

1809 LGBT Alumni of Miami University

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2006 - 2009 Strategic Plan

Strategic Imperative 1: Board of Trustees
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Ron Clemons and Ben Drake

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Michael Burkhart and Christopher Hughes

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Suzanne Gray and Jeffrey Logel

Strategic Imperative 5: 2nd Miami University LGBT Alumni Reunion
(October 9-11, 2009)
Robert Burns, Khristopher Lowe and Leslie Morrow

2006 – 2009 Strategic Plan

Board of Trustees

Objectives

1. Recruit and retain fifteen (15) active participants on the Board of Trustees.

2006 – 2009 Strategic Plan

Membership and Dues

Objectives

1. Cultivate a minimum of 50 active donors in 2007, 100 in 2008 and 200 by 2009.
2. Raise \$2500 in membership dues/contributions in 2007, \$5000 in 2008, and \$10000 in 2009.

Implications:

To achieve our membership dues goals each year, we need an average of \$50/year per active donor.

Sub-goals

1. Increase the number of valid directory database listings by 25%.
2. Increase the number of contacts in our directory database by 25%.
3. Contact our membership quarterly via electronic or print media.

Target Market

Our target market consists of the following segments:

1. Current active donors (currently giving to 1809)
2. Previously active donors in our database (have given in the past)
3. Prospective donors in our database (have never given but may have expressed interest in 1809)
4. Prospective donors not in our database (people we don't know about yet)

Each of these four segments should be approached with different messages because they have differing levels of knowledge and commitment to 1809 and Miami University.

Message Summary

1. Current Active Donors

- a. Since this group has already demonstrated commitment to the cause, we should approach them with an opportunity to increase their commitment based a new program or opportunity to make a difference at Miami.

2. Previously Active Donors

- a. Previous donors have demonstrated commitment in the past but may not feel as close a connection with 1809 as current donors. There could be several reasons for this, but the most likely reason could be the inconsistent nature of communications from 1809 to our donor base. We should institute programs to communicate with our donors on a more regular basis in order to keep them up to date on our activities and foster closer ties to 1809. Each communication with them should contain an "ask" and a compelling reason for giving leveraging the fact that they have given in the past and inviting them to once again become involved.

3. Prospective Donors in our Database

- a. The message to this group is similar to the message delivered to Previously Active Donors. Although they have not demonstrated a financial commitment in the past, the methodology for approaching these individuals would consist of regular periodic communications setting forth a compelling reason for financial involvement. This method is similar to Previously Active Donors but the message would not reference past giving; rather it should stress reasons to become involved and ways their involvement furthers the work of 1809 for the benefit of the community.

4. Prospective Donors not in our Database

- a. The message delivered to this group would be the same as #3, above, however much more difficult to deliver. Different delivery methods will be required such as advertising and general promotion, networking with peer groups, and such.

Project Plan

Overall Goal: Cultivate 100 active donors and \$5000 by 12/31/2007

Currently have 27 active donors. Goal: 100 (increase by 73)

Sub-Goal: Contact our membership quarterly via electronic or print media

1. Develop donor package (logo, letterhead, brochure, "ask" letter)
 - a. Draft and refine content for "ask" letter and brochure. Ask letter should be targeted to 3 primary groups defined above.
 - i. Utilize testimonials from past scholarship winners, message from Dr. Hodge, quote from Leslie, quote from Ray Mock.
 - ii. Stress charitable tax deduction.
 - b. Develop logo, letterhead and brochure layout
2. Segregate mailing list for 3 primary targets and conduct mailings
 - a. First mailing should go out by September 1, 2007 and second mailing by November 15, 2007.
 - b. Apply for non-profit discount mailing rates

Sub-Goal: Increase number of valid directory database listings by 25%

Currently have 496 valid postal addresses. Goal: 620 (increase by 124)

1. Sign up with USPS for address correction service
2. Contact all valid email addresses asking for postal address
3. Cross check names in database with Alumni Assn database
4. Cross check with Yahoo Alum listserv and request postal info

Sub-Goal: Increase the number of contacts in our directory database by 25%

Currently have 748 total listings in database. Goal: 935 (increase by 187)

1. Solicit Spectrum members – listserv publicity, try to get to former members
2. Articles in Cincinnati, Columbus, Dayton, Cleveland, Toledo publications to publicize 1809 LGBT Alumni.
3. Link membership database to website to allow for self-serve signup.
4. Cross-check current Yahoo Alum listserv with membership database.
5. Advertise using Google AdWords.
6. Optimize website for search engine discovery.

