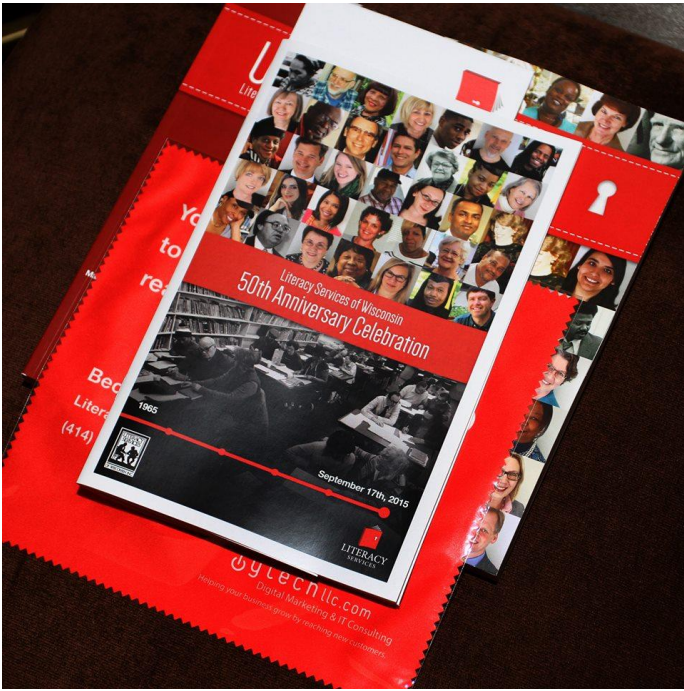
Sara Wilson Love this image showing your graduates. Way to go students and thank you Literacy Services!  
Like · Reply · 1 · April 10 at 6:38am

Write a comment...

Facebook post, Wall of GED graduates







50th Anniversary Book,  
Literacy Services of Wisconsin  
Features graduate stories



**Literacy Services of Wisconsin**  
November 13, 2013 · Edited ·

Are you going through book sale withdrawals? We sell books year-round in our lobby. Our Little Book Store changes regularly as donations come in. Currently, we have an array of Oprah's Book Club selections and a variety of brand new business & finance texts. Books are individually priced and non-negotiable. Stop on in and find a great book for a great price... and don't forget to bring in your own donations!

Like · Comment · Share

6 people like this.

1 share

Write a comment...

Suggested Groups

Facebook post promoting their bookstore.  
All proceeds go to LSW.





Literacy Services of Wisconsin

April 23, 2013 · 🌐

Once upon a time, there was a struggling writer who was working as a ticket agent for an airline. One day, in a wintery December, she received a note which read: "You have one year off from your job to write whatever you please. Merry Christmas." With the note was a year's wages. In less than a year, a draft of a novel was created which would later be published as "To Kill a Mockingbird".

In celebration of the author's birthday, we ask you to give. To give with no expectation. You never know, your gift may enable the next Harper Lee to create their masterpiece... or more!

Like · Comment · Share

👍 22 people like this.

🔄 14 shares



Write a comment...

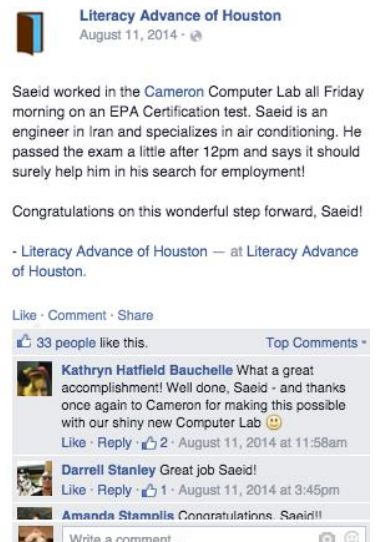
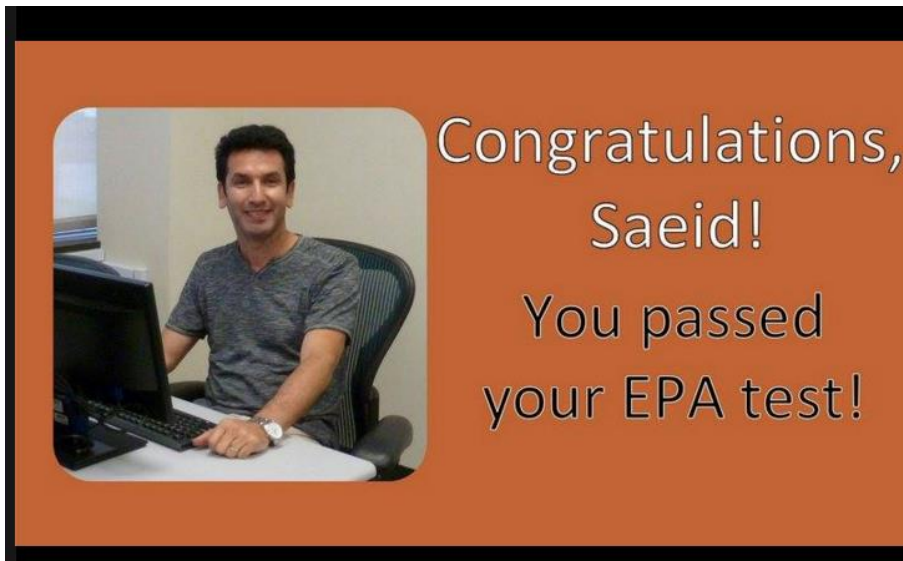


