2017-18 MARKETING PLAN DEVELOPMENT PROJECT
Contractor: Jennifer Aries, 25th Hour Communications
PROJECT REVIEW AND ASSESSMENT

In 2017-18 the Board approved $24,000 in the budget to fund the development of a marketing plan for ACCCA that included a "soft re-brand" of the Association among its members, potential members and external stakeholders. ACCCA contracted with Jennifer Aries at 25th Hour Communications from July 2017 through March 2018 to continue the work she began in the prior year on data gathering and work with staff to develop and implement the plan.

The Plan consisted of seven goals and a series of related "tactics" that were designed and deployed based on the data collected. These seven goals were:
- *Revitalize the ACCCA Brand*
- *Identify and Promote Member Benefits*
- *Recruit New and Lapsed Members*
- *Retain Current Members*
- *Create a Communications Plan*
- *Enhance the Annual Conference*
- *Create [related] Internal Processes for the above goals*

Much progress was made in the first year of implementing each of these goals, and my assessment is that this investment has, and will continue to pay off into the future. I would also say that much was learned in this process by staff working directly with Jennifer. Her familiarity with the system in which she worked for years, and her level of expertise worked to our benefit. We are now at a place where new processes and new ways of messaging are showing results internally. How we communicate with members and others has improved significantly with better uniformity, consistency and impact. Three examples of this are the successful annual conference; higher than ever registration for Admin 101 and the volunteer response on this year's member survey.

The following report separates each tactic into one of four categories:
- **Completed and On Time**
- **Established and Ongoing**
- **Partially Established but Unresolved**
- **Not Yet Started**

By doing this we can continue to track progress as each of these tactics are implemented and adjust process as we move forward.

Tactic: Use data to identify specific attributes and repurpose them to create a new tagline that captures the essence and value of an ACCCA membership.

Through our work with the consultant, we have arrived at consensus on the tagline: "ACCCA, Your Essential Career Partner". This tagline now appears on our new marketing brochure, the web site and is integrated in selected messaging. Strategic steps beyond this tactic would be to ensure that all staff is aware of the tagline and the conditions for its usage on a regular basis. Using it too little will be ineffective and using it too much will make the tagline a punch line. Appropriate usage will be outlined in the planned in-service training on the new Marketing and Communications plan.

Tactic: Create talking points to be used by the Board of Directors, staff, committees and consultants to support the soft rebrand; submit to Executive Director for approval process

Initial talking points supporting and describing the rebranding effort were reviewed and approved. They were used at the conference and are being used on an as-necessary basis.

Tactic: Create and roll out new brand plan

The new branding [look/feel/color scheme] was successfully launched in time for the November League Conference where the public facing strategic plan was initially distributed along with the new member brochure. Additional collateral materials are being developed with the new look and feel, and adjusted messaging.

Tactic: Identify number of managers/administrators in the system; create and implement process for identification of administrators; tap Regional Member Council

Beginning in early 2017-18 staff began to work through the RMC to identify a recognized and oriented "Campus Contact" at every campus where ACCCA has members. That work continues as some appointed contacts transition from district to district, but the goal is to achieve a complete roster of contacts throughout the system. Using this roster, while still in development, we began to work through the Regional Council members to reach out to their Campus Contacts to obtain "administrative lists" or lists of all administrators, managers and directors using ACCCA classification of eligibility. Many of our Campus Contacts responded and sent their campus administrative lists. For those campuses that did not submit lists, we were able to cobble lists together using their online directories.

Once we received or completed a campus list, we vetted the lists by comparing them with our current ACCCA member lists which resulted in a verified current administrator list for each campus. The total number from each list formed the base number of administrators in the system. This "census" activity will be repeated annually in September so that by January of each year, new recruitment goals can be established.

Tactic: Establish recruitment goals

Once the census of system administrators was complete and a base number [4,948] was established, the base number was used to calculate recruitment goals that would align with the 51% goal indicated in the Strategic Plan by 2022. In order to achieve the 51% goal, and based on our current level of membership, an additional 1467 net new members [allowing for attrition] will need to be recruited between now and 6/30/2022.

This calculation generally equates to a recruitment rate of 293 new members each year, 75 new members each quarter, 25 per month or about one new member every business day of the year. Based on our current level of recruitment activity staff believes that this is an unrealistic goal.