2007 – 2009 Strategic Plan

Marketing

Implications:

To meet are Marketing objectives, assistance will be needed by all members of the Board of Trustees of 1809 LGBT Alumni as well as other interested volunteers. Once the objectives are met, 1809 LGBT Alumni will be better able to show that it is an active and viable concern, worthy of receiving donations, and able to demonstrate how donations are used to further its mission.

Objective #1: Develop a marketing plan that can be updated and used from year to year.

Sub-Goal: Obtain pro-bono services from Miami University's Marketing Department or from interested membership with marketing background

1. Contact business school to determine if there is a marketing class and/or service organization that could benefit from a "real world" project.
2. Enlist class/service organization to develop, under Board of Trustees guidance, a marketing plan template that can be used from year to year.

Sub-Goal: Use template each year to plan marketing/communication activities

1. Template will be a living document, which will incorporate lessons learned along the way.
2. Board of Trustees will use template to create a road map each year.
3. New ideas will be incorporated into template as approved by Board.

Sub-Goal: Introduce metrics to help Board understand effectiveness of activities

1. Use metrics to determine ineffective uses of resources.
2. Divert resources to potentially more effective activities.

Objective #2: Define consistent branding for all communications/marketing efforts.

Sub-Goal: Seek services of a commercial artist/advertiser to create several logo/branding options for review by Board of Trustees.

1. Seek out pro-bono services either using membership or university volunteers.
2. Solicit development of logos/concepts for review by Board.
3. Present options to Board and seek comments on best options.
4. Work with volunteers to update logos/concepts based on Board comments.
5. Board decides upon logo/concept.
6. Logo/concept is used throughout print and electronic interfaces.

Sub-Goal: Update all marketing materials.

1. Develop an updated brochure for distribution to interested people on campus, at alumni events, at Murstein and via the web.
2. Create electronic letterhead using logo/concept that can be updated as Board membership changes without having to reprint.
3. Create standard concept for e-mail communications.
4. Update membership form/communications to incorporate ideas from "Year of the Donor".

Objective #3: Develop ongoing communication through the national/regional/local media.

Sub-Goal: Develop a press release template and process

1. This will be driven largely by the requirements of our national/regional/local media contracts.
2. Focus on the work done by 1809 LGBT Alumni that contributes toward fulfilling the organization's mission statement.
3. Develop a standing list of media contacts to which all press releases will be sent.

Sub-Goal: Develop three strong national media contacts

1. Determine which media to contact (i.e., magazines, newspapers, web sites, etc.).
2. Develop a list of targets for media contact.
3. Requirements for maintaining an ongoing relationship with targeted media contacts.
4. Finalize list of national media contacts and requirements.
5. Reevaluate list ongoing based on effectiveness.

Sub-Goal: Develop ten contacts with local/regional electronic and print publications.

1. Determine which local/regional markets to target based on potential access to members.
2. Within targeted markets, determine electronic and print publications in existence.
3. Work with member residents in targeted markets to determine what the most effective publications are.
4. Finalize publication list and contact information/requirements for submission.
5. Reevaluate list ongoing based on effectiveness.

Sub-Goal: Create a presence for the organization on social networking web sites

1. Determine which web site to target (i.e., MySpace, Facebook, etc.) based on potential access to members.

Objective #4: Work toward creating an alumni speakers bureau.

1. Work with university administration/alumni association to determine opportunities with regard to creating a new speakers bureau or integrating into an existing bureau.
2. Determine a list of topics for which we would like to make speakers available.
3. Find members who have expertise on a given topic and are able to participate.
4. Develop content and/or guidelines to be covered for each topic.
5. Seek Board approval of topics and associated content.
6. Determine how best to communicate availability of speakers bureau to university faculty, staff, and various campus organizations.
7. Create video clips of speakers for use in advertizing. Potentially post to web site and or YouTube.

Objective #5: Increase visibility of 1809 LGBT Alumni's scholarships.

Sub-Goal: Use as many possible methods of advertising the availability of the scholarships and how to apply.

1. Research all possible methods of advertising scholarships, including print media, university communications and web sites.
2. Determine which communication methods would be most effective for reaching target students.