*LSW's Facebook posts often feature information about famous books, include quotes from famous literature, and celebrate famed authors' birthdays.*





LSW Facebook post about receiving a check from the AT&T Foundation.



Literacy Advance of Houston congratulating a student.



LITERACY MID-SOUTH PRESENTS

# Literatini

FRIDAY, JUNE 13<sup>TH</sup>  
FROM 7:00PM-10:00PM

THE BOOKSELLERS  
AT LAURELWOOD  
387 PERKINS EXTENDED,  
MEMPHIS, TN 38117

**STRAIGHT UP  
FUN  
FOR A  
GOOD CAUSE!**

**BENEFITTING**  
  
**LITERACY  
MID-SOUTH**

Come take in live music as you sample martinis and delicious food and bid on amazing auction items. Vote for your favorite martini as contestants compete in a "Martini Showdown" utilizing surprise ingredients.

20% OF ALL SALES AT BOOKSELLERS THE NIGHT OF THE EVENT BENEFIT LITERACY MID-SOUTH.

FOR TICKETS OR MORE INFORMATION, VISIT [www.LiteracyMidSouth.org](http://www.LiteracyMidSouth.org) OR **Booksellers at Laurelwood**

SPONSORED BY  
  
**The Booksellers**

*Event marketing sample from Literacy Mid-South for an evening fundraising event*



**GET IT NOW**

via the app stores

ANDROID APP ON Google play  
 Available at amazon

Via e-mail

Enter your e-mail address

Via QR code

Literacy Mid-South is proud to be the first adult education program in the nation to offer an app for our volunteers. The app offers tutor reports, resources, videos, calendar and various social media outlets.

**Literacy Mid-South**

**Literacy Mid-South**  
March 23, 2014 ·

Literacy Mid-South is proud to be the first adult education program in the nation to offer an app for our volunteers.

You can download it now for Android here:  
[https://play.google.com/store/apps/details?id=com.conduit.app\\_8c72bd4a416b44f3ba1e79a2bf864dad.app](https://play.google.com/store/apps/details?id=com.conduit.app_8c72bd4a416b44f3ba1e79a2bf864dad.app)

Or download it for iPad/iPhone here:  
<https://itunes.apple.com/us/app/id841914900?mt=8>

Like · Comment · Share

14 people like this.

Write a comment...

Suggested Groups

**FRIENDS WITH FIBRO**  
1,131 members

[See All](#)

**GET IT NOW**

via the app stores

ANDROID APP ON Google play  
 Available at amazon

Via e-mail

Enter your e-mail address

Via QR code



# BOOK SALE

SPONSORED  
BY

COMMERCIAL  
APPEAL  
commercialappeal.com

**SATURDAY, DECEMBER 6TH**

**AT CIRCUIT PLAYHOUSE  
(51 S. COOPER ST.)**

**10:00 A.M.–2:00 P.M.**

**FREE AND OPEN TO THE PUBLIC**

**PREVIEW HOUR: 9:00 A.M.–10:00 A.M.**

**\$15 DONATION TO LITERACY MID-SOUTH, INCLUDES COFFEE  
AND BREAKFAST, AND THE FIRST OPPORTUNITY TO BUY BOOKS**

**PREVIEW HOUR TICKETS AVAILABLE ONLINE AT**

**[WWW.LITERACYMIDSOUTH.ORG](http://WWW.LITERACYMIDSOUTH.ORG)**

**ALL PROCEEDS BENEFIT LITERACY MID-SOUTH**

**NEW BOOKS  
\$5 HARDBOUNDS  
\$3 SOFTBOUNDS  
\$10 OVERSIZED BOOKS**

For more information, please contact  
**Heather Nordtvedt** at **901-601-9692**  
or **heather@literacymidsouth.org**

*Literacy Mid-South flyer for a fundraising book sale  
and breakfast event.*



## **Appendices E, F, G**

- **Donor Communications Survey Results – Short Version to All Donors**
- **Donor Communications Survey Results – Long Version to Board Members**
- **Donor Communications Survey Results – Perceptions of Nonprofit Giving**

**Full survey results are available in a separate packet, and will be shared with Literacy Kansas City by Dropbox folder.**