Tactic: Purchase *Constant Contact* subscription; create email and newsletter templates

On schedule and on time. <u>Cost of annual subscription needs to be built into the budget building process</u>.

<mark>ESTABLISHED AND ONGOING:</mark>

Tactic: Establish editorial calendar and content bank

An editorial calendar is established and content will be banked, however there are no processes in place to acquire content on an ongoing basis. <u>A small committee to identify editorial content should be formed to address this need on an ongoing basis.</u>

Tactic: Revise individual program marketing plans to integrate refreshed brand; integrate w/editorial calendar

This tactic is noted as complete on the internal assessment of the Marketing Team, however examples of new program marketing collateral should be provided to the Board in June as a part of the debrief on the marketing project.

Tactic: Create a single "tone" and messaging; ensure personal, supportive tone with action and vibrancy.

Although this is indicated as complete, it is more of an ongoing effort. The identification of tone/messaging was completed but integrating it on an ongoing basis is a constant process for all outgoing messaging. The tone/messaging has been altered from directing messaging to the wider community to directing it at the individual member and has changed from the voice of the ED or staff to the voice of the Board or other ACCCA leaders. Continuing to incorporate the new tone/message direction in all outgoing messaging will be emphasized in the planned in-service training with staff.

Tactic: Identify collateral needs - print and digital

Initial identification of urgent collateral needs was completed in a timely manner, but the need to keep these materials current and refreshed is ongoing. Collateral material includes not just the obvious member brochure and training program flyers, but also the standard letters we send out for confirming membership, program selection or denial etc. Each need ongoing review to ensure that they not only fit the new look but contain the appropriate message and tone. As our new strategic initiatives emerge [1st year program; increased outreach; invitation to join a commission or committee], these elements will have to be present in any outgoing material and each staff member will need to be aware of how they apply. This should be covered in detail at the staff marketing in-service training.

Tactic: Use member photos and testimonials in all collateral; need to identify and contact current members willing to participate; obtain their testimonials and photos

Staff has already collected some testimonials and are banking them, but a plan to effectively use them needs to be developed along with documented process details. How are subjects identified and all necessary permissions granted? How/when/where are they captured? Are there budget considerations? And, most importantly, how when where are they used, and how long are they kept and how often are they used? These basic questions must be answered before this tactic can be considered an effective marketing tool on an ongoing basis.

Tactic: Create collateral material with refreshed brand and testimonials; identify writer, designer and timeline

Assuming the ongoing need for current collateral reflecting the latest messaging and tone, materials should be curated on an ongoing basis and an assessment of what is needed for the year [our programs and benefits are essentially the same year to year] should be done materials made easily accessible to anyone who needs to access it. If a Board member is recruiting someone from their college or the Recruiter is reaching out, or staff is attending an affiliate event, there should be appropriate materials banked on the J drive or the web site and available without having to check in with Patti. I'd like an inventory of those materials, scripts etc. and their status.

Tactic: Identify and promote benefits through clear, concise explanation including how they directly support the member; these should be tangible and intangible

By the end of the current 17-18 year an Ad-hoc committee will be formed and will provide a review of the existing benefit array, including stats [any that we can get] on usage and commentary from the current member survey. The Ad-hoc committee will review materials and background information provided by staff offline and then meet/confer to assess/rank the value based on their own experience, the feedback from the survey and the related cost of the benefit.

The RMC will oversee this work and formulate a recommendation with staff for the Board's consideration [timeline TBD but within the first six months of 18/19]. Once the Board has acted on the recommendation staff will act accordingly to cease, maintain or acquire the combination of benefits for members that will best serve them. From a marketing perspective, messaging should be developed for members in the interim, and once a new benefit package is established, the best way to message that launch.

Tactic: Annually identify how many members are using benefits, and depending upon usage, decide efficacy of keeping specific benefits

Staff will solicit/receive usage data from CLC and SASS on benefits used by members as of 6/30/2018. That data will be added to survey results and commentary from members, as well as our staff assessment and cost ratio to deliver a report to the Ad-hoc committee for their review and ranking. Committee results will be provided to the RMC for analysis and development of a recommendation at their May/June meeting. A recommendation will be prepared in time for the Board's first read in June.

Tactic: Identify conferences and meetings with target audiences for staff to attend and pitch ACCCA and/or have the Recruitment Consultant exhibit and recruit. At ACCCA events, assign mentees, program grads from 101& 201 and board members to rotate shifts so there is always an ACCCA member in the booth at every event.