3. Advertise the scholarship as far in advance as possible, providing at least three months lead time before applications/submissions are due to review committee.
4. Continue communication throughout the months leading up to the due date.

Sub-Goal: Publicize information about scholarship recipients so membership is aware of the impact their scholarship contributions have made.

1. Upon award of scholarship, ask recipient to complete a questionnaire or write a short essay about what the scholarship will mean to them as they complete their studies.
2. Publish essay, along with a picture of the recipient, internally and submit externally through our press release process.

2007 – 2009 Strategic Plan

Development

Project Plan

Objective #1: Establish \$20k Operational Endowment Fund.

Objective #2: Establish a \$20K Scholarship Endowment Fund.

Objective #3: Develop \$100K in planned giving commitments.

Implications:

To create a healthy and strong organization with a strong fiscal foundation, we must create two endowments, one for operations and one for our scholarship fund. Additionally, to continue to expand on our objectives and goals for the future, we must maintain commitments now from alumni to include us in their planned giving.

Sub-goals

Complete and publish (print and electronic version) a brochure for our Operational Endowment Fund and for our Scholarship Endowment Fund.

1. Review, collect and evaluate brochures and materials from other organizations.
2. Draft materials for review.
3. Identify members or outside resource to review the draft.
4. Submit draft to board for review.
5. Produce marketing brochures and materials (print and electronic) to support our development goals.

Partner and develop plan to allow members opportunity to purchase life insurance with 1809 as the beneficiary.

1. Submit a request for proposals.
2. Review and evaluate information and make a recommendation to the board.
3. Select an exclusive vendor.
4. Add information on insurance program to our website.

Develop a fund raising plan to support our three fiscal initiatives.

1. Create and develop ongoing plan to reach our membership with all endowment and planned giving information.
2. Insert information in the registration kit at the Reunions.
3. Sponsor an event at the Reunion on Planned Giving.
4. Have an information booth at the Reunion to solicit insurance policy registrations.
5. Identify and contact six organizations for financial support.
6. Create page on website specifically around planned giving
7. Work with Marketing Committee on press releases around our development goals.
8. Include planned giving and information on endowment funds in all newsletters.

2006 – 2009 Strategic Plan

2nd Miami University 1809 LGBT Reunion

Project Plan

Objective #1: Maintain a 10% margin from the event.

1. Create a budget with cost estimate
2. Set attendance pricing at cost plus 10%
3. Approach University about Sponsorship
 - c. Identify appropriate people in administration
4. Set up tiered sponsorship program with 3 main Corporate/Individual Sponsors
 - a. Identify friendly corporations or willing alums and organizations
5. Sponsor 50/50 raffle event
 - a. Buy rolls of raffle tickets
 - b. Recruit volunteers to sell them
 - c. Decide on a price for tickets
 - d. Draw a name (decide when)

Objective #2: Sponsor a 2nd LGBT Alumni Reunion Weekend from October 9-11, 2009.

1. Organize a Schedule of events
 - a. Find out Spectrum's plans for National Coming Out Day and leverage their programming with our schedule
2. Speakers/Entertainment/Headliners
 - a. Brainstorm list of potential people
 - b. Approach about availability and cost
 - c. Contract with chosen entertainment
3. Miami University Alumni Association
 - a. Recruit liaison with MUAA (How can MUAA assist us?)
 - b. Update MUAA website with date of event and info regarding event
4. Event Spaces
 - a. Based on event schedule, decide on space needs
 - b. Work with university for appropriate contacts for space rental
 - c. Receive confirmation of spaces
 - d. Catering needs and planning
5. Update 1809 website with date of event and info regarding event
6. Recruit and assign volunteers
7. Review and update the Memory Boards

Objective #3: Develop a successful plan for attendance.

1. Housing
 - a. Recruit volunteer to contact local hotels and reserve blocks of rooms
 - b. Notify potential attendees of housing availability
 - c. Follow up with hotels leading up to event
2. Registration
 - a. Write and email registration confirmation letter
 - b. Write welcome letter and weekend overview for guest packets
 - c. Create directory of attendees for registration packets
3. 300 attendees
 - a. Identify and invite a minimum of 200 alums to join steering committee with idea of getting 50 alums on the actual committee (steering committee members would be listed in all advertising and personally solicit attendance)
 - b. Develop brochure of weekend for pre-advertisement