This is a formalization of an informal process currently employed. Annually the ACCCA budget includes funding for recruitment and outreach activities and some of those funds are used to participate in the events of affiliate organizations. Each year staff reviews the professional development and event calendars of recognized affiliate groups to identify those events where recruitment is most likely to result in new members and succeed to an extent that the annual dues of the members recruited at the event will more than offset the costs [sponsorship and staff travel] of participating in the event. Often, a quid pro quo arrangement is made with the affiliate to discount the sponsorship fee which makes it easier to participate. Additionally,

ACCCA has a membership recruitment component built into each of its own events. The marketing consultant has recommended using members who have recently completed an ACCCA training program to "man the booth" for a more compelling sales pitch.

These annual efforts build connections with the individuals who attend events of our affiliates and they will continue, however, specific guidelines for the selection of the events should be established along with a protocol for how recruitment is carried out at these events.

Tactic: Send information packets to Human Resources Offices/Colleges

This is a tactic used before and will be an annual activity. Specific messaging along with an established list of materials that accompany the communication should be articulated and documented.

Tactic: Using research data, create and implement a retention plan focusing on enhanced activities and communication to new members

This tactic represents a combination of efforts already underway and is somewhat redundant in that all of the efforts around the first year program, improving benefits, and improved communication that are delineated throughout this plan are all devoted to the overarching goal of member retention.

Tactic: For members vetted out of programs like Mentor, 101 and 201, identify alternative activities in the context of the rejection letter to keep them engaged.

This tactic was already in practice and addressed early on in the Marketing project when new rejection letter language was established. As we now approach the next Great Deans program and the 2018 Admin 101 program vetting process, it will be employed again very soon. What I don't see at this point is a standardization of language and process across established programs. If this is a standardized process, it should be documented, articulated and something all staff is cross-trained on.

Tactic: Establish timeline and process for all association communications and their distribution – add to editorial calendar

This is established and continues to be refined and updated as the overall marketing plan evolves.

Tactic: In all communications, position conference as leading professional development program in the system

Tactic: Create specific conference promotion plan leading with program changes based on research/member voices/Conference Planning team

New communication tactics were prepared in the late summer to address these challenges and they were deployed for the 2018 conference in a more effective way than prior years. The 2018 conference was very successful for a number of reasons but changing the way we promote the event was one of the factors. These tactics will of course continue and evolve under the direction of the Manager of Marketing, Communications and Technology.

Tactic: Through talking points and working with Recruitment Consultant, integrate promotion with outreach and show benefits of attendance

Although the role of the Recruitment Consultant is currently being reviewed, the tactic will continue and evolve under the direction of the Manager of Marketing, Communications and Technology.

Tactic: Identify necessary data to assist with marketing on an on-going basis; consider annual interviews with members, lapsed members and non-members

Tactic: With Regional Council, identify topics and dates for field Quick Polls – add to editorial calendar

Tactic: Create a plan for regular data review, identify necessary metrics and update communication plan as needed; identify needed data, collection methods, and timelines for collection

Tactic: Manage mailing lists – review and enhance on weekly basis

Tactic: Develop process for onboarding new and lapsed members

Tactic: Develop process for onboarding new volunteers like co-chairs, committee members, etc.

Each of the above six tactics are inter-related and valuable to member recruitment/retention and our marketing goals overall. At the coming in-service training, we need to address and discuss each independently so that each can be thoughtfully and intentionally incorporated into our existing processes.

The Strategic Planning assessment process we will be using at the June meeting is an outgrowth of the previous year's work and it is designed to focus in on the specific goals and tasks of the

plan, provide evaluation and assessment, apply data and information and ask key questions about the task or the issue. Armed with this information and the broad data sets that are being prepared, each of the four groups will be well armed for their deliberations and our 2017-2022 plan will be thoroughly considered and appropriate adjustments will be made.

Keeping our mailing lists and the internal directory synced and updated is important and I think we all need to be on the same page with Patti in terms of keeping those lists current, but I get the sense that Constant Contact will eliminate this problem to the greater extent.

Quick Polling should be a regular activity, but that can't happen until it is one that is incorporated into the editorial calendar and until such time as the process for identification of polling questions is better established. We need to also find ways to distribute and use the data so it is attributable to ACCCA instead of just shelving it.

The new member onboarding process is essential to assess and re-establish up front prior to having an Ad-hoc committee recommend elements of a First-Year program as the two are integrated processes.

Working directly with Jennifer, Patti has made outstanding progress on so many of these tactics on her own, but the volume is still overwhelming and my sense is that the full staff really has no idea of the full impact of the overall plan. For this reason, we have scheduled a full day in-service training for all staff in the next few weeks. Jennifer has agreed to moderate the training and we will be focusing on individual processes for each employee within each area.

Tactic: Identify regions and members– put on website and in promotional materials

Currently our regions are established and the Campus Contacts and members that fall within those regions are identified, however Staff is exploring how to best make this information available. Given the constant change of both the member lists and the Campus Contacts by Region roster, we are debating the usefulness of this to members as it will almost always not show as current and as such is likely to generate more questions than it will be a valuable resource. A generic breakdown of the regions and the districts included in them can be easily maintained and already exists on the site.

Tactic: Create regional workshops and promotional materials and templates – identify writers, designers, distribution channels –add to editorial calendar

Recently guidelines for establishing regional events/activities were developed by staff and vetted through both the RMC and the MDC. These guidelines cover the approval process for establishing an event or program and processes for the conduct of them. Currently one event is in development for the 2018-19 year on the topic of Project Management. As yet, promotional materials and templates are not yet developed.

Tactic: Reinstitute newsletter in short-form digital format; begin with conference follow-up issue; note in editorial calendar; stories on agency collaboration; deliver via Constant Contact

The future of the newsletter is in question. Besides the difficulty in obtaining content on a regular basis, we haven't produced this communication to members in well over a year although, while reference to it has apparently been deleted from the web site and the member brochure, it is still listed on the membership card as a member benefit. This puts ACCCA in direct conflict with what members have traditionally seen as a member benefit [per past member surveys] and what we had traditionally advertised to members as one reason to join. All of this is in contrast to what marketing professionals will tell you about Association newsletters and how they are disappearing in favor of more immediate online and app based information delivery.

I may be "old school" but I disagree with the assertion that we should do away with the newsletter. I think this is a solution that is being proposed because there are currently no easy answers to the difficulty in getting content. Before this project wraps up, we [staff and our consultant] need a deep conversation about why a member Association should have a communication vehicle in the form of a monthly or quarterly, semi-annual or annual publication, or conversely, why it doesn't matter. *(currently going before the board for discussion)*

Tactic: Create promotion plan exclusively for benefits using member photos and testimonials; focus on intangibles in addition to tangibles; networking, learning, friendships

Once the benefits review is complete and the Board acts on the anticipated recommendation from the RMC, a corresponding promotional campaign to re-introduce ACCCA members to their benefits and adjust existing marketing to include any new information about benefits. I note that the current membership card indicates benefits on the back and it includes "a monthly newsletter" so all materials will need to be reviewed and updated.

Tactic: Work with member team to create First-Year Experience for new members; identify key services that will benefit new members; develop curriculum; create and launch communication/marketing plan

Also, by 7/01/18 an Ad-hoc Committee will be formed to explore elements of a first-year protocol for all new members. These elements would include: Once the program and related processes are established [anticipate by 1/15/2019] the protocol would be applied to all new members who have joined ACCCA within the past six months and the protocol will be initiated for anyone joining ACCCA going forward.

Tactic: Add faculty and staff on leadership track as secondary target audiences; consider adding one or two sessions at the conference targeting these groups; consider creating subscription webinar series on "how to become an administrator" for professional development

This approach will need some further definition and more buy-in from the Board before staff can take it on as an initiative. As evidenced as prior discussions by the Board, there are two schools of thought on this goal. Some believe that establishing programs, or expanding existing capacity, to accommodate the training needs of faculty or classified personnel—even if they are on a track to administrative positions--displaces access to existing administrators based on ACCCA's ability [bandwidth] to provide programs. Others feel that pipeline programs for faculty and classified personnel is a direct line to increasing membership as these classes of personnel are transitioned to administration. Staff will await consensus and further direction from the Board before proceeding or spending valuable time on development.

Tactic: Hold 101 and Mentor Program reunions to increase attendance going back five years

I think this is a great tactic that we should try to implement for the 2019 conference but it will require early planning to communicate to specific audiences in advance